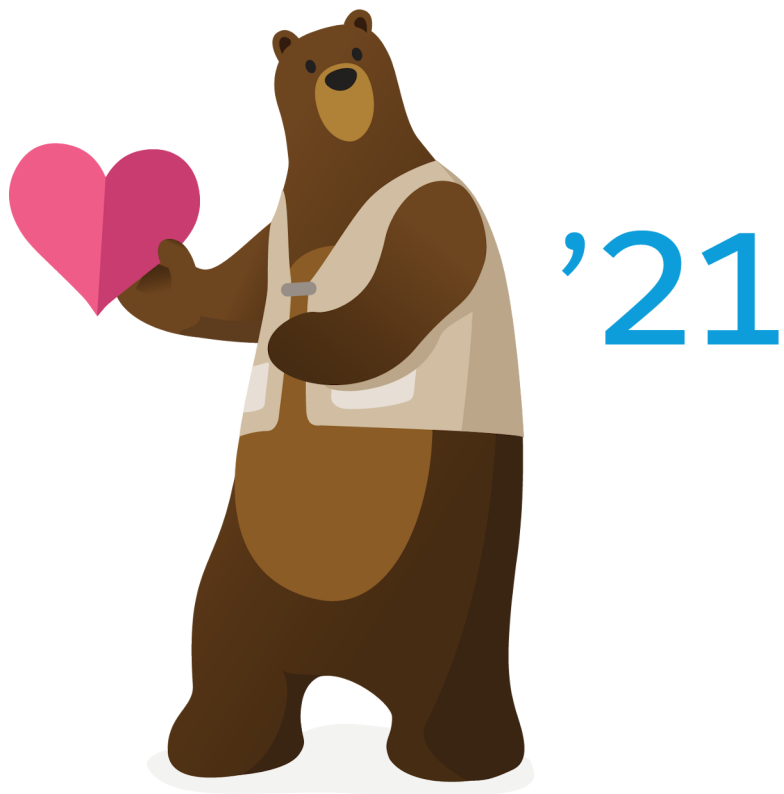salesforce

Salesforce Release Notes

Salesforce, Spring '21

Maximize your Salesforce ROI with the latest features, most of which come standard

'21

CONTENTS

SALESFORCE SPRING '21 RELEASE NOTES

Did you know most new features are included with your initial purchase? Explore the latest innovations in the release to maximize your ROI from Salesforce.

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 Spring '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 that make it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Salesforce Overall

Language throughout our product was updated to reflect inclusivity. Salesforce Release Notes moved to Salesforce Help for a more unified user experience. Recently Viewed lists have customizable actions. You can add images to your in-app guidance, and snooze guidance so you can see it later. Use new survey actions in a flow and target specific survey participants with invitation rules. Use the new Salesforce Scheduler trial org to get a head start on your implementation, and set default time zones for appointment slots. Search using everyday words with natural language search for Government Cloud and the Salesforce mobile app.

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

Get excited for a smarter Service Cloud. Dive into your Einstein Article Recommendation model in a new scorecard, and deliver data from standard and custom objects in Einstein Bots. Field Service streamlines the scheduling experience with point-to-point predictive routing, appointment matching for shifts, and alerts when your mobile worker arrives. With setup enhancements and new productivity tools in Service Setup Assistant, Service Cloud Voice, and Knowledge, you get more time to focus on your customers.

Sales

Salesforce Meetings helps sales teams prepare for meetings and engage attendees. High Velocity Sales users can use Einstein Conversation Insights with video calls, track the opportunities and revenue that result from sales cadences, and retire sales cadences without losing the data. Adjust forecasts on the go with the Salesforce mobile app. Track when emails are temporarily undeliverable, and test and share email templates.

Revenue

Salesforce CPQ improvements include smoother amendment and renewal service upgrades, background contract amendments, and a change ensuring correct price rule configuration. With Salesforce Billing, configure how invoice lines are created when you use a bill through date override, and map financial information to customer accounting and enterprise resource planning (ERP) systems. You can also highlight the long-term value of a lifecycle-managed asset. Standalone order activation and product creation logic are improved. And Advanced Approvals users can manage their approvals without logging in to Salesforce.

Industries

An unprecedented wave of new vertical solutions awaits you. Loyalty management helps you run personalized customer recognition, reward, and retention programs. Batch management lets you process and track millions of records. With decision tables, you can define multiple business rules to evaluate products and calculate discounts. Our new data processing engine extracts and transforms data from your org and creates records with the transformed data. It's easier to manage sales agreements and account forecasts in Manufacturing Cloud, and Rebate Management supports volume-, revenue-, and growth-based rebate programs. Meanwhile, Health Cloud makes provider management easier with a new API and new FHIR-aligned support for electronic health records, and Financial Services Cloud helps you track branch performance and capture life events and business milestones on the go. Consumer Goods Cloud makes store visits and deliveries smarter, while Public Sector Solutions adds calendar support and makes application approval more transparent. Emergency Response Management adds updated flows to improve your emergency response experience.

Analytics

Fast-track important business decisions with an improved Lightning Experience report builder, save time building and managing dashboards with reusable components, and find insights in a flash with a redesigned Einstein Discovery interface.

Salesforce Einstein

Einstein Recommendation Builder is Generally Available and checks your data as you build. Einstein Article Recommendations has a scorecard to help you make the most out of your data and improve your recommendations. Navigate insights more easily with Einstein Discovery's story interface.

Commerce

Our new Omnichannel Inventory service unlocks the power of-real-time inventory availability for B2C Commerce and Salesforce Order Management. B2B Commerce provides enhancements to make it easier for you to work with Commerce data and manage your products, and to configure checkouts and integrations. Salesforce Order Management introduces new flow core actions and expanded support for B2C Commerce custom data.

Experience Cloud

Spring '21 brings a fresh start for Community Cloud with a brand new name—Experience Cloud. As part of that refresh, we updated the tools you use to build your sites and made several terminology and documentation changes. The Build Your Own (LWR) template is now generally available and includes support for Salesforce CMS content. And we added enhancements to several Lightning components.

Salesforce CMS

Do more with your Salesforce CMS content than ever before. Deploy consistent content using content key, add it to the new Build Your Own (LWR) template for Experience Builder sites, and export it to other orgs and workspaces.

Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for iOS and natural language search on mobile. Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud and comes with iPad support.

Salesforce Sustainability Cloud

Resolve issues with your carbon footprint record data with Data Gap Filling. Individually lock or unlock energy use records with Individual Locking Control.

Customization

Access prior record values and reduce automation time and maintenance costs with Salesforce Flow. Build recommendations and predictions confidently and easily with improvements to Einstein Recommendation Builder and Einstein Prediction Builder. Configure more flexible and better-performing Lightning pages in the Lightning App Builder.

Security and Identity

Simplify web session management with OAuth 2.0 updates. Manage My Domains more easily. New datasets help you analyze usage across Salesforce in the Event Monitoring Analytics app. And Security Center offers more hands-on ways to view your security data.

Single Source of Truth

Learn what's new with Single Source of 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

To use Ant Migration Tool version 51.0, install Java version 11 or later.

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.

Salesforce Anywhere

Say hello to the expanded Salesforce Anywhere, which now includes all the features you know and love from Quip for Customer 360. Learn about the latest updates to Salesforce Anywhere Beta features.

Pardot

Set up Pardot faster, maintain engagement data streams with First-Party Tracking, and enjoy enhanced functionality in email personalization, deliverability, and reporting. We improved clone actions too, so you can easily copy email content or new asset types associated to your campaigns.

Marketing

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

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but that can affect your existing customizations. Find the Spring '21 updates in the Release Updates node in Setup.

myTrailhead

Add your company's product names to the Products list on myTrailhead and help your users pinpoint the content they're looking for. Complete myTrailhead modules without leaving the Salesforce app thanks to In-App Learning with Trailhead.

Other Salesforce Products and Services

Spotlight on Content

We added a Trailhead module; instructional videos; and a new resource, Communities User Licenses for Industries.

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 left side of the page.

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 left side of the page.

Click the filter icon (▼) next to the search field on the left side of any page to show the filters.

EXPERIENCE	See which features are available in Lightning Experience, the Salesforce mobile app, and Salesforce Classic.
EDITION	Select one or more editions to filter the release notes to show only the enhancements that are available in that edition.
FEATURE IMPACT	Some features require you to enable or configure them before users can get the benefits. For example, as an admin, filter the release notes to focus on or hide just those features.
PRODUCT AREA	See only the release notes for products that your org uses. If your org does sales but not support, filter your release notes so that only the sales-related news appears.

Expand the filter to see all available options. Select one or more options per filter, then click **Apply** to apply the filters.

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
Salesforce Overall	
Add pictures to in-app guidance	Add Images to In-App Guidance
Sales	
Insert Google Hangout or Zoom Link	Add Zoom Meeting Links to Events Created with Insert Availability in the Outlook Integration with Inbox

IdeaExchange	Idea delivered
Link Campaigns Directly to Accounts	Track Accounts as Campaign Members (Beta) on page 634
Use Lightning Email Templates in Email Alerts	Use Lightning Email Templates in Salesforce Automations
Ability to add Lightning Email Templates to Changes Sets and Deploy from Sandbox	Distribute Lightning Email Templates with Packaging and Change Sets
Service	
Lightning Knowledge - Favorites Should Always Pull Most Current Article Version	Point Your Favorites to the Latest Versions of Articles
Analytics	
Notifications and Subscriptions in Embedded Dashboards	Enable Notifications and Subscriptions in Embedded Dashboards
Allow Compare Tables to Have More Than Four Groupings	Group Data by up to Six Fields in Explorer
Ability to Pass Dashboard Filters by URL	Save Dashboard Results with Filter URL Parameters
Lightning Report Builder Extremely Slow and Buggy	Streamline Report Creation with Multi-Field Selection
Customization	
Increase field level help text limit from 255 to 510 characters	Get More Characters for Field-Level Help Text
Security and Identity	
Custom Domains for Sandbox Sites	Test Custom Domains in a Sandbox (Generally Available)

Release Note Changes

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

May 26, 2021

Removed: Standardize Your Salesforce URLs with Enhanced Domains
This feature is now available in Summer '21.

May 3, 2021

Create Scratch Orgs with More Features
Added information about the continued availability of the ContactsToMultipleAccounts feature.

Standardize Your Salesforce URLs with Enhanced Domains
Updated this feature's availability date for all customers to May 28, 2021.

Enrich Salesforce Data at Scale with Salesforce Data Pipelines
Added information about the new Salesforce Data Pipelines product that's now available.

April 19, 2021

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

This release update has been postponed indefinitely.

Salesforce for Outlook Is Being Retired Between Summer '21 and June 2023

Added a more precise date for the Salesforce for Outlook action menu removal.

Restore Access If Service Is Interrupted

Removed the option to restore Salesforce for Outlook service by opting in to extended support for Microsoft Internet Explorer 11 on Lightning Experience. That option is no longer available. However, customers with Salesforce Classic access can still restore service by exposing the Salesforce Classic Switcher to Salesforce for Outlook users.

April 12, 2021

Share Vaccine Information with Vaccine Eligibility Packages

Added a release note about the Vaccine Eligibility Form and Updates packages.

April 5, 2021

REMOVED: Authentication Change for Exchange Online Inbox Users

Removed this release note because Microsoft adjusted the timeline for retiring the Basic Authentication with Exchange Online beyond the end of 2021. Check the Microsoft documentation for updates and retirement announcements.

Lightning Sync for Microsoft® Exchange

Revised the introduction to the Lightning Sync section. Removed an outdated reference about the retirement timeline for Basic Authentication on Exchange Online.

Set Preferences for Allowed Cookies for Experience Builder Sites

Clarified that this feature is available with Lightning sites only.

Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

Clarified that this release update doesn't affect the usage of Apex setters.

New and Changed Objects

Added information about a new field on the FieldServiceMobileSettings object.

New and Changed Objects

Updated information about the `Context` field on the IframeWhiteListUrl object.

Control Einstein's Automated Actions with Precision

Added a release note about the expanded range for prediction confidence thresholds.

Assign Records Created by Site Guest Users to a Default User

New release note.

Analyze Screen Flow Usage (Update)

Added a new release update that lets you use reports to discover usage metrics for your screen flows.

Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update)

Changed the enforcement date for the release update to Spring '22.

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

Enabled the test run option for this update due to a known issue. You can still disable the test run.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

Enabled the test run option for this update due to a known issue. You can still disable the test run.

Standardize Your Salesforce URLs with Enhanced Domains

Updated this feature's availability date to April 30, 2021.

Integrate Custom Shipping Item Data from B2C Commerce

Added a release note for the patch addition of custom data integration support for the B2C Commerce Shipping Line Item object and Salesforce core OrderItem and OrderItemSummary objects.

March 22, 2021

Manage Access to Login Flows with Profile Filtering

Added a release note about changes in login flow access when Profile Filtering is enabled.

Require Secure HTTPS Connections for All Third-Party Domains

Added a release note about the upcoming enforcement and removal of the Require secure connections (HTTPS) for all third-party domains setting in Summer '21.

Enable HTTPS on Your Domains

Added information about enabling the HSTS for Salesforce Sites and Experience Cloud Sites setting.

Point Your Favorites to the Latest Versions of Articles

Added a bullet that states if the newest article version was published recently, you must refresh your browser for that version to appear as a favorite.

Create trust cards to display the COVID safety protocols that your business follows on page 583

Added information about the LocationTrustMeasure object.

Install and Use the B2B Commerce for Visualforce More Easily in a Scratch Org

Added a release note about adding the B2B Commerce permission set license in a scratch org.

REMOVED: Improved Experience Cloud Site Mobile Interface with SLDS Touch Styles

Removed this release note and added pertinent information to a Known Issue.

March 15, 2021

Browse, Buy, and Manage Your Products with Subscription Management App (Beta)

Introduced the Subscription Management App (Beta).

Improve Connectivity with Salesforce Edge Network

Clarified that moving to Salesforce Edge Network can only be undone by Salesforce Customer Support. Also fixed a broken See Also link to Salesforce Edge Network documentation in Salesforce Help.

New and Changed Objects

Added query information for the `Language` field on the `KnowledgeArticleVersion` and `Knowledge_kav` objects.

Metadata API

Added information about the new `authenticationType` field on the ExperienceBundle type.

Get Smarter Travel Time Estimates with Point-to-Point Predictive Routing

Removed that Predictive travel (beta) is scheduled for retirement in all Salesforce orgs as of Winter '22 and point-to-point predictive routing replaces it, since plans for Google are unknown at the moment as some customers depend on it.

Encrypt Responses in a Survey

Updated the encryption schemes that Shield Platform Encryption supports for Salesforce Surveys fields.

Integrate Custom Shipment Data from B2C Commerce

Added a release note for the patch addition of custom data integration support for the B2C Commerce shipment object and Salesforce core OrderDeliveryGroup object.

Learn More About Your Bots with New Metrics

Added link to new AppExchange package for bot metric reporting.

Debug Failed Flows More Easily

Fixed how a batch of failed flow interviews is saved. Previously, in a batch of failed flow interviews, up to 100 failed flow interviews were saved. Now, one failed flow interview is saved from the batch.

March 8, 2021

See Only Relevant Subscription Products in Amendment and Renewal Quotes

Added a release note explaining that if you use the CPQ Large-Scale Amendment and Renewal Service, amendment and renewal quotes created as of Spring '21 include only assets factored into price calculations instead of all entitlement-related assets.

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

This update was again postponed to and is enforced in Spring '22. Clarified the security best practices and default user access for flows.

Use Einstein OCR to Detect Text in Common Forms

Added information about Einstein OCR support for standard forms.

Tableau CRM for Everyone

Added information about version 12.1 of Tableau CRM for iOS and Android.

Lightning Web Components Playground Retired

Added note about the removal of the playground in the Component Library.

Required Setting Changes for Some Microsoft Office 365 Customers

Microsoft recently adjusted their Basic Authentication retirement timeline for some Exchange Online customers. As you prepare for the retirement, check out the updates to our Lightning Sync release note and retirement article, which reference the latest Microsoft communications about the timeline.

New Financial Services Cloud Metadata Types

Added note to reflect the addition of the ParticipantRole metadata type to the *Financial Services Cloud Developer Guide*.

Scale Your Contact Center with Voice Resiliency and Increased Voice Platform Limits

Added note clarifying that Voice scaling can be impacted by telephony provider limits.

March 1, 2021

Scale Up Intent Models with Multi-Language Support for Input Recommender and Input Recommender for Intent Sets (Beta)

Updated supported languages.

Named Credential Callouts in Anonymous Blocks Require Customize Application Permission

Added information about new user permission requirements when using named credential callouts in Anonymous Apex.

Get More Details About Sales Cadence Performance

Updated screenshot to show Target Dispostion field.

Discover Issues with Send Email Actions Earlier

Added a release note about improved error handling for Send Email actions in Flow Builder.

Other Changes to Consumer Goods Cloud

Updated information field history tracking and formula fields. Also, added relevant See also links.

February 22, 2021

Encrypt Responses in a Survey

Release note added about supporting Platform Shield Encryption for responses in a survey..

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

Added information about the impact on processes built with Process Builder, instructions for preparing the org for the update, and information about applying the update to fix errors that cause failed flows and processes.

Get More Predictable Target Behavior for Non-External Hyperlinks

Added information about hyperlink target behavior change.

Keep Conversations Secure: Bots HIPAA and SOC2 Compliance

Updated information on compliant channels.

Everything That's New in the Salesforce Mobile App

The 230.000 release for the Salesforce mobile app for iOS is delayed until March 2021.

UI Changes for Lightning Web Components

Added a note clarifying that edit highlight behavior doesn't apply to Financial Services Cloud or Health Cloud.

Removed: Recipes with Dataset Sources Run Faster

Removed the release note entitled "Recipes with Dataset Sources Run Faster" because the enhancement was removed from the Spring '21 release.

Use Omnichannel Inventory Features in Flows

Invocable Actions

Metadata API

Added information about Omnichannel Inventory flow core actions.

Use New Order Management Routing Features in Flows

Invocable Actions

Metadata API

Added information about new Salesforce Order Management flow core actions.

February 15, 2021

Lead/Contact ID Label Was Changed

New release note added to clarify a field label change.

UI Changes for Lightning Web Components

Clarified when these changes can be seen in orgs.

Get the Latest Version of Tableau CRM for iOS

Added information about version 12.0 of Tableau CRM for iOS.

Permission Set Requirement Was Added for Contract Amendment and Renewal

Specified permissions needed for users to be able to amend or renew contracts.

New and Changed Objects

Added information about the AsyncOperationLog object in the Commerce section.

Other Improvements to Einstein Bots

New release note clarifying the behavior of transfers on the Chat and Messaging channels.

Run Reports on the FHIR R4-Aligned Data Model

New release note added for the upcoming support for reports.

Update Your AppExchange Payment Information Quickly

We added an Update Payment button to the Security Review tab.

New and Changed Objects

Added information about new employee photo URL fields for the Employee object.

Test Custom Domains in a Sandbox (Generally Available)

Clarified which orgs are currently excluded from using this feature.

February 8, 2021

Consumer Goods Cloud Has New Objects

Changed the new field name of the RetailVisitKPI object from SourceRecord to ContextId.

Salesforce Mobile App Requirements Have Changed

Removed iPhone 6 from the list of supported devices.

New and Changed Standard Platform Events

Added information about `Username` field being removed from Real-Time Event Monitoring Objects for Mobile.

Get Global with Bot Language Updates

Removed Danish, Korean, and Swedish from Beta supported languages.

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

Enforcement of this release update has been postponed from Summer '21 to Winter '22.

New and Changed Objects

Added information about the AIApplication, AIApplicationConfig, MLField, and MLPredictionDefinition objects.

Keep Conversations Secure: Bots HIPAA and SOC2 Compliance

Added information about Bots HIPAA and SOC2 Compliance.

New and Changed Connect REST API Resources

Added information about the Employee Profile resource.

New and Changed Connect in Apex Classes

Added information about the Employee Profile class.

Other Changes to Consumer Goods Cloud

Added information about Consumer Goods objects access management and the relevant See also link.

Changes to the Self Service Permission Set

Added a release note about removing object permissions for guest users which can cause them to be removed from the Field Service Self Service permission set.

Removed: Recently Viewed Lists

Removed the release note entitled "Power Up Recently Viewed Lists with Customizable Actions" because the feature was temporarily removed from the Spring '21 release.

Everything That's New in the Salesforce Mobile App

Updated the release date for the 230.000 version of the Salesforce Mobile App for iOS. For more information, see Salesforce App for iOS release 230.000 is delayed.

February 1, 2021

Spotlight on Content

Added information about our latest content enhancements.

Deliver Customers Their Service Work Entitlement

Added information about adding the Work Orders Per Entitlement and Remaining Work Orders fields to Entitlements.

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

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

New and Changed Connect REST API Resources

Added information about bulk uploading conversations.

Plan Ahead with Advanced Maintenance Recurrence

Added information about when features become available, clarification to set up requirements, an additional example, and example clarification.

Hide First and Last Name Fields in SOAP API for Experience Cloud Site Users

Added release note about a new setting that hides first and last name fields in SOAP API.

Data Processing Engine

The name of Sonic has changed to Data Pipelines.

Standard-Volume Platform Events Are Now Published Asynchronously

Added a release note about the changed publishing behavior of standard-volume platform events.

UI Changes for Lightning Web Components

Added information about a formula field editing message.

Einstein Call Coaching Is Now Einstein Conversation Insights

Added a release note about the name change for Einstein Call Coaching.

Commerce: Salesforce Order Management

Removed the release note entitled "Create Fulfillment Orders Manually" because the feature was removed from the Spring '21 release.

Customize Your Default No-Reply Address for Email Notifications on page 152

Clarified details in shortdesc and added Aloha to available editions

FHIR R4 Support for Better Interoperability

Updated the information about supporting future customers with the packaged EHR data model.

January 30, 2021

Create Provider API on page 255

Clarified the scope of the change.

January 25, 2021

Metadata API

Added information about new fields on the FieldServiceSettings metadata type.

Get Information About Lightning Component Requests in the EventLogFile

Added information about the new Aura Request event type.

New and Changed Objects

Added information about the new `IsTimeZoneEnabled` field on the FieldServiceMobileSettings object.

Get Ready for Changes to Apple's Privacy Policy

Clarified that the Allow Cross-Website Tracking setting is only available on devices using iOS 14+.

Consumer Goods Cloud

Added the See also links.

Receive Change Event Notifications for More Objects

Added information about new change event objects of Loyalty Management.

Loyalty Management

Changed Loyalty Console to Loyalty Management.

Use the Flexibility of the Optional Customer Property Field

Added a note that the Customer Property field in the Insurance Policy Asset object is now optional.

Metadata API

Added information about new metadata types: AIApplication, AIApplicationConfig, MLDataDefinition, and MLPredictionDefinition.

Prepare for Productive Conversations with the Meeting Digest

Clarified the feature is available shortly after all instances are upgraded to the Spring '21 release. Added information about availability in sandboxes.

Supercharge Virtual Events with Meeting Studio

Clarified the feature is available shortly after all instances are upgraded to the Spring '21 release. Added information about availability in sandboxes.

New Permissions for Creating Orders

Added information about new permissions required for creating orders.

Update to the Latest Telephony Integration API

Added information about a change to the Service Cloud Voice REST API and details about when the old API deactivates.

January 18, 2021

New Connect in Apex Input Classes

Added information about the `allOrNothingTransferId` property to the `OCITransferReservationInputRepresentation` class.

New and Changed Connect REST API Request Bodies

Added information about the `allOrNothingTransferId` property to the OCI Transfer Reservation Input request body.

Sync Custom Fields in Pardot Object Sync (Beta)

Added a table that outlines field-level changes to the Prospect and Activity dataset.

Track Accounts as Campaign Members (Beta)

Clarified the Where statement.

Understand the Long-Term Value of Each Lifecycle-Managed Asset

Corrected the information about where the field is available. It's available only in Lightning Experience with Salesforce Billing.

View Lightning Apps by Default

This feature isn't quite ready for showtime. We'll let you know when it's available.

Find Records in the Salesforce Mobile App Using Everyday Words (Beta)

This feature isn't quite ready for showtime. We'll let you know when it's available.

Filter Records Using Natural Language Search on Mobile (Beta)

This feature isn't quite ready for showtime. We'll let you know when it's available.

Increase Sales and Partner Collaboration on Rebates

Updated the screenshot of the Manufacturing Experience Cloud site home page.

Catch Potential Duplicates Before Saving

Added information on setting up duplicate rules and matching rules.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

Enforcement of this release update is postponed to Spring '22.

Manage Product Campaigns

Added information on setting up the Product Service Campaign Item related list on Product Service Campaign.

Debug the Template

Added information on using debug logs for Tableau CRM templates.

FHIR R4 Support for Better Interoperability

Clarified the number of objects mentioned in the new data model to specify how many of them are new objects.

Email-To-Case Update Enforcement Extended to Winter '22 Release

Enforcement of this release update is postponed to Winter '22.

Note the Change in the Learning Center

Added a clarification about a visual change in the Tableau CRM Learning Center.

Standardize Your Salesforce URLs with Enhanced Domains

Clarified that this feature is available on a rolling basis with Spring '21 and is available to all customers by March 31, 2021.

Use New ERP-Mapping Fields for Finance Transactions

Added information on new Billing fields for finance balance snapshots.

New and Changed Financial Services Cloud Object Fields

On the InsurancePolicy object, corrected the field name from TotalInsuredAmount to TotalSumInsured.

January 12, 2021

Loyalty Management

Added release notes for Loyalty Management.

January 11, 2021

You Asked for It!

Added Ideas that we delivered.

Get Search Results for More Objects

Added newly searchable objects for Manufacturing Cloud.

Get More from Tables in Tableau CRM for iOS

Added information about more efficient compare tables in Tableau CRM fo iOS.

Automatic Usage Summaries for Evergreen Usage-Based Subscriptions

Added information about Salesforce Billing creating usage summaries for evergreen usage-based subscriptions.

FHIR R4 Support for Better Interoperability

Updated information about support for new and future customers.

Added a link to the list of packaged EHR objects.

Removed information about availability of setup page for new customers.

REMOVED: Change Email Addresses and Reset Passwords Securely and Easily

Removed this release note because this change was removed from the Spring '21 release.

New and Changed Objects

Added a release note for the new `InterviewStatus` field on the FlowInterview object.

January 4, 2021

Intelligent Form Reader

Added note about language support for Intelligent Form Reader.

Metadata API

Added a description of the InventorySettings type.

Stop Messages Sent via Old Channels

Added information about where this change applies.

UI Changes for Lightning Web Components

Removed paragraph about a UI change involving a permissions error when editing a record. This change is listed as a Known Issue instead.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Added information about new Order Management and Omnichannel Inventory ConnectApi classes.

Connect REST API

Added information about new Order Management and Omnichannel Inventory Connect REST API resources.

New and Changed Components for Change Sets

Added a newly available change set component, Platform Event Subscriber Configuration.

Other Changes to the Policy Component

Replaced "hard-coded labels" with "static labels" in the description of the first item in the Why section.

December 18, 2020

Salesforce Spring '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 buttons 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.
- **Spring '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.
- **Spring '21 Release Website**. Check out the new features.
- **Spring '21 Release Highlights Module**. Get the Spring '21 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 Spring '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 that make 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 Tableau CRM	✅			

Salesforce Overall

Language throughout our product was updated to reflect inclusivity. Salesforce Release Notes moved to Salesforce Help for a more unified user experience. Recently Viewed lists have customizable actions. You can add images to your in-app guidance, and snooze guidance so you can see it later. Use new survey actions in a flow and target specific survey participants with invitation rules. Use the new Salesforce Scheduler trial org to get a head start on your implementation, and set default time zones for appointment slots. Search using everyday words with natural language search for Government Cloud and the Salesforce mobile app.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Inclusive Terms Are Replacing Legacy Language		✅		
Enjoy New Features and a Better User Experience with Release Notes on Salesforce Help			✅	
Browse, Buy, and Manage Your Products with Subscription Management App (Beta)			✅	
Protect Users from Insecure Downloads in Chrome			✅	
Rich Text Editors Get an Upgrade			✅	
Quickly Find Portal Users When Changing Record Owners	✅			
Catch Potential Duplicates Before Saving	✅			
UI Changes for Lightning Web Components	✅			
Keep Working with Tab-Focused Dialogs (Previously Released Update)			✅	
User Engagement				
Add Images to In-App Guidance		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Snooze In-App Guidance to See It Later	✅			
Choose from More Positions for Your Floating Prompts		✅		
Add Walkthrough Steps That Go Beyond New, Edit, and Clone Pages		✅		
Access Active In-App Guidance with Shareable URLs		✅		
Do More Rich Text Editing in Docked Prompts		✅		
Move Floating Prompts on an iPad	✅			
Learn About Salesforce In-App Content		✅		
Bring the Trailhead Learning Experience Inside the App (Beta)			✅	
Get Personalized Guidance While Setting Up Salesforce		✅		
Salesforce Surveys				
Schedule Surveys and More with New Actions Defined in a Flow	✅			
Target Specific Survey Participants Using Rules	✅			
Target Specific Survey Participants Using Rules in Customer Lifecycle Maps	✅			
Send Surveys Using an Alias	✅			
Embed a Survey in a Web Page	✅			
Validate Short-Text Responses from Participants	✅			
Show Participants the Survey Completion Status	✅			
Encrypt Responses in a Survey	✅			
Monitor Engagement Channel Performance and Improve Customer Experience	✅			
Salesforce Scheduler				
Preset a Time Zone for Time Slots			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set a Time Zone for Review Appointment Page			✅	
Schedule Appointments Across Time Zones			✅	
Filter Service Resources by Resource IDs			✅	
Make Changes on Previous Pages			✅	
Embed Salesforce Scheduler Flows			✅	
Modify Appointments via API			✅	
Schedule Appointments Faster with API Updates			✅	
Other Improvements			✅	
Search				
Einstein Search				
Benefit from AI-Powered Einstein Search in Government Cloud			✅	
Get Search Results for More Objects	✅			

Service

Get excited for a smarter Service Cloud. Dive into your Einstein Article Recommendation model in a new scorecard, and deliver data from standard and custom objects in Einstein Bots. Field Service streamlines the scheduling experience with point-to-point predictive routing, appointment matching for shifts, and alerts when your mobile worker arrives. With setup enhancements and new productivity tools in Service Setup Assistant, Service Cloud Voice, and Knowledge, you get more time to focus on your customers.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein for Service				
Einstein Bots				
Build Customer Trust with the Error Handler System Dialog	✅			
Scale Up Intent Models with Multi-Language Support for Input Recommender and Input Recommender for Intent Sets (Beta)	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Find Answers Fast with Article Answers (Pilot)	✅			
Supercharge the Template Bot with Included Intent Data (Beta)	✅			
Deliver Information from Records with Object Search (Beta)	✅			
Construct Bots Quickly with Dialog Cloning	✅			
Promote Utterances from Bot Training to Intent Sets	✅			
Build Intent Models with Fewer Utterances	✅			
Get Global with Bot Language Updates	✅			
Learn More About Your Bots with New Metrics	✅			
Increase Security with Shield Platform Encryption for Einstein Bots	✅			
Bot Options Menu Behavior Was Changed	✅			
Keep Conversations Secure: Bots HIPAA and SOC2 Compliance	✅			
Other Improvements to Einstein Bots	✅			
Einstein Article Recommendations				
Improve Accuracy with Insights from the Model Scorecard		✅		
Deliver Einstein Article Recommendations in Seven Languages (Generally Available)	✅			
Einstein Case Classification				
Control Einstein's Automated Actions with Precision		✅		
Einstein Reply Recommendations				
Enable Chat Agents to Respond in One of 16 Languages (Pilot)				✅
Start with Fewer Transcripts and Increase Replies		✅		
Einstein Voice Call Wrap-Up				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Complete Calls with Ease via Einstein Voice Wrap-Up (Pilot)				✅
Field Service				
Create Shifts Faster via Predefined Shift Patterns		✅		
Designate Shifts for Appointments that Meet Your Criteria		✅		
Add Shift Management to Your Experience Cloud Sites		✅		
Manage Product Campaigns	✅			
Deliver Customers Their Service Work Entitlement	✅			
See Who Provides or Services a Customer's Assets	✅			
See More Pricing Details on Product Consumed	✅			
Plan Ahead with Advanced Maintenance Recurrence	✅			
Record More Details About Maintenance Plans	✅			
Get More Details On Contract Line Items	✅			
PK Chunking Support Added for ProductConsumed and ProductRequired	✅			
Changes to the Self Service Permission Set			✅	
Field Service Scheduling				
Schedule Appointments During Shifts That Meet Your Criteria		✅		
Get Smarter Travel Time Estimates with Point-to-Point Predictive Routing		✅		
See Results with Improved Optimization Insights (Generally Available)		✅		
Field Service Mobile App				
Briefcase Builder (Beta)			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Notify Customers When Workers Are Arriving	☑			
Update the Status of Your Service Appointment on the Go			☑	
Service Setup Assistant	☑			
		Channels		
Voice				
Get Your Contact Center Up and Running Faster			☑	
Save Customers Time and Frustration with Queued Callback			☑	
Integrate Service Cloud Voice with High Velocity Sales			☑	
Collaborate on Call Recordings to Improve Customer Service	☑			
Give Agents Time for After-Conversation Work (Pilot)				☑
Link Calls to the Right Contact Record (Beta)	☑			
Scale Your Contact Center with Voice Resiliency and Increased Voice Platform Limits	☑			
See When Updates Are Available for Your Contact Center			☑	
See When Your Key Pair Expires			☑	
Introducing New Service Cloud Voice Documentation	☑			
Update to the Latest Telephony Integration API			☑	
Warm Up Your Lambda Functions and Get Real-Time Transcription in More Languages in Voice		☑		
Messaging				
Boost Your Messaging Templates with More Metadata			☑	
Stop Messages Sent via Old Channels			☑	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
IsOptedOut Is Being Retired			✅	
Knowledge				
Use the Service Setup Assistant to Configure Knowledge			✅	
Point Your Favorites to the Latest Versions of Articles			✅	
Retain Attached Files When Inserting an Article into an Email			✅	
Add Alt Text to Images in Lightning Knowledge			✅	
Routing				
Give Your Agents Time to Complete the Conversation (Pilot)				✅
Case Management				
Customize Your Default No-Reply Address for Email Notifications			✅	
Keep Profiles Safe from Prying Eyes with Profile Filtering for Interaction Layout Assignment			✅	
Integrate with Entitlements to Supercharge Your Org			✅	
Enhance Your Workflow with Tab Switching in the Macro Builder	✅			
Email-To-Case Update Enforcement Extended to Winter '22 Release		✅		
BCC Hidden from Salesforce Experience Users			✅	
Other Changes				
Shield User Profile Information from Prying Eyes in CTI	✅			
See Only Relevant Subscription Products in Amendment and Renewal Quotes	✅			

Sales

Salesforce Meetings helps sales teams prepare for meetings and engage attendees. High Velocity Sales users can use Einstein Conversation Insights with video calls, track the opportunities and revenue that result from sales cadences, and retire sales cadences without losing the data. Adjust forecasts on the go with the Salesforce mobile app. Track when emails are temporarily undeliverable, and test and share email templates.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Meetings				
Prepare for Productive Conversations with the Meeting Digest			✅	
Supercharge Virtual Events with Meeting Studio			✅	
High Velocity Sales				
Einstein Conversation Insights				
Einstein Call Coaching Is Now Einstein Conversation Insights	✅			
Use Conversation Insights with Video Calls			✅	
Create and Share Call Collections	✅			
Access Video Call Data in Conversation Insights Dashboards	✅			
Use Sales Cadences to Advance Opportunities and Track Target Engagements			✅	
Retire Sales Cadences Without Losing Their Data			✅	
Specify Who Can Change Target Assignees			✅	
Get More Details About Sales Cadence Performance			✅	
Sales Cloud Einstein				
Enable Einstein Opportunity Scoring with Less Data		✅		
Store Included Fields Instead of Excluded Fields in Einstein Lead Scoring			✅	
Core Sales Features				
Collaborative Forecasts				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Adjust Your Forecasts on the Go	✅			
Opportunities				
Do More with Opportunity Products		✅		
Leads				
Convert Leads to a Person Account and a Business Account at the Same Time with the API			✅	
Campaigns				
Track Accounts as Campaign Members (Beta)			✅	
Lead/Contact ID Label Was Changed				
Orders				
Configure Order Save Behavior in 2GP and Unlocked Packages	✅			
Other Changes in Core Sales Features				
Original Territory Management Is Being Retired		✅		
Productivity Features				
Email Experience				
Make Sure Emails Get Delivered with Soft Bounce Email Handling	✅			
Monitor More Changes in the Setup Audit Trail			✅	
Use Send Later with Threaded Emails	✅			
Add Zoom Meeting Links to Events Created Using Insert Availability			✅	
Email Templates				
Distribute Lightning Email Templates with Packaging and Change Sets		✅		
Use Lightning Email Templates in Salesforce Automations		✅		
Save Time with Duplicate Components in Email Template Builder	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Optimize Email Management	✅			
Einstein Activity Capture				
Add Profiles to Einstein Activity Capture Configurations		✅		
Customize Field Mappings for Contact and Event Sync		✅		
Sync Internal Events				✅
Salesforce Inbox				
Inbox Mobile App	✅			
Calendar				
Create Shared, Public, Resource, and User List Calendars from the API		✅		
Dialer				
Lightning Dialer Is Now Sales Dialer	✅			
Integration with Google				
Gmail™ Integration				
Legacy Version of the Inbox Chrome Extension for Gmail Is Being Retired March 31, 2021			✅	
Make Logging Easier with Improved People Matching in the Gmail Integration			✅	
Profile Event Type Pick List Respected When Logging Events from the Gmail Integration			✅	
Add Zoom Meeting Links to Events Created with Insert Availability in the Gmail Integration with Inbox			✅	
Get a More Accurate View of Emails Sent from Gmail Integration with Inbox			✅	
Lightning Sync for Google				
Scope Out the Latest on Syncing with Google Applications			✅	
Integration with Microsoft®				
Outlook® Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending			✅	
Legacy Version of the Inbox Outlook Add-In Is Being Retired March 31, 2021			✅	
Make Logging Easier with Improved People Matching in the Outlook Integration			✅	
Profile Event Type Pick List Respected When Logging Events from the Outlook Integration			✅	
Add Zoom Meeting Links to Events Created with Insert Availability in the Outlook Integration with Inbox			✅	
Get a More Accurate View of Emails Sent from Outlook Integration with Inbox			✅	
Lightning Sync for Microsoft® Exchange®				
Scope Out the Latest on Syncing with Microsoft Applications			✅	
Required Setting Changes for Some Microsoft Office 365 Customers			✅	
Salesforce for Outlook				
Salesforce for Outlook Is Being Retired Between Summer '21 and June 2023			✅	
Restore Access If Service Is Interrupted			✅	
Find Version-Specific Salesforce for Outlook Release Notes			✅	

Revenue

Salesforce CPQ improvements include smoother amendment and renewal service upgrades, background contract amendments, and a change ensuring correct price rule configuration. With Salesforce Billing, configure how invoice lines are created when you use a bill through date override, and map financial information to customer accounting and enterprise resource planning (ERP) systems. You can also highlight the long-term value of a lifecycle-managed asset. Standalone order activation and product creation logic are improved. And Advanced Approvals users can manage their approvals without logging in to Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce CPQ				
Make a Smooth Switch to the Large-Scale Amendment and Renewal Service		✅		
Continue Working While You Amend Contracts			✅	
Configurator Evaluation Event Field Added to the Price Rules Page Layout			✅	
Contract Larger Orders in Less Time	✅			
New Permissions for Creating Orders	✅			
Permission Set Requirement Was Added for Contract Amendment and Renewal			✅	
Salesforce Billing				
Create Partial Periods When Using a Bill Through Date Override	✅			
Use New ERP-Mapping Fields for Finance Transactions	✅			
Understand the Long-Term Value of Each Lifecycle-Managed Asset			✅	
Standalone Order Activation Logic Was Updated	✅			
Standalone Order Product Creation Logic Was Updated	✅			
Automatic Usage Summaries for Evergreen Usage-Based Subscriptions	✅			
Advanced Approvals	✅			

Industries

An unprecedented wave of new vertical solutions awaits you. Loyalty management helps you run personalized customer recognition, reward, and retention programs. Batch management lets you process and track millions of records. With decision tables, you can define multiple business rules to evaluate products and calculate discounts. Our new data processing engine extracts and transforms data from your org and creates records with the transformed data. It's easier to manage sales agreements and account forecasts in Manufacturing Cloud, and Rebate Management supports volume-, revenue-, and growth-based rebate programs. Meanwhile, Health Cloud makes provider management easier with a new API and new FHIR-aligned support for electronic health records, and Financial Services Cloud helps you track branch performance and capture life events and business milestones on the go. Consumer Goods Cloud makes store

visits and deliveries smarter, while Public Sector Solutions adds calendar support and makes application approval more transparent. Emergency Response Management adds updated flows to improve your emergency response experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Loyalty Management				
Build a Unique Loyalty Experience with Loyalty Program			✅	
Drive Your Business Goals with Promotions			✅	
Increase Your Member Engagement with Loyalty Program Partners			✅	
Reward Members with Experiential Vouchers	✅			
Delight Your Members with Loyalty Benefits	✅			
Let Members Track Activities with the Loyalty Member Portal			✅	
Analytics for Loyalty				
Analyze Customer Loyalty and Grow Your Business	✅			
Improve Member Engagement with Einstein Discovery for Loyalty	✅			
Loyalty Management New Objects		✅		
Loyalty Management Has New Metadata Types		✅		
Apex: New Items				
Connect REST API		✅		
Loyalty Management Has New Invocable Actions		✅		
Batch Management				
Define Jobs to Process Large Record Volumes		✅		
Schedule Your Jobs		✅		
Watch Your Batch Jobs		✅		
Share Your Batch Management Jobs		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Batch Management Has a New Object		✅		
Batch Management Has New Tooling API Objects		✅		
Batch Management Has a New Platform Event		✅		
Batch Management Has a New Invocable Action		✅		
Batch Management Has New Metadata Types		✅		
Monitor Workflow Services Has New Objects		✅		
Decision Tables				
Define Your Business Rules		✅		
Specify the Rules and Automate the Rest		✅		
Determine the Outcome for Records from Multiple Sources		✅		
Invoke a Decision Table from a Flow		✅		
Update Your Business Rules Anytime		✅		
Share Decision Tables		✅		
Keep Your Business Rules Safe		✅		
Decision Table Has New Objects		✅		
Apex: New Items				
Connect REST API		✅		
Decision Table Has New Invocable Actions		✅		
Decision Table Has New Metadata Types		✅		
Data Processing Engine				
Transform Data with a Few Clicks		✅		
Provide Your Own Inputs While Transforming Data		✅		
Run Data Processing Engine on Your Terms		✅		

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Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Your Data Processing Engine Runs		✅		
Write Back Results to Salesforce Shield Encrypted Fields		✅		
Save Time with Template Data Processing Engine Definitions		✅		
Share Data Processing Engine Definitions with Other Orgs		✅		
Track Your Data Processing Engine Usage		✅		
Data Processing Engine Has New Objects		✅		
Data Processing Engine Has New Tooling API Objects		✅		
Data Processing Engine Has a New Invocable Action		✅		
Data Processing Engine Has New Metadata Types		✅		
Data Processing Engine Has a New Platform Event		✅		
Monitor Workflow Services Has New Objects		✅		
Manufacturing Cloud				
Introducing the Customer 360 Guide for Discrete Manufacturing				
Solve Cross-Cloud Solutions with Salesforce Solution Kits			✅	
Convert Quotes and Opportunities to Sales Agreements			✅	
Consider Opportunity Schedules in Account Forecasting			✅	
Unclutter Your Sales Agreements List			✅	
New Manufacturing Cloud Metadata Type		✅		
Connect REST API		✅		
Rebate Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Define Rebate Programs to Easily Calculate Rebate Amounts			✅	
Gain New Insights with Enhanced Rebate Processing			✅	
Increase Sales and Partner Collaboration on Rebates			✅	
Analyze Rebate Programs and Boost Your Business with Rebate Analytics	✅			
Health Cloud				
Create Provider API			✅	
Interoperability				
FHIR R4 Support for Better Interoperability			✅	
Run Reports on the FHIR R4-Aligned Data Model			✅	
Intelligent Document Automation				
Create Action Plans Automatically			✅	
See Transformed Pages			✅	
Intelligent Form Reader				
Resolve Unclear Field Values in Received Documents			✅	
Intelligent Sales				
Track Visits on the Salesforce Calendar			✅	
Choose from Account Types in the Analytics for Healthcare App				
Share Vaccine Information with Vaccine Eligibility Packages			✅	
Health Cloud Has New and Changed Objects		✅		
Financial Services Cloud				
Branch Management				
Capture Branch Hierarchies and Members with the Branch Data Model			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Define Branches and Members in the Branch Management Console			✅	
Set Your Branch Context with the Branch Selector			✅	
Track Account and Lead Creation with Automatic Branch Association (Beta)			✅	
Improve Branch Operations in the Analytics for Retail Banking App			✅	
Insurance for Financial Services Cloud				
Capture Events and Milestones on the Go			✅	
PK Chunking for Policy and Claim Objects			✅	
Policy Component Enhancements			✅	
Analytics for Insurance				
Actionable Relationship Center (ARC)				
View Record Participants in ARC			✅	
Changes to Related Lists in ARC			✅	
Interaction Summaries				
Capture and Share Interaction Summaries			✅	
Compliant Data Sharing				
Share Records with Participant Groups			✅	
Allow Non-Owners to Share Records			✅	
Share Interaction Summaries in a Compliant Manner			✅	
Intelligent Form Reader				
Automate Financial Data Capture Using Mappings			✅	
Extract Information from Uploaded Documents			✅	
Rollups				
Rollup-by-Lookup Using Data Processing Engine			✅	
Optimize Record Rollups (GA)	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Optimized Record Rollup Triggers	✅			
Other Financial Services Cloud Changes				
Drive Client Engagement with Life Event Insights				
Stay Productive with More Financial Services Cloud Lightning Components for Mobile	✅			
Use the Flexibility of the Optional Customer Property Field			✅	
New and Changed Financial Services Cloud Object Fields		✅		
New Financial Services Cloud Metadata Types		✅		
Consumer Goods Cloud				
Einstein for Consumer Goods Enhancements				
Plan the Right Tasks for a Visit with Einstein Visit Task Recommendation			✅	
Get Visit Recommendation Using Predictions			✅	
Use Einstein for Consumer Goods with Lightning Retail Execution Starter License			✅	
Plan Store Deliveries Better with Controlled Vehicle-User Assignments			✅	
Access Visit and Order Details on the Retail Store Page			✅	
Visit Execution Enhancements				
Serve Stores Better by Creating Tasks on the Fly	✅			
Streamline Task Execution with Task and KPI Sequencing	✅			
Stay Organized with Assigned Tasks	✅			
Analytics for Consumer Goods				
Monitor Store Price Compliance with Analytics for Consumer Goods	✅			
Analyze Store Performance and Increase Sales with Einstein Discovery	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other Changes to Consumer Goods Cloud	✅			
Consumer Goods Cloud Has New Objects		✅		
Consumer Goods Cloud Has a New Invocable Action		✅		
Connect REST API		✅		
Public Sector Solutions				
View Regulatory Fees When Applying for a License or Permit			✅	
View Scheduled Visits on the Salesforce Calendar			✅	
Improve the Inspection Experience with the Inspection Management Mobile App				
Efficiently Perform Inspection Tasks			✅	
Stay Informed during a Site Visit			✅	
Track and Manage Complaints Better with Public Sector Site Enhancements			✅	
New Objects in Public Sector Solutions			✅	
Emergency Response Management				
Capture Date and Time in Contact Collection Flows			✅	
More Information About Communities User Licenses for Industries			✅	

Analytics

Fast-track important business decisions with an improved Lightning Experience report builder, save time building and managing dashboards with reusable components, and find insights in a flash with a redesigned Einstein Discovery interface.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Streamline Report Creation with Multi-Field Selection	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Dashboard Results with Filter URL Parameters	✅			
Get Report Details Emailed in .xlsx Format	✅			
Enable Enhanced Folder Sharing (Update, Postponed)			✅	
Tableau CRM				
Einstein Analytics Is Now Tableau CRM		✅		
Data Integration and Preparation				
Keep Salesforce Data Fresh in Snowflake with Sync Out (Generally Available)	✅			
Export Datasets to .csv with the Data Prep Output Node	✅			
Merge Prepared Tableau CRM Data into Salesforce with the Salesforce Output Connector (Beta)			✅	
Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Beta)			✅	
Tighter Security Encryption Requirements for Connected Data Sources	✅			
Identify More Candidates for Simplified Row-Level Sharing with the Improved Sharing Inheritance Coverage Assessment	✅			
Perform Calculations Across Rows with Window Functions	✅			
Stay Ahead of the Game with the Smart Transform Pilot Program			✅	
Anticipate the Future with Time Series Forecasting (Pilot)			✅	
Find New Ways to Segment Your Data with Clustering (Pilot)			✅	
Analyze Aggregated Data from More Angles with Pivoting (Pilot)			✅	
Clean Up Your Data by Standardizing Column Value Formats	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Append Rows from Disjoint Data Sources	✅			
Other Enhancements to Data Prep	✅			
Run Recipes and Dataflows Smarter with Priority Scheduling	✅			
Prebuilt Templates and Apps				
Review Your Team's Activities to Support Better Win Rates	✅			
Win More Accounts With Einstein Discovery Modeling	✅			
Focus Your Sales Efforts By Understanding the Top Revenue Forecast Drivers	✅			
App Building				
Be the Boss of Building Dashboards with Reusable Components (Generally Available)	✅			
Add Custom Text and Visualizations in Number Widget Tooltips	✅			
Take Action Anywhere on Any Data on up to 100 Records at Once		✅		
Use SQL with Tableau CRM Direct Data (Beta)			✅	
Group Data by up to Six Fields in Explorer	✅			
What's New In SAQL		✅		
Einstein Discovery				
Discover More Insights with a Reimagined, Intuitive Interface				✅
Embed Predictions in Your Dataset During Data Prep (Generally Available)				✅
Implement External Models in Your Salesforce Org (Pilot)				✅
Gain Better Insights Into Your Report Data with Enhanced Einstein Data Insights				✅
Package, Promote, and Distribute Your Predictions				✅

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Accurate Models Using Random Forest Algorithms (Generally Available)		✅		
Maintain Model Accuracy With Performance Notifications				✅
Increase Prediction Transparency with Model Cards (Pilot)				✅
Impute Missing Values to Improve Model Performance (Pilot)				✅
Get Better Predictions with Typographic Fuzzy Matching (Pilot)				✅
Get Automated Model Deployment and Dataset Scoring with Templated Apps				✅
Save Time in Setup with Automatic Enablement Upon License Activation				✅
Get Einstein Predictions in Tableau Using Custom Table Calculations				✅
Manage Model Versions with Version History				✅
Capture Story Version Details While They're Fresh				✅
Get Enhanced Performance in Your Einstein Discovery Stories				✅
Tableau CRM for Everyone				
Control Which Analytics Tab Users Access the Analytics Studio		✅		
Control Who Sees What in an App with Asset Visibility (Beta)				✅
Enable Notifications and Subscriptions in Embedded Dashboards		✅		
Arrange Subscription Emails Your Way	✅			
Note the Change in the Learning Center	✅			
Get More from Tables in Tableau CRM for iOS	✅			
Get the Latest Version of Tableau CRM for iOS	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get the Latest Version of Tableau CRM for Android	✅			
Salesforce Data Pipelines				
Enrich Salesforce Data at Scale with Salesforce Data Pipelines			✅	

Commerce

Our new Omnichannel Inventory service unlocks the power of-real-time inventory availability for B2C Commerce and Salesforce Order Management. B2B Commerce provides enhancements to make it easier for you to work with Commerce data and manage your products, and to configure checkouts and integrations. Salesforce Order Management introduces new flow core actions and expanded support for B2C Commerce custom data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Omnichannel Inventory				
Get Inventory Availability and Manage Reservations with Headless APIs	✅			
View Inventory Availability and Manage Locations with the Omnichannel Inventory Console	✅			
Enhance the Shopping and Order Experience with B2C Commerce and Salesforce Order Management Integrations	✅			
Use Omnichannel Inventory Features in Flows	✅			
B2B Commerce for Lightning Experience				
Commerce App				
Add Sample Data to Your Store			✅	
Use Store Interaction Data to Build Insightful Reports		✅		
Increase Visibility with Guest Browsing		✅		
Pick Up New Products in Sitemap Incremental Updates			✅	
Retain Workspace List Settings	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Product2 Sharing Rules to Share B2B Commerce Data with Guests		✅		
B2B Commerce Template				
Use Reference Components to Guide Your Custom Component Development		✅		
Lists Are Generally Available	✅			
Hide the Add to List Button				
View Variation Parent Product Details on the Product Page		✅		
View Variation Attributes on the Product Page		✅		
Product Variations and Attributes				
Give Buyers More Product Options with Variations and Attributes			✅	
View Parent Classes from the Product Workspace			✅	
Get Guidance to Set Up and Configure Variations and Attributes			✅	
Checkout and Integrations				
Create Adaptable Checkouts with Synchronous Integrations		✅		
Manage Integrations with Integration Tabs			✅	
Update Your Delivery Method Component		✅		
Salesforce Order Management				
Use New Order Management Routing Features in Flows	✅			
Integrate Custom Shipment Data from B2C Commerce	✅			
Integrate Custom Shipping Item Data from B2C Commerce	✅			

Experience Cloud

Spring '21 brings a fresh start for Community Cloud with a brand new name—Experience Cloud. As part of that refresh, we updated the tools you use to build your sites and made several terminology and documentation changes. The Build Your Own (LWR) template is now generally available and includes support for Salesforce CMS content. And we added enhancements to several Lightning components.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Hello Experience Cloud, Farewell Community Cloud	✅			
Lightning Components in Experience Builder				
Add or Remove Drop Shadows in the Tile Menu Component		✅		
Give Access to Related List - Single on Mobile Sites with the Revamped Component		✅		
Developer Productivity				
Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)				
ExperienceBundle Enabled by Default for Build Your Own (LWR) Sites		✅		
Maintain Continuity with the Customizable Service Not Available Page (Pilot)				✅
Use a Single Certificate Domain for Your Content Delivery Network (Pilot)		✅		
Add Salesforce CMS Content to Custom Lightning Web Components		✅		
Lightning Message Service Now Supported in Experience Cloud (Beta)		✅		
lightning:navigation in Aura Sites Now Supports generateUrl with More actionNames		✅		
Navigate to CMS Content Pages Using a PageReference		✅		
Guest User				
View All, Modify All, Edit, and Delete Object Permissions Removed for Guest Users		✅		
Obsolete Permissions from Guest User Profiles Were Removed		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Security and Sharing				
Users with Standard External Profiles Can No Longer Log In To Experience Cloud Sites		✅		
Set Preferences for Allowed Cookies for Experience Builder Sites		✅		
Hide First and Last Name Fields in SOAP API for Experience Cloud Site Users		✅		
Other Changes				
Hide Fields in Lightning Knowledge Search Results			✅	
Add Multiple Files to Records in the Experience Cloud Sites on Mobile		✅		
Process Members More Smoothly with Enforced Limits			✅	
Merge Customer-Enabled Person Accounts			✅	
Build Reports on Question Response Time		✅		

Salesforce CMS

Do more with your Salesforce CMS content than ever before. Deploy consistent content using content key, add it to the new Build Your Own (LWR) template for Experience Builder sites, and export it to other orgs and workspaces.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Keep Things Consistent with Content Key		✅		
Use the Content Key to Reference Media for Import		✅		
Bulk Publish Content After Import		✅		
Export Content from Your Salesforce CMS Workspace		✅		
Deploy CMS Content and Components from Sandbox to Production		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Mixed Content Downloads Blocked in Google Chrome		✅		
Take Advantage of the Build Your Own (LWR) Template for Experience Cloud		✅		
Use Your Salesforce CMS Content in Custom Lightning Web Components		✅		
Add CMS Images with the Rich Content Editor in the Build Your Own (LWR) Template		✅		

Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for iOS and natural language search on mobile. Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud and comes with iPad support.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
Salesforce Mobile App Requirements Have Changed	✅			
Get Comfortable in Mobile Home (Beta)			✅	
Tap Into Salesforce from Your Home Screen with the Quick Navigation Widget	✅			
Improved Scrolling is the New Standard	✅			
Keep Track of Your Activities with Activity Timeline on Android	✅			
Use Dynamic Actions with Custom Objects on Mobile			✅	
Get Ready for Changes to Apple's Privacy Policy	✅			
New Enhanced Mobile Security Setup UI (Beta)				✅
Protect Your Data with Enhanced Mobile Security Updates				✅

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Lightning Page Performance on Mobile		✅		
Turn on the New Salesforce Mobile App Tablet Experience			✅	
App Store and Google Play Updates	✅			
Mobile Publisher				
Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud			✅	
Mobile Publisher for Experience Cloud iPad Support (Generally Available)			✅	
Managed Public Distribution No Longer Supported for Android			✅	

Sustainability

Resolve issues with your carbon footprint record data with Data Gap Filling. Individually lock or unlock energy use records with Individual Locking Control.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Resolve Carbon Footprint Record Issues with Data Gap Filling			✅	
Manage Energy Use Records with Individual Locking Control			✅	

Customization

Access prior record values and reduce automation time and maintenance costs with Salesforce Flow. Build recommendations and predictions confidently and easily with improvements to Einstein Recommendation Builder and Einstein Prediction Builder. Configure more flexible and better-performing Lightning pages in the Lightning App Builder.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Flow				
Lightning Flow Is Now Salesforce Flow		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder				
Refer to the Prior Values of the Record That Triggered Your Flow		✅		
Run Part of a Record-Triggered Flow After the Triggering Event		✅		
Send Rich Text Emails from Your Flow Using a Send Email Action		✅		
Build Multicolumn Screens in Flow Builder (Beta)		✅		
Control Revisited Screen Component Values in Flows		✅		
Avoid Callout Errors in Screen Flows Automatically		✅		
Enjoy Improved Styling for Flow Screen Components		✅		
Avoid Repetitive Lightning Runtime Warnings in Screen Flows		✅		
See Less {!Complex.Syntax} in Flow Builder		✅		
View Flow Label in Browser Title from Debug or Flow Runtime		✅		
Access Complex Merge Fields from Loops		✅		
Discover Issues with Send Email Actions Earlier		✅		
Flow Debugging				
Debug Failed Flows More Easily		✅		
Debug Flows More Easily with Consistent Terms and Direct Debugging for Schedule-Triggered Flows		✅		
See Accurate Flow Information in Debug Logs		✅		
Flow Management				
Delete a Flow Version Installed from a Package Without Uninstalling the Package		✅		
Flow and Process Extensions				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Invocable Actions in Flow Builder More Easily with Custom Property Editors (Generally Available)		✅		
Access More Output Values from Flow Builder Custom Property Editors		✅		
Flow and Process Release Updates				
Enable Partial Save for Invocable Actions (Update, Enforced)			✅	
Enforce Data Access in Flow Merge Fields (Update, Postponed)			✅	
Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Enforced)			✅	
Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)			✅	
Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released Update)			✅	
Accurately Measure the CPU Time Consumption of Flows and Processes (Update)			✅	
Analyze Screen Flow Usage (Update)			✅	
Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)			✅	
Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)			✅	
Flow and Process Run-Time Improvements in API Version 51.0		✅		
Einstein Builders				
Validate Your Recommendations with Data Checker (Generally Available)			✅	
Enjoy Easier Access to Your Recommendations (Generally Available)			✅	
Build Predictions for Managed Packages			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Retry Building a Failed Prediction			✅	
Lightning App Builder				
Define Localized Component Labels and Attribute Values on Lightning Pages Using Custom Labels		✅		
More Support for Dynamic Actions			✅	
Analyze Performance For Lightning Pages Viewed on a Phone		✅		
Get More Detailed Information About Your Lightning Page Performance on Desktop		✅		
Get Tips for Phone-Enabled Lightning Pages in Guidance for App Builder		✅		
Collapse and Expand Field Sections on Dynamic Forms-Enabled Pages		✅		
Globalization				
Differentiate Between the Onshore and Offshore Yuan			✅	
Read Hebrew Right to Left in More Clouds	✅			
Connect with Customers Who Speak and Read Amharic			✅	
Enable ICU Locale Formats (Previously Released Update)			✅	
External Services				
Legacy External Services Version Is Being Retired		✅		
Include Top-Level Named Array Definition for List Types in Your External Services Schemas		✅		
Salesforce Connect				
Configure Multiple Salesforce Connect Licenses in a Scratch Org		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reauthenticate After Editing Certain Fields of a Named Credential or External Data Source		✅		
Fields				
Improve Performance with Limits on Inactive Picklist Values		✅		
Get More Characters for Field-Level Help Text		✅		
Disable Rendering of HTML in Custom Fields Labels (Update, Enforced)		✅		
Profiles and Permissions				
Convert the Read Only Standard Profile to a Custom Profile (Update)			✅	
The Read Only Profile Is No Longer Available in New Salesforce Orgs		✅		
Use Integration Permission Sets to Exchange Data with Integration Partners		✅		
Sharing				
Share Records with Manual Sharing	✅			
Create More Roles		✅		
Custom Metadata Types				
View Custom Metadata Type Limits from the System Overview Page		✅		
Access Custom Metadata Type Records Using Static Methods		✅		
General Setup				
Require the View All Lookup Record Names Permission		✅		
Require Permission to View Record Names in Lookup Fields (Update, Retired)			✅	
Get More Predictable Target Behavior for Non-External Hyperlinks			✅	

Security and Identity

Simplify web session management with OAuth 2.0 updates. Manage My Domains more easily. New datasets help you analyze usage across Salesforce in the Event Monitoring Analytics app. And Security Center offers more hands-on ways to view your security data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identity and Access Management				
Enable Hybrid Apps to Directly Manage Web Sessions		✅		
Require the Client Secret during the Refresh Token Flow		✅		
Reduce Hybrid Mobile App Session Interruptions with a New Frontdoor.jsp Parameter		✅		
Get More Guidance from the Multi-Factor Authentication Assistant			✅	
Monitor Login Metrics for Your Org's Identity Services			✅	
Monitor How Your Identity Providers Authenticate Your Users with Authentication Method Reference		✅		
Easily Integrate Larger Access and Refresh Tokens for OpenID Connect		✅		
Identity Confirmation Is Now Device Activation	✅			
Manage Access to Login Flows with Profile Filtering			✅	
Domains				
Manage My Domain with Ease		✅		
Improve Connectivity with Salesforce Edge Network			✅	
Test Custom Domains in a Sandbox (Generally Available)			✅	
Stop Redirects from Previous My Domain URLs		✅		
Enable HTTPS on Your Domains			✅	
Deploy a My Domain (Previously Released Update)			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Retired)		✅		
Salesforce Shield				
Shield Platform Encryption				
Encrypt Utterance Data for Bots			✅	
Encrypt More Data Faster with Background Encryption			✅	
Encrypt Information Submitted in Surveys			✅	
Event Monitoring				
Analyze More Events in the Event Monitoring Analytics App		✅		
Default Answers Changed in Analytics App Setup Wizard		✅		
Automate Real-Time Event Monitoring Setup with Metadata API		✅		
Locate Users in All Lightning Event Types		✅		
Get Information About Commerce Events in the EventLogFile		✅		
Track Identity Providers for Authentication Requests		✅		
Get Information About Lightning Component Requests in the EventLogFile		✅		
Filter on User ID for User's Report Activity (Beta)		✅		
Security Center				
Update Metric Data On-Demand			✅	
See Historical Health Check Details in Security Center			✅	
Spotlight Change with Improved Detail Page Charts			✅	
Other Changes				
Require Secure HTTPS Connections for All Third-Party Domains		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assign Records Created by Site Guest Users to a Default User		✅		

Customer 360 Truth

Learn what's new with Single Source of 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				
See What's New with Customer 360 Audiences	✅			
Customer 360 Data Manager				
See What's New with Customer 360 Data Manager	✅			
Customer 360 Identity				
Identity for Customers and Partners Was Renamed to Customer 360 Identity	✅			
Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Postponed)			✅	
Customer 360 Privacy Center				
Monitor Data Subject Access Request Fulfillment with the Portability Log		✅		
Customer 360 Privacy Center Behavior Change: Portability Files Older Than 60 Days Are Automatically Deleted		✅		
Sync Consent Data Across Multiple Records		✅		

Deployment

To use Ant Migration Tool version 51.0, install Java version 11 or later.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Components for Change Sets		✓		
Ant Migration Tool Requires Java Version 11 or Later		✓		

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 Components				
Customize Markers and Control Map Behavior in lightning-map Base Component		✓		
DOM API Changes May Require UI Test Updates		✓		
Aura Components in the ui Namespace Are Being Deprecated			✓	
Create Flow Builder Custom Property Editors That Access Automatic Outputs		✓		
Lightning Web Components Playground Retired		✓		
Release Updates				
Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Enforced)			✓	
Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Enforced)			✓	
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)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Secure Static Resources for Lightning Components (Update, Postponed)			✅	
Create a Lightning Web Component Action (Pilot)			✅	
Einstein Vision and Language				
Einstein Vision and Language Are HIPAA Compliant		✅		
Einstein Vision				
Use Einstein OCR to Detect Text in PDFs (Beta)		✅		
Detect More Text with Einstein OCR		✅		
New Field in Vision API Training Status Response		✅		
Use Einstein OCR to Detect Text in Common Forms		✅		
Einstein Language				
Einstein Intent Support for More Languages Generally Available		✅		
Create an Einstein Intent Model with Less Data		✅		
New Field in Language API Training Status Response		✅		
Salesforce Functions (Beta)		✅		
Visualforce				
Securely Call the Visualforce Remoting API (Update)		✅		
Prevent Consecutive API Navigation Calls in Visualforce Pages (Previously Released Update)		✅		
Apex				
Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Beta)		✅		
Use BatchApexErrorEvent Triggers to Monitor ISV Applications		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Custom Property Editors for Invocable Actions (Generally Available)		✅		
Free Platform Cache for Managed Packages (Generally Available)		✅		
Flag Invocable Apex Methods That Make Callouts		✅		
Query Cursors Optimized for Improved Performance		✅		
Convert Leads to a Person Account and a Business Account at the Same Time with New LeadConvert Methods			✅	
Named Credential Callouts in Anonymous Blocks Require Customize Application Permission		✅		
API				
OpenAPI 3.0 Specification (Pilot)			✅	
Advance Notice of Upcoming Retirement of Platform API Legacy Versions			✅	
Packaging				
Target a Specific Release for Your Packages During Salesforce Release Transitions				✅
Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages (Generally Available)		✅		
Remove Metadata Components from Second-Generation Managed Packages (Pilot)				✅
Monitor Packaging Operations with New API Fields				✅
Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update)				✅
Specify Unpackaged Metadata for Package Version Creation Tests (Generally Available)				✅

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Scratch Orgs				
Create Scratch Orgs with More Features		✅		
Install and Use the B2B Commerce for Visualforce More Easily in a Scratch Org		✅		
Sandboxes				
Fine-Tune Your Data Security with Data Mask		✅		
Track Changes Between Your Local Project and a Sandbox (Generally Available)		✅		
Platform Development Tools				
Develop Customer 360 Platform Apps with Ease		✅		
Lightning Design System				
BEM Notation with Double Dashes Is Being Deprecated		✅		
Lightning Design System Component Blueprint Updates		✅		
AppExchange Partners				
Analyze Your Apex Custom Code with AppExchange App Analytics				✅
Submit Your Solution Faster and Track Progress with the Redesigned AppExchange Security Review	✅			
Update Your AppExchange Payment Information Quickly	✅			
Change Data Capture				
Enrich Change Event Messages with Extra Fields (Generally Available)		✅		
Receive Change Event Notifications for More Objects		✅		
Platform Events				
Configure the User and Batch Size for Your Platform Event Trigger		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Standard-Volume Platform Events Are Now Published Asynchronously		✅		

Salesforce Anywhere (Quip)

Say hello to the expanded Salesforce Anywhere, which now includes all the features you know and love from Quip for Customer 360. Learn about the latest updates to Salesforce Anywhere Beta features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
When to Expect Salesforce Anywhere Features	✅			
Quip for Customer 360 Is Now Salesforce Anywhere Advanced	✅			
Get Up and Running Faster with Salesforce Anywhere Setup	✅			
Share Your Company's Custom Templates at Scale (Template Library)	✅			
Create a Document from Anywhere (Document Creation in Salesforce)	✅			
Make Your Templates Dynamic with Templated Salesforce Data Mentions	✅			
Define Sections of a Template with Document Ranges	✅			
Update Document Ranges, Lock Sections, and Export Documents to PDFs with Salesforce Flow	✅			
Quip Slides Is Being Retired	✅			
Add Salesforce Data Mentions on iOS, See a Document's Linked Salesforce Records from the All Files View, and Other Enhancements	✅			
Access Alerts More Easily in Lightning Experience (Beta)	✅			
Subscribe to Alerts Faster (Beta)	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Hear the Salesforce Anywhere Message Tone (Beta)				
Catch Up on Released Beta Features	✅			

Pardot

Set up Pardot faster, maintain engagement data streams with First-Party Tracking, and enjoy enhanced functionality in email personalization, deliverability, and reporting. We improved clone actions too, so you can easily copy email content or new asset types associated to your campaigns.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Campaigns and Assets				
Quickly Clone Campaigns with Related Assets	✅			
Track Accounts as Campaign Members (Beta)			✅	
Organize Campaigns by Business Unit				
Secure Your Webex Webinars			✅	
Email Marketing				
Boost Your Email Marketing Retention with Two-Click Unsubscribe	✅			
Analyze Email Content Performance with Custom Reports	✅			
Clone an Email Content Record to Save Time	✅			
Specify a Link for Completion Actions in Pardot Emails	✅			
Add Alternate Reply-To and Email Senders to Pardot Emails	✅			
View the Number of Mailable Prospects in When Defining Email Send Settings	✅			
Analytics and Reporting				
Sync Custom Fields in Pardot Object Sync (Beta)			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Trust Attribution with Lead IDs	✅			
Exclude Archived Prospects from Datasets			✅	
Einstein Behavior Scoring Added to Analytics Setup				
Protect Prospect Activity Data with First-Party Tracking (Generally Available)			✅	
Access the Pardot Setup Assistant from the New Salesforce Marketing Setup App		✅		
Company Field in Pardot Dictates Business Unit Name in Pardot Account Setup			✅	
Sync Prospects Safely With Cross-Business Unit Leads and Contacts		✅		
Pardot API V5 Generally Available		✅		
Pardot API: New and Changed Items		✅		
Pardot User Authentication is Being Retired			✅	

myTrailhead

Add your company's product names to the Products list on myTrailhead and help your users pinpoint the content they're looking for. Complete myTrailhead modules without leaving the Salesforce app thanks to In-App Learning with Trailhead.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize the Product Filters on myTrailhead		✅		
Learn in the Flow of Work with In-App Learning with Trailhead (Beta)			✅	

Supported Browsers

We made some changes to our supported browsers documentation that make 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 Tableau CRM

Supported browsers for Tableau CRM (previously Einstein Analytics) include those supported for Lightning Experience with the following differences: Tableau CRM isn't supported on Apple® Safari®.

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.

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.

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
Experience Builder sites	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.

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.

🛑 **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	Not supported	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	Not supported	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Not supported
Special setup considerations?	Yes	Not supported	No	No	Yes	No
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 Tableau CRM

Supported browsers for Tableau CRM (previously Einstein Analytics) include those supported for Lightning Experience with the following differences: Tableau CRM isn't supported on Apple® Safari®.

Salesforce Overall

Language throughout our product was updated to reflect inclusivity. Salesforce Release Notes moved to Salesforce Help for a more unified user experience. Recently Viewed lists have customizable actions. You can add images to your in-app guidance, and snooze guidance so you can see it later. Use new survey actions in a flow and target specific survey participants with invitation rules. Use the new Salesforce Scheduler trial org to get a head start on your implementation, and set default time zones for appointment slots. Search using everyday words with natural language search for Government Cloud and the Salesforce mobile app.

IN THIS SECTION:

General Enhancements

To more accurately reflect inclusivity, some product language was updated. For a better user experience, the Release Notes moved to Salesforce Help.

User Engagement

Make your in-app guidance more engaging with images, more floating prompt locations, and docked prompt Rich Text Editing. Users can snooze in-app guidance to see it later. Plus, enhance your training program with In-App Learning with Trailhead (beta). Admins and training managers can customize a new learning panel.

Salesforce Surveys

Do more with surveys using actions in a flow. Schedule surveys, send reminders, or identify participants who can be invited again to a survey. Gather focused data and gain actionable insights by sending surveys to specific participant groups using survey invitation rules. Use organization-wide email addresses defined for your Salesforce org to send surveys. Validate how a participant responds to a short-text question in a survey. And show participants their progress in a survey by inserting a progress bar.

Salesforce Scheduler

Get service resources and service territories faster when scheduling appointments with the new service resource filter in Salesforce Scheduler flows and APIs. The new Default Time Zone attribute in Salesforce Scheduler flows lets you set time zones for appointment time slot pages according to the time zone of the service resource, service territory, customer, or browser time zone. And now modify service appointments via API by making PATCH requests to the Service Appointments API.

Search

Search brings intelligence and efficiency to users who are looking for relevant information in their Salesforce org. Users can find the records they want more easily and complete tasks right from the search results page.

General Enhancements

To more accurately reflect inclusivity, some product language was updated. For a better user experience, the Release Notes moved to Salesforce Help.

IN THIS SECTION:

Inclusive Terms Are Replacing Legacy Language

As part of our efforts to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. APIs and older API documentation aren't included because changing terms in our code can break current implementations. Legacy terms in documentation for products to be retired are also not changing.

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.

Browse, Buy, and Manage Your Products with Subscription Management App (Beta)

Add products and licenses, manage your contracts, and get account support right in your org with the new Subscription Management app (Beta).

Protect Users from Insecure Downloads in Chrome

Recent updates to the Chrome browser affect many Salesforce features. Google is protecting users from insecure downloads by blocking mixed-content downloads in Chrome. An example of a mixed-content download is when a link to an HTTP site is placed on an HTTPS page.

Rich Text Editors Get an Upgrade

Rich text editors that are using CKEditor have been upgraded to CKEditor version 4.14.0.

Quickly Find Portal Users When Changing Record Owners

When you want to give a portal user ownership of a record, you now can filter for customer portal users and partner users in the change owner window so you can efficiently find who you're looking for.

Catch Potential Duplicates Before Saving

On Dynamic Forms-enabled pages, Salesforce checks to see if you're working on a potential duplicate and warns you before you save. Previously, we checked for duplicates only after a save attempt.

UI Changes for Lightning Web Components

To enhance usability and performance, some components were switched from Aura components to Lightning Web Components (LWC). There are no reductions in functionality, but there are some minor UI differences.

Keep Working with Tab-Focused Dialogs (Previously Released Update)

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. This update was first made available in Winter '20.

Inclusive Terms Are Replacing Legacy Language

As part of our efforts to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. APIs and older API documentation aren't included because changing terms in our code can break current implementations. Legacy terms in documentation for products to be retired are also not changing.

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.

When: Starting in Winter '21.

Why: Equality is a core value at Salesforce. To ensure that language in Salesforce content and products is more inclusive, Salesforce will continue to make updates and communicate them in the release notes.

How: To learn more about terms that are changing, see How We're Bringing Inclusive Language to Our Products.

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 necessary (3).
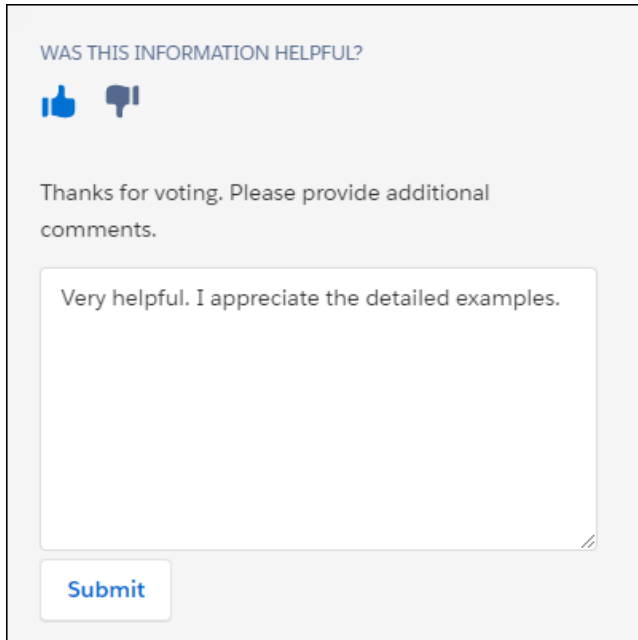
Or find topics you want by filtering (3) first. Just click the Filter icon. Filters include Experience: Salesforce Classic, Lightning Experience, and Mobile. And there are filters for Salesforce editions, product areas, and feature impact, such as Enabled for users, Enabled for admins, and so on. Used 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).
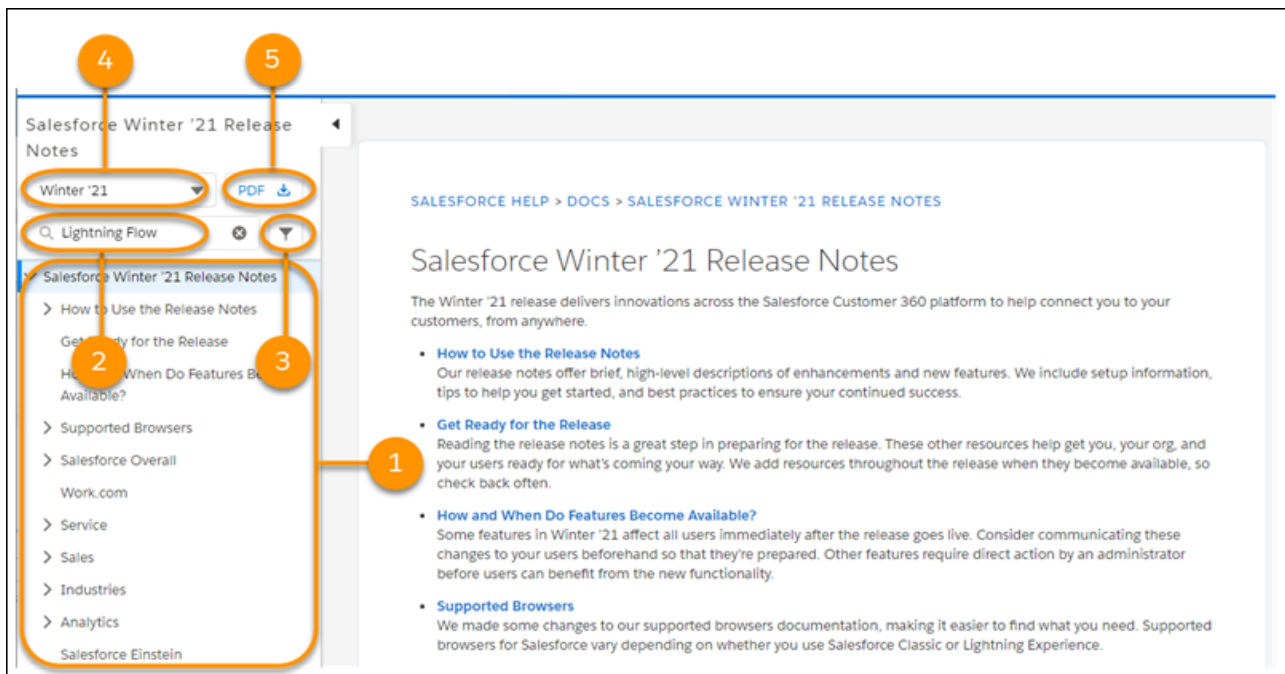
Have feedback? We welcome it! Tell us about your general experience by posting in the Release Readiness Trailblazers group or tweet us at @salesforcedocs. For release notes topics, you have the same options as help topics: thumbs up or thumbs down. You can include specifics in the Comments field.

Browse, Buy, and Manage Your Products with Subscription Management App (Beta)

Add products and licenses, manage your contracts, and get account support right in your org with the new Subscription Management app (Beta).

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

> **Note:** As a beta feature, the Subscription Management App 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.

Who: Admins with Manage Billing permission can turn on the Subscription Management app (Beta).

Why: With the Subscription Management app (Beta) you can:

- Add seats and licenses to your existing subscriptions.
- Browse the catalog of all available add-ons to your account.
- See your current and past contracts, and the products that you have.
- Log a support case.
- Contact sales for additional product information.
- And you can still navigate to Salesforce Checkout to view and pay your invoices.

How: From Setup, in the Quick Find box, enter `Manage Subscription`, and then select **Manage Subscription**. On the Checkout page, turn on Subscription Management App (Beta). Then, refresh the page.
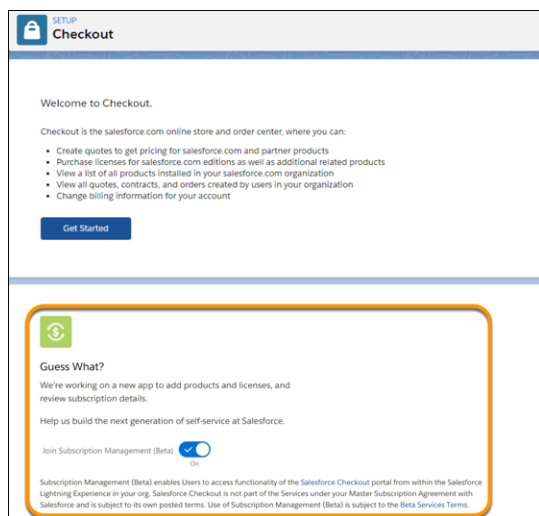
SEE ALSO:

Salesforce Help: Meet the New Subscription Management App (Beta)

Protect Users from Insecure Downloads in Chrome

Recent updates to the Chrome browser affect many Salesforce features. Google is protecting users from insecure downloads by blocking mixed-content downloads in Chrome. An example of a mixed-content download is when a link to an HTTP site is placed on an HTTPS page.

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

How: Google's phased rollout plan begins with a browser warning and then advances to blocking mixed-content downloads. Google's effort began in September 2020 and continues through the next several Chrome releases.

For information about affected features in Salesforce, see the Knowledge article, Google protecting users from insecure downloads in Google Chrome.

Rich Text Editors Get an Upgrade

Rich text editors that are using CKEditor have been upgraded to CKEditor version 4.14.0.

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

Why: CKEditor version 4.14.0 fixes a handful of security vulnerabilities.

In Lightning Experience and the Salesforce mobile app, CKEditor is used by:

- Email Composer
- Lightning Knowledge

In Salesforce Classic, CKEditor is used by:

- Chatter Publisher
- Custom Fields
- Email
- Flow Builder

- Groups
- Idea Themes
- Knowledge Article

SEE ALSO:

[Aura Components in the ui Namespace Are Being Deprecated](#)

Quickly Find Portal Users When Changing Record Owners

When you want to give a portal user ownership of a record, you now can filter for customer portal users and partner users in the change owner window so you can efficiently find who you're looking for.

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

How: Choose a user type when changing owners to refine your search results.

SEE ALSO:

Salesforce Help: Change a Record's Owner (can be outdated or unavailable during release preview)

Catch Potential Duplicates Before Saving

On Dynamic Forms-enabled pages, Salesforce checks to see if you're working on a potential duplicate and warns you before you save. Previously, we checked for duplicates only after a save attempt.

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

How: To catch duplicates, set up duplicate rules and matching rules for the object.

SEE ALSO:

   Salesforce Help: Customize Duplicate Management (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). There are no reductions in functionality, but there are some minor UI differences.

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

📝 Note: This change doesn't apply to Financial Services Cloud or Health Cloud because these products use custom components to edit records.

When: The changes appear in orgs on a rolling basis during the Spring '21 release and later.

How: When your users create, edit, or clone accounts, leads, contacts, and opportunities, the edited fields are now highlighted. Edited fields also show an undo button to revert changes. Errors now appear in the footer instead of at the top of the page. Errors messages are hidden automatically after users click a link within the error message. Previously, highlights, undo, and footer errors were available only for custom objects.

Success toast notifications for creating and cloning records now provide a link to the relevant record. Previously, links were included only when creating a record from a related list. For success toasts, if a record name isn't available, the record ID is provided instead.

A formula field now displays "This field is calculated upon save" when a record is edited using inline or standard editing. Previously the message appeared only during inline edits.

Keep Working with Tab-Focused Dialogs (Previously Released Update)

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. This update was first made available in Winter '20.

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, from Setup, in the Quick Find box, enter `Release Updates`, 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.
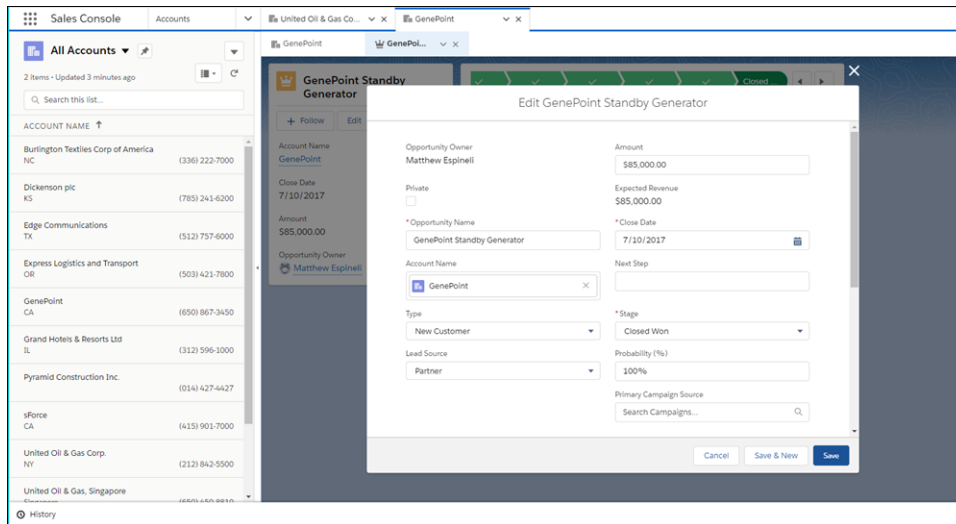
SEE ALSO:

[Release Updates](#)

User Engagement

Make your in-app guidance more engaging with images, more floating prompt locations, and docked prompt Rich Text Editing. Users can snooze in-app guidance to see it later. Plus, enhance your training program with In-App Learning with Trailhead (beta). Admins and training managers can customize a new learning panel.

IN THIS SECTION:

Add Images to In-App Guidance

Make your in-app guidance more engaging by adding a .jpg, .jpeg, .png, or .gif file. Animated .gifs can further articulate the guidance in a prompt.

Snooze In-App Guidance to See It Later

Now your users have a snooze option on all in-app guidance. Snoozing allows users to temporarily ignore in-app guidance for a period they choose without waiting for the next scheduled appearance.

Choose from More Positions for Your Floating Prompts

Place your floating prompt front and center or closer to components you're referencing with three new, center row layout options. With nine regions total, direct your user's attention to a specific area on the screen.

Add Walkthrough Steps That Go Beyond New, Edit, and Clone Pages

Now your walkthroughs can describe the entire process of creating, editing, and cloning records. Previously, if you added a walkthrough step to a dialog, you couldn't add a step after it to a nondialog page. You can now add steps after users finish interacting with the dialog.

Access Active In-App Guidance with Shareable URLs

Now your users can access in-app guidance anytime, as long as it's active. Previously, when you shared in-app guidance links with your users by sending them a URL, adding it to a custom section of the Help Menu, or creating an action button, it was subject to the scheduling, profile, and permission rules.

[Do More Rich Text Editing in Docked Prompts](#)

Get creative with your docked prompt's body text. You can now underline, add links to, or remove formatting from body text in your docked prompts.

[Move Floating Prompts on an iPad](#)

Despite your best effort at positioning a floating prompt, it could hide the very feature you're highlighting. You can now reposition floating prompts on Lightning Experience on iPad Safari.

[Learn About Salesforce In-App Content](#)

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

[Bring the Trailhead Learning Experience Inside the App (Beta)](#)

With In-App Learning with Trailhead, enhance your training program by making learning easily accessible to users right where they work. Admins or designated trainers customize a learning panel by selecting public or myTrailhead modules. Choose where the modules appear and assign them to specific users or public groups to match the learning to the context where users encounter it. Enable your Trailblazers to read modules, take quizzes, and earn badges in their flow of work.

[Get Personalized Guidance While Setting Up Salesforce](#)

Whether you're starting your first or your latest implementation of Salesforce, the Guidance Center offers admins of new Salesforce orgs personalized setup resources that align to their experience level and business goals. Learn about planning a rollout, setting up basic sales and service features, managing and securing data, setting up users for success, and more.
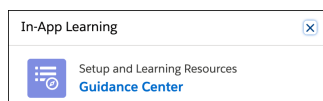
Add Images to In-App Guidance

Make your in-app guidance more engaging by adding a .jpg, .jpeg, .png, or .gif file. Animated .gifs can further articulate the guidance in a prompt.

Where: This change applies to Lightning Experience in Group, Essentials, 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: Add images to your prompts in the In-App Guidance Builder. From Setup in Lightning Experience, in the Quick Find box, enter `In-App Guidance`, and then select **In-App Guidance**. As you create a prompt, click Upload Files or drag the file to the Or drop files area.
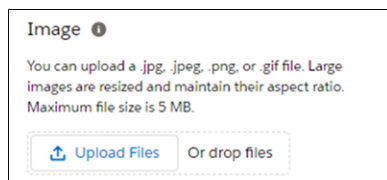
In Image Layout, select the image location relative to your prompt's text.
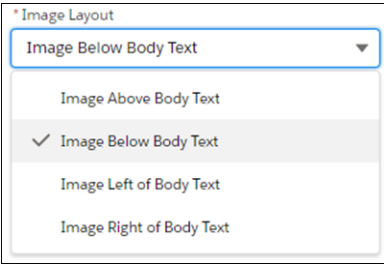
The image appears in one of the locations shown. For floating prompts, choose from above, below, to the right of, or to the left of your body text.
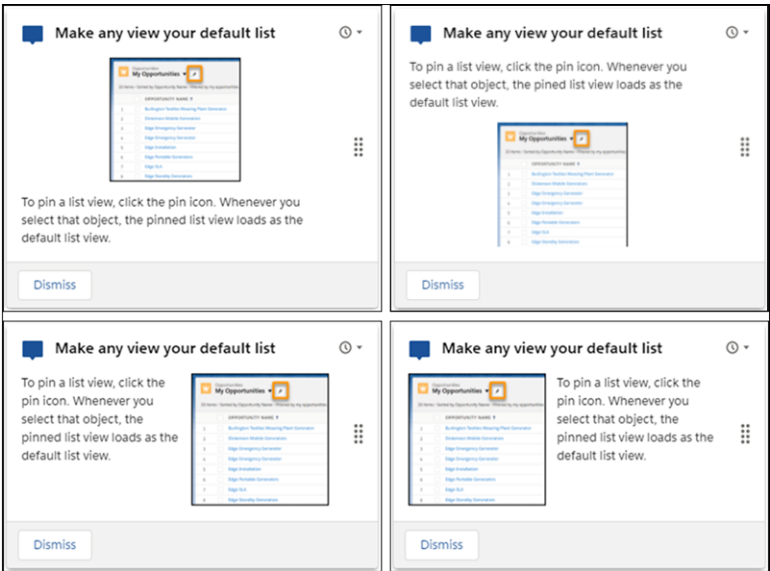
For docked prompts, choose from above or below your body text.
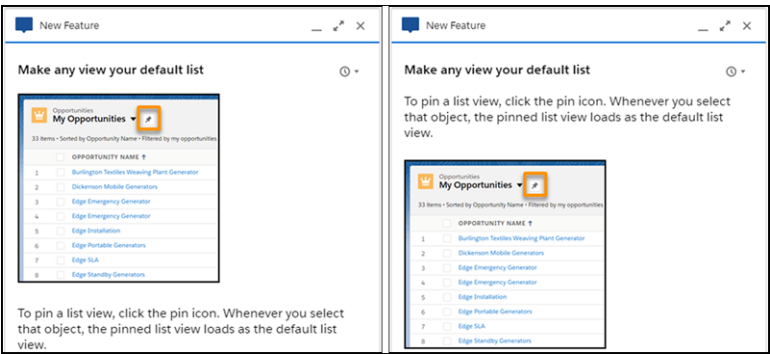
SEE ALSO:

Salesforce Help: Define Prompts in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Help: Define Walkthroughs in Lightning Experience (can be outdated or unavailable during release preview)

IdeaExchange: Add pictures to in-app guidance

Snooze In-App Guidance to See It Later

Now your users have a snooze option on all in-app guidance. Snoozing allows users to temporarily ignore in-app guidance for a period they choose without waiting for the next scheduled appearance.

Where: This change applies to Lightning Experience in Group, Essentials, 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.

Why: The Snooze icon replaces the X in floating prompts and is included in the body of docked prompts so that users don't dismiss the in-app guidance.

How: Snooze in-app guidance by clicking the Snooze icon and then selecting 20 Minutes, 1 Hour, 3 Hours, Tomorrow, or Next Week.

📝 Note: The Delay Between In-App Guidance setting still applies. Snoozing allows the in-app guidance to appear after the snooze time expires at the next scheduled time when users navigate to the page.
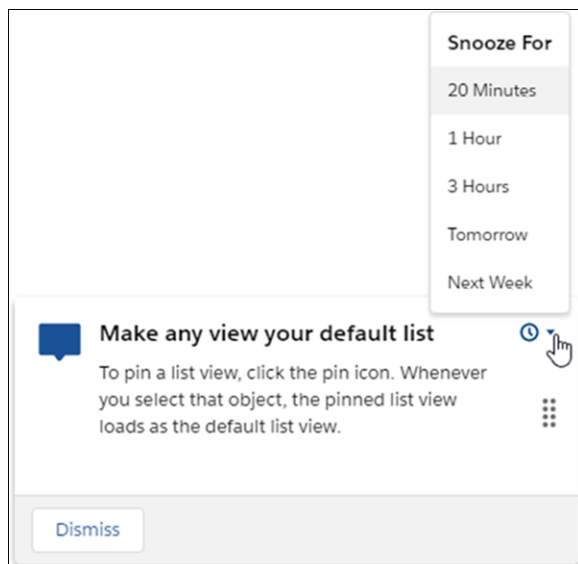
SEE ALSO:

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

Choose from More Positions for Your Floating Prompts

Place your floating prompt front and center or closer to components you're referencing with three new, center row layout options. With nine regions total, direct your user's attention to a specific area on the screen.

Where: This change applies to Lightning Experience in Group, Essentials, 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: As you create floating prompts in the In-App Guidance Builder, use the Position dropdown menu to choose from nine different prompt locations.
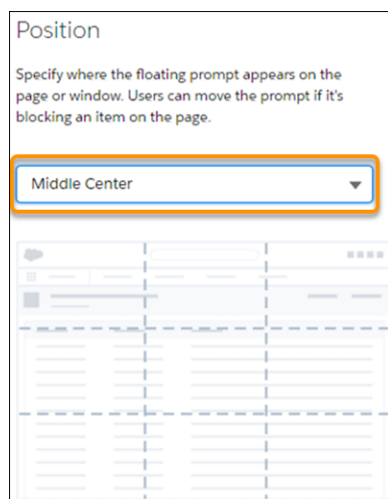
SEE ALSO:

    Salesforce Help: Define Prompts in Lightning Experience (can be outdated or unavailable during release preview)

Add Walkthrough Steps That Go Beyond New, Edit, and Clone Pages

Now your walkthroughs can describe the entire process of creating, editing, and cloning records. Previously, if you added a walkthrough step to a dialog, you couldn't add a step after it to a nondialog page. You can now add steps after users finish interacting with the dialog.

Where: This change applies to Lightning Experience in Group, Essentials, 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.

Why: Add a walkthrough to train users how to complete tasks, including steps that use and go beyond new dialogs. For example, walk users through creating a new lead. From the Leads record page, instruct users to click the New button to open the New Lead dialog.
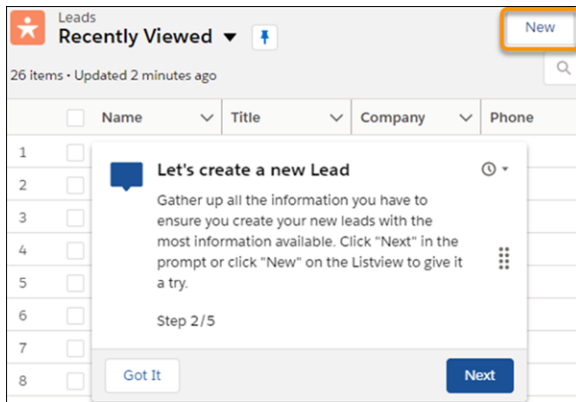
Guide users through creating a new lead.
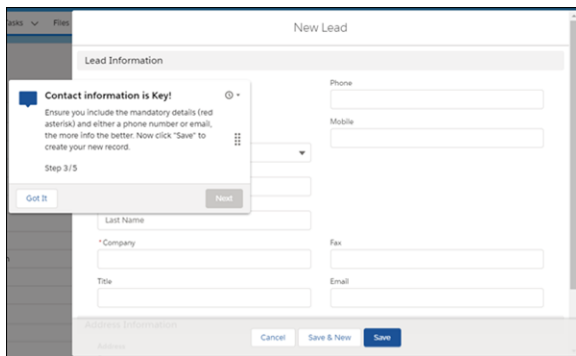
After they save the new lead's information, the walkthrough continues to a nondialog page, the new lead's record page.
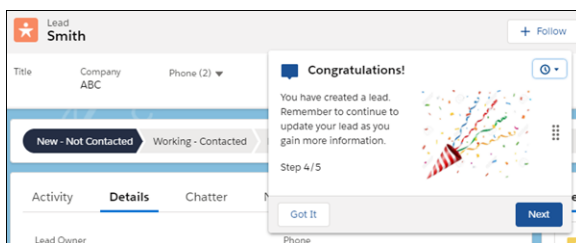
How: Add a walkthrough step to a new, edit, or clone record page type like any other page. Include one or more steps to the page, and after users complete the page's action (1), the walkthrough progresses to the next step.

Note: The walkthrough step's Next button is deactivated (2) when the next step appears automatically after users complete the page's action (1).

SEE ALSO:

Salesforce Help: Define Walkthroughs in Lightning Experience (can be outdated or unavailable during release preview)

Access Active In-App Guidance with Shareable URLs

Now your users can access in-app guidance anytime, as long as it's active. Previously, when you shared in-app guidance links with your users by sending them a URL, adding it to a custom section of the Help Menu, or creating an action button, it was subject to the scheduling, profile, and permission rules.

Where: This change applies to Lightning Experience in Group, Essentials, 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: Access shareable URLs from Settings inside the In-App Guidance Builder or from the row-level action menu on the In-App Guidance Setup page.

Note: Access to custom in-app guidance is still blocked if you deselect Custom In-App Guidance in the Settings accessed from the In-App Guidance Setup page.

SEE ALSO:

Salesforce Help: Customize the Help Menu (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for In-App Guidance (can be outdated or unavailable during release preview)

Do More Rich Text Editing in Docked Prompts

Get creative with your docked prompt's body text. You can now underline, add links to, or remove formatting from body text in your docked prompts.

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

Why: Add emphasis to your text by underlining it. Direct users to even more information and resources by adding links to body text in addition to the action button. Strip pasted content of its formatting or remove applied formatting.

How: Use the In-App Guidance Builder to create a docked prompt. In the Body field, highlight your text and click Underline, Link, or Remove formatting from the rich text editing toolbar.
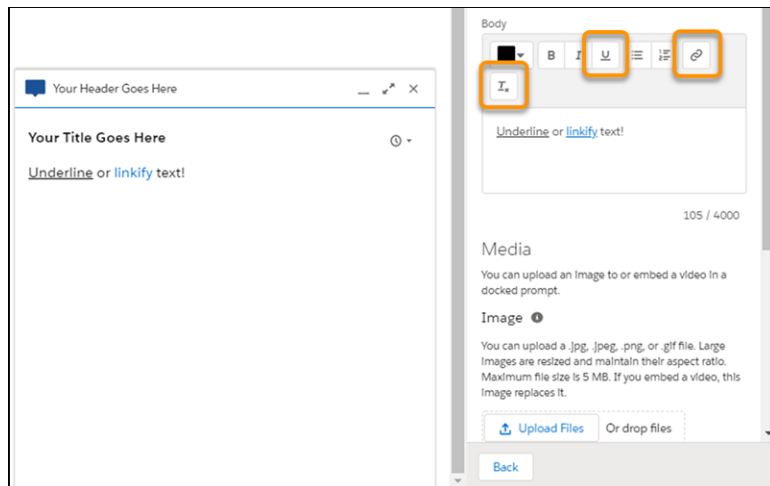
SEE ALSO:

Salesforce Help: Define Prompts in Lightning Experience (can be outdated or unavailable during release preview)

Move Floating Prompts on an iPad

Despite your best effort at positioning a floating prompt, it could hide the very feature you're highlighting. You can now reposition floating prompts on Lightning Experience on iPad Safari.

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

SEE ALSO:

Salesforce Help: Considerations for In-App Guidance (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 that 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.

Salesforce added these prompts.

- Docked prompt that introduces admins to Salesforce CPQ when they're interacting with quotes.
- Docked prompt that introduces admins to Salesforce CPQ when they're interacting with quotes. Only shown to admins.
- Floating prompt that reminds admins to try the Multi-Factor Authentication Assistant and guides them through stages if they left before completing the implementation path.

- Floating prompt that highlights release readiness materials. Only shown to admins.

- Prompts that highlights a series of features, such as Chatter, Home, Reports, List Views, and Opportunities, and how to customize them. Also listed inside the Guidance Center. Only shown to admins with new Salesforce orgs.

- Feature popover that encourages admins to use the Guidance Center in the In-App Learning. Only shown to admins.

- Feature popover that asks admins and end users for feedback about Einstein Opportunity Scoring.

- Feature popover that encourages admins to configure custom insights for Einstein Conversation Insights from the Call Insights Setup page.

- Welcome mat that provides resources for getting started with Pardot and Salesforce.

You can turn off in-app content authored by Salesforce from the In-App Guidance Setup page.

SEE ALSO:

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

Bring the Trailhead Learning Experience Inside the App (Beta)

With In-App Learning with Trailhead, enhance your training program by making learning easily accessible to users right where they work. Admins or designated trainers customize a learning panel by selecting public or myTrailhead modules. Choose where the modules appear and assign them to specific users or public groups to match the learning to the context where users encounter it. Enable your Trailblazers to read modules, take quizzes, and earn badges in their flow of work.

> 📝 Note: As a beta feature, In-App Learning with Trailhead 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.

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

Who: All users have access to view the new icon in the global header and the panel. Admins with Modify All Data or Customize Application can assign learning to users via the Learning object. To grant trainers, sales leads, or others the ability to manage learning, use the Manage Learning user permission.

Why: Learn the skills you need when you need them—without leaving the app. Previously, users opened modules from the Help Menu in a new tab or went to the Trailhead website to search for content. Now, simply click the new Trailhead icon in the global header, which opens the panel. Users experience the fun learning opportunities of Trailhead inside the workspace.

There are up to three sections in the in-app learning panel. If a module is associated with a specific object, it shows up under Related to This Page (1) for both the object home and record pages. Other globally assigned modules show up under Recommended (2). If the user has Salesforce-related accounts that are part of a Trailblazer.me profile, then the modules that they started show up under In Progress (3). And, any badges earned within the app are included in your profile.
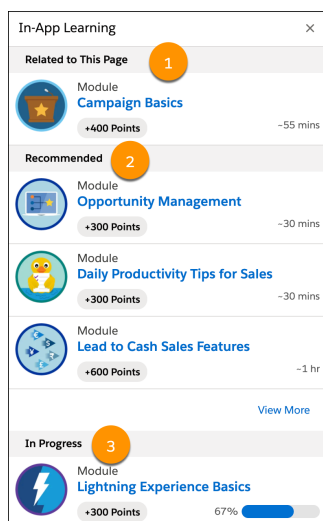
To start learning, click the module, then the unit name. Take the quiz as you would for a module on the Trailhead website.
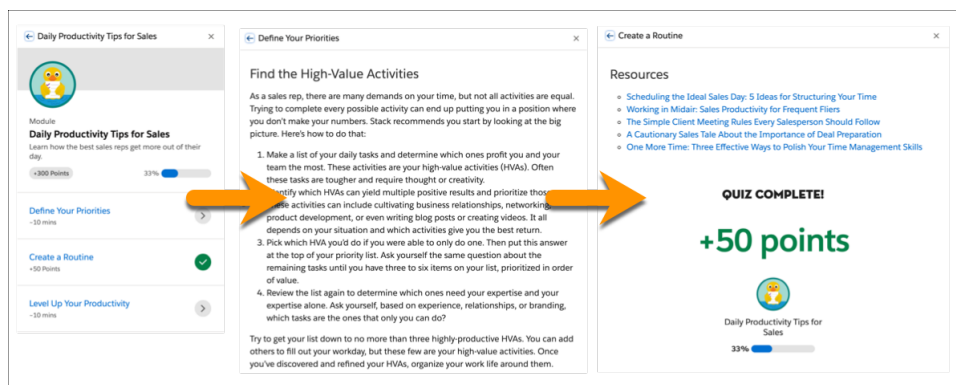
Only admins can see the these items by default. They remain even after customizing In-App Learning.

- To give you a sense of the possibilities of In-App Learning, we populated the Related to This Page section (1) of the panel on several pages in the Sales, Service, and Setup apps.

- We curated three module learning lists under Recommended (2) about release readiness, Salesforce Einstein, and Lightning Experience.

- Admins of new orgs see links to personalized recommendations to help set up your org under Guidance Center. Check out the related release note under See Also for more information.
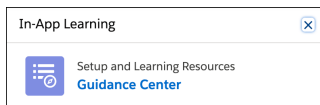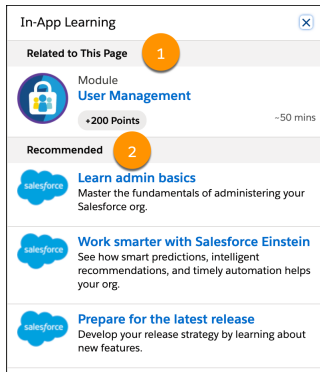
The panel doesn't contain any Salesforce suggested modules for end users. Admins or designated trainers customize the panel by selecting Trailhead modules and assigning them to a specific audience and location.

How: Click the icon for In-App Learning in the global header. At the bottom of the panel, click Assign Learning to Users to open Learning. You can also get to Learning from the App Launcher. Then, click New to open a form to create learning items.
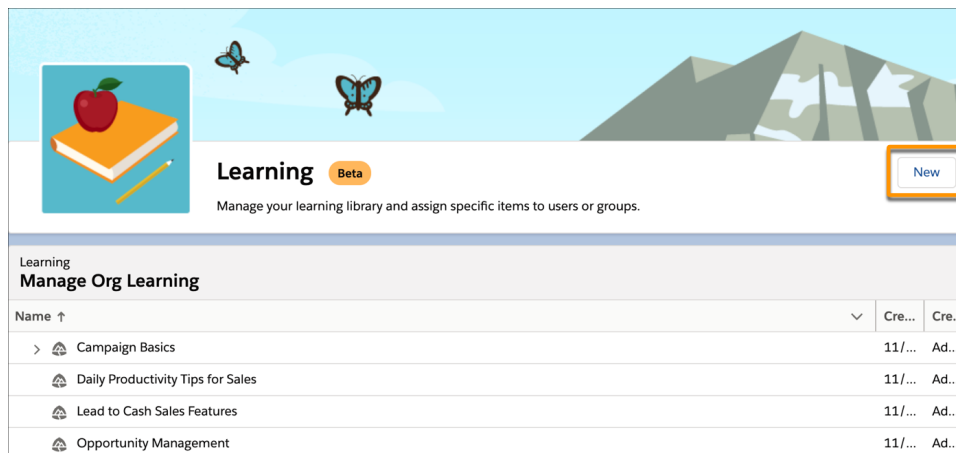
First, choose a module. If you have myTrailhead, add your own modules for the ultimate custom training experience. Then, select where the module shows up by choosing an app and object or a page in Setup. You can also select All for either to show a module org-wide,

app-wide, or for the same object across all apps. Then, show the module to all users, specific users or public user groups. If you want to create a learning item without it showing up in the panel, don't assign it to anyone.

SEE ALSO:

Get Personalized Guidance While Setting Up Salesforce

myTrailhead

Salesforce Help: Customize In-App Learning with Trailhead (Beta) (can be outdated or unavailable during release preview)

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

Learn in the Flow of Work with In-App Learning with Trailhead (Beta)

Get Personalized Guidance While Setting Up Salesforce

Whether you're starting your first or your latest implementation of Salesforce, the Guidance Center offers admins of new Salesforce orgs personalized setup resources that align to their experience level and business goals. Learn about planning a rollout, setting up basic sales and service features, managing and securing data, setting up users for success, and more.

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

Who: Admins with Modify All Data or Customize Application for orgs created after the release of Spring '21 see a link to the Guidance Center in In-App Learning with Trailhead.

How: Easily access the generally available Guidance Center and get setup assistance anywhere, anytime by clicking the icon for In-App Learning with Trailhead (beta) in the global header. Although the learning panel is available to all users, only admins see a link to the Guidance Center.

> **Note:** As a beta feature, In-App Learning with Trailhead 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.

When you first open the Guidance Center, answer a couple of questions to personalize the guidance to your experience level and business goals for the Sales and Service apps. After you submit your answers, review the tailored list of Trailhead modules, videos, prompts, and other resources as you set up your org.
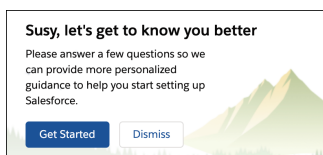
The Guidance Center recommendations are grouped. Although we recommend that you click the links in order, feel free to explore around. The icons next to the title let you know the type of resource. As you click resources, they're marked as completed to help you track your progress.
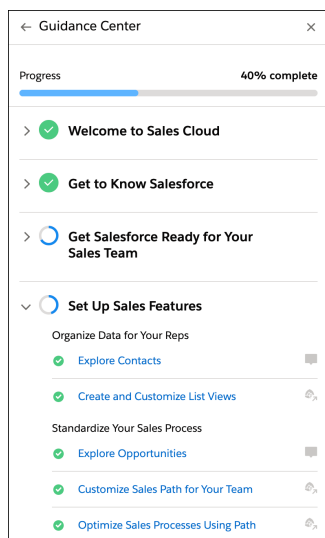
Bring the Trailhead Learning Experience Inside the App (Beta)

Salesforce Help: Get Personalized Guidance While Setting Up Salesforce (can be outdated or unavailable during release preview)

Salesforce Surveys

Do more with surveys using actions in a flow. Schedule surveys, send reminders, or identify participants who can be invited again to a survey. Gather focused data and gain actionable insights by sending surveys to specific participant groups using survey invitation rules. Use organization-wide email addresses defined for your Salesforce org to send surveys. Validate how a participant responds to a short-text question in a survey. And show participants their progress in a survey by inserting a progress bar.

IN THIS SECTION:

Schedule Surveys and More with New Actions Defined in a Flow

Send surveys to gather participant feedback at various intervals using a flow. Target specific participants and send reminders to complete the survey. And verify which participants to invite again. Use the Action element in the Flow Builder to add an action for a survey. Send a survey to leads, contacts, and members of your Salesforce org. Invitations can be unique and unauthenticated for specific recipients, and they can record their responses anonymously.

Collect more focused data from your participants by sending rules-based surveys. Create rules to send surveys when a record is created or updated for a SurveySubject supported object. To get more insights, set up a customer engagement context to collect information about the groups that are targeted.

Gain actionable insights by sending rule-based surveys to specific participants from a Customer Lifecycle Map. Create rules for sending surveys when a record is created or updated for a SurveySubject supported object. To get more insights, set up a customer engagement context to collect information about the groups that are targeted.

Send surveys to participants from an organization-wide email address defined for your Salesforce org. Using an alias to send the survey makes it easier for the sender to remain anonymous and receive unbiased responses from the survey.

To gather feedback from your website visitors that can influence your decision-making, you can now embed a survey in a web page.

Add a validation to guide how a participant can respond to a short-text question in a survey. For example, a participant can enter a number or add a response based on a custom validation formula, such as limiting their responses to specific characters. By default, no validations are applied.

A progress bar shows participants where they are in completing the survey. By default, the progress bar is enabled for each survey created.

Use Shield Platform Encryption to add another layer of protection to participant responses and information collected from a survey. Encrypt the responses from Salesforce users, such as administrators. Shield Platform Encryption can also help you comply with your regulatory mandates.

Track the performance of engagement channels across customer lifecycle stages. Use the enhanced Customer Lifecycle Map dashboards to analyze customer engagement based on Net Promoter Score (NPS) and Customer Satisfaction (CSAT) by channels.

Schedule Surveys and More with New Actions Defined in a Flow

Send surveys to gather participant feedback at various intervals using a flow. Target specific participants and send reminders to complete the survey. And verify which participants to invite again. Use the Action element in the Flow Builder to add an action for a survey. Send a survey to leads, contacts, and members of your Salesforce org. Invitations can be unique and unauthenticated for specific recipients, and they can record their responses anonymously.

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

How: In Flow Builder, drag the **Action** element in your flow. Select **Surveys** (1) as the category. In the **Action** (2) list, select from the list of active surveys available in your org. Define a label for the action (3) that is sent with the survey invitation and the recipient (4).

SEE ALSO:

Release Notes: Schedule Surveys and More with New Actions Defined in a Flow

Salesforce Help: Send Survey Invitations Using the Flow Builder

Salesforce Help: Flow Core Action: Send Surveys (can be outdated or unavailable during release preview)

Target Specific Survey Participants Using Rules

Collect more focused data from your participants by sending rules-based surveys. Create rules to send surveys when a record is created or updated for a SurveySubject supported object. To get more insights, set up a customer engagement context to collect information about the groups that are targeted.

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

How: To collect an engagement context, create a Custom Metadata Type and define the required parameters of the engagement context.

In a survey's Default Settings, select an email template (1), enable the engagement context configuration (2), save, and then in Survey Builder activate the survey.

From Setup, in the Quick Find box, enter `Survey Invitation Rules`, and open the configuration page. Click **New Rule**. Provide a survey rule name (1). Define the type of record that's created (2) or updated for a SurveySubject supported object. Select a survey that's sent to participants (3). To collect feedback from specific participants, define the survey engagement parameters (4). Ensure that the rule is active.

SEE ALSO:

> *Salesforce Help*: Use Rules to Target Specific Survey Participants (can be outdated or unavailable during release preview)

Target Specific Survey Participants Using Rules in Customer Lifecycle Maps

Gain actionable insights by sending rule-based surveys to specific participants from a Customer Lifecycle Map. Create rules for sending surveys when a record is created or updated for a SurveySubject supported object. To get more insights, set up a customer engagement context to collect information about the groups that are targeted.

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

How: To collect an engagement context, create a Custom Metadata Type, and define the required parameters of the engagement context.

In a survey's Default Settings, select an email template (1), enable the engagement context (2) configuration, save, and then activate the survey.

From Setup, in the Quick Find box, enter `Customer Lifecycle Maps`, and open the configuration page. Click a stage in an existing map or create a map. For a question in the map stage where the email template and engagement context are set, select **Invitation Rules** (1). Click **Create New Survey Configuration** (2) or edit an existing configuration.

Then define the invitation conditions (3). Ensure that the rule is active.

Salesforce Help: Track Surveys Sent to Participants Across Their Lifecycle (can be outdated or unavailable during release preview)

Send Surveys Using an Alias

Send surveys to participants from an organization-wide email address defined for your Salesforce org. Using an alias to send the survey makes it easier for the sender to remain anonymous and receive unbiased responses from the survey.

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

How: In a survey's Default Settings, in **Email Sender Address**, select the organization-wide email address defined for your org.

Embed a Survey in a Web Page

To gather feedback from your website visitors that can influence your decision-making, you can now embed a survey in a web page.

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

Who: To embed a survey, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

How: In the HTML code of the web page, add the iframe tag, and embed the unauthorized survey invitation link. Add the iframe tag in this format: `<iframe src="embed_the_survey_invitation_url"></iframe>`

SEE ALSO:

Salesforce Help: Embed a Survey in a Web Page or Chat (can be outdated or unavailable during release preview)

Validate Short-Text Responses from Participants

Add a validation to guide how a participant can respond to a short-text question in a survey. For example, a participant can enter a number or add a response based on a custom validation formula, such as limiting their responses to specific characters. By default, no validations are applied.

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

How: Add a short-text question to a survey. From the Response Validation Type list, select a validation that you want to apply to the participant response.

SEE ALSO:

Salesforce Help: Validate Short-Text Responses from Participants (can be outdated or unavailable during release preview)

Show Participants the Survey Completion Status

A progress bar shows participants where they are in completing the survey. By default, the progress bar is enabled for each survey created.

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

How: In a survey, click **Branding** (1), and then enable or disable **Progress Bar** (2).
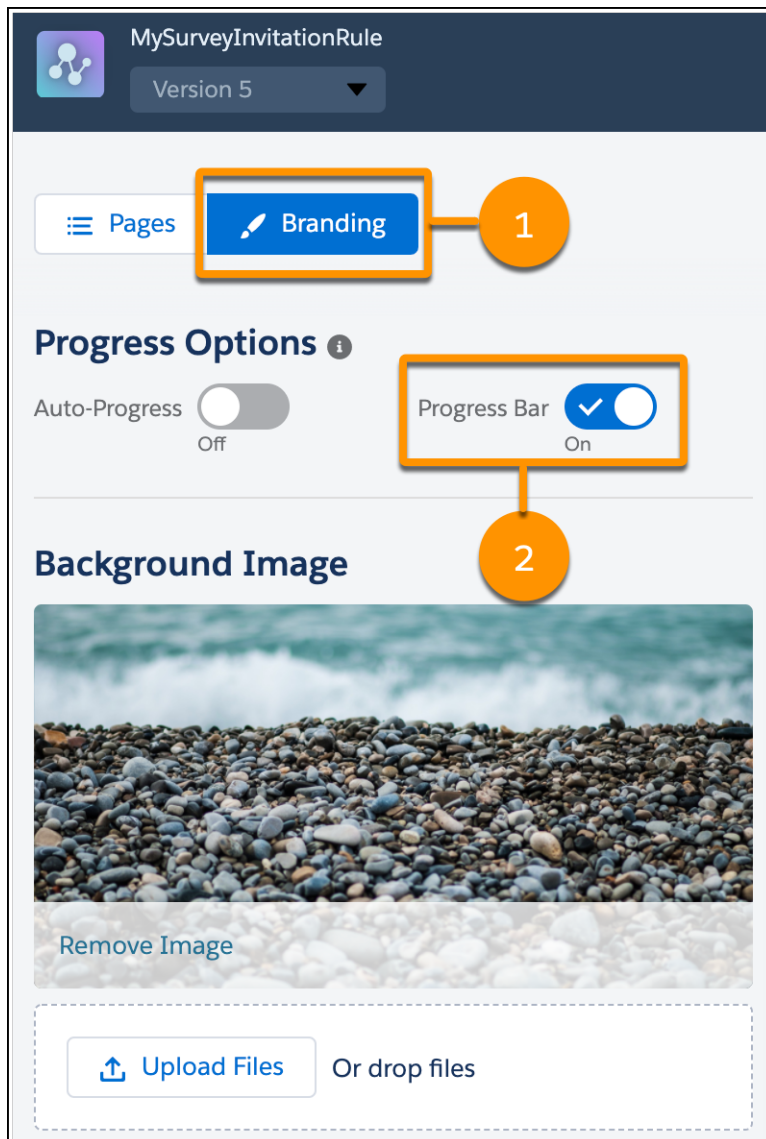
When you run the survey, the progress bar (3) appears at the top.
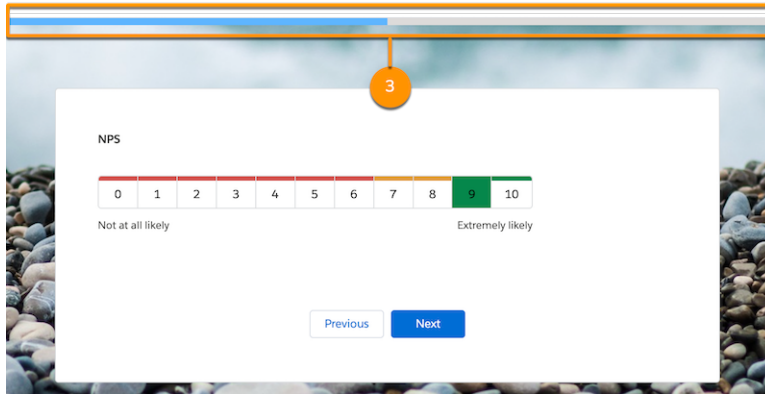
Encrypt Responses in a Survey

Use Shield Platform Encryption to add another layer of protection to participant responses and information collected from a survey. Encrypt the responses from Salesforce users, such as administrators. Shield Platform Encryption can also help you comply with your regulatory mandates.

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 a Salesforce Shield or Shield Platform Encryption add-on subscription and enabled Salesforce Surveys.

How: From Setup, in the Quick Find box, enter `Encryption Policy`, and then select **Encrypt Fields**. Click **Edit**, and select a field. Fields on the Survey Question Response object support the probabilistic encryption scheme.

Monitor Engagement Channel Performance and Improve Customer Experience

Track the performance of engagement channels across customer lifecycle stages. Use the enhanced Customer Lifecycle Map dashboards to analyze customer engagement based on Net Promoter Score (NPS) and Customer Satisfaction (CSAT) by channels.

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

Who: To use Customer Lifecycle Map dashboards, you must have the Salesforce Feedback Management license.

How: From Tableau CRM Analytics Studio, click **All Items**, select the **Apps** tab, and select your app. Click the **Dashboards** tab and open Customer Lifecycle Map dashboards to monitor the performance of engagement channels such as email, chat, and website.
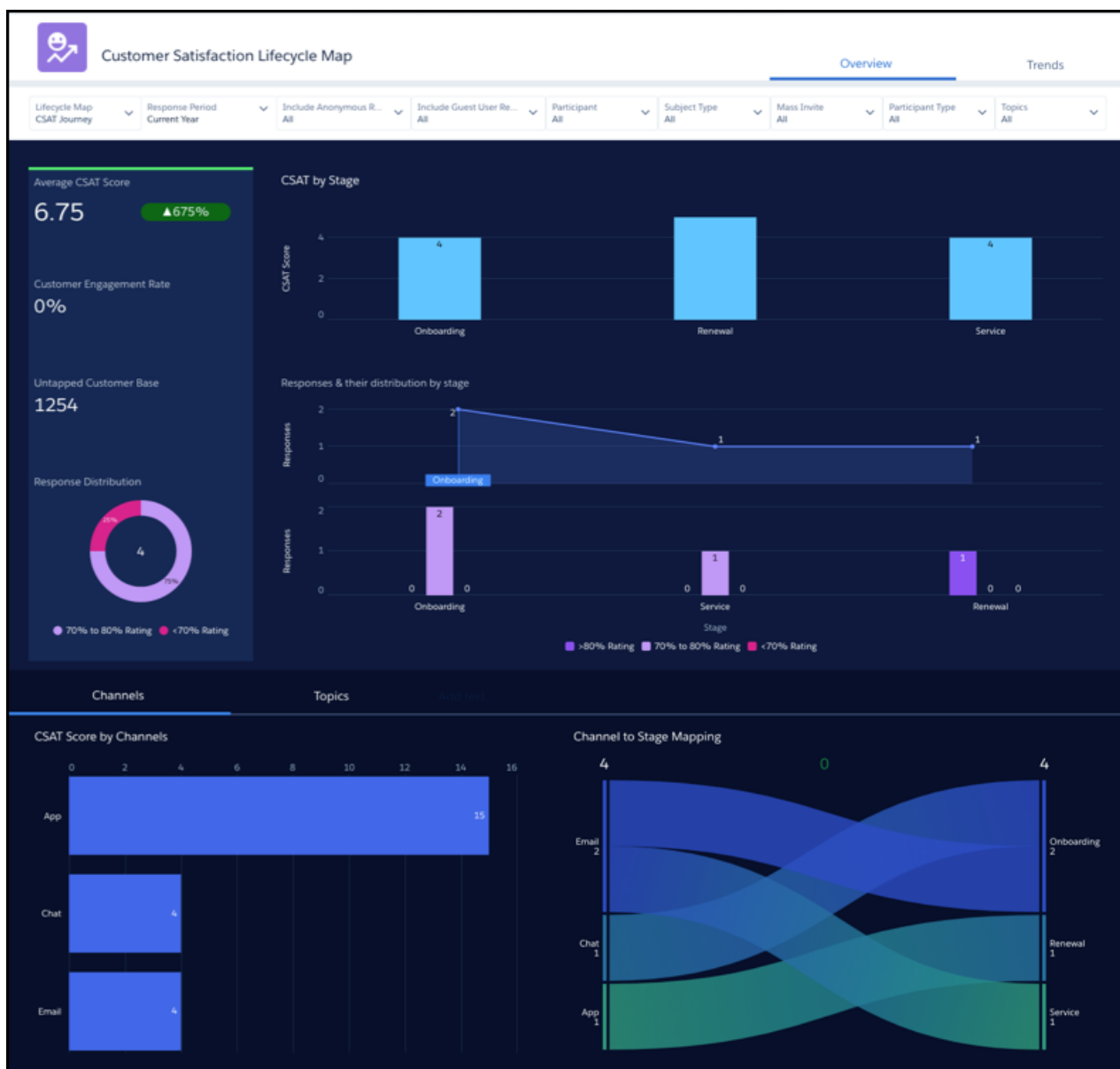
SEE ALSO:

    Salesforce Help: Use Customer Lifecycle Analytics Dashboards (can be outdated or unavailable during release preview)

Salesforce Scheduler

Get service resources and service territories faster when scheduling appointments with the new service resource filter in Salesforce Scheduler flows and APIs. The new Default Time Zone attribute in Salesforce Scheduler flows lets you set time zones for appointment time slot pages according to the time zone of the service resource, service territory, customer, or browser time zone. And now modify service appointments via API by making PATCH requests to the Service Appointments API.

IN THIS SECTION:

Preset a Time Zone for Appointment Time Slots

Manage time zones for appointment time slots with the new Default Time Zone attribute in Salesforce Scheduler flows. Enter a time zone in the attribute to set as the default time zone or use a flow variable to dynamically set a time zone according to the selected service resource, service territory, customer, or browser time zone.

Set a Time Zone for the Review Appointment Page

By default, the review page now shows the scheduled appointment time in the same time zone that was selected on the appointment time slot page. Previously, it showed the appointment time in the scheduler's time zone. Now you can override the default behavior and set a different time zone for the review page using the Time Zone attribute.

Let External Users Schedule Appointments Across Time Zones

Now your authenticated external users and guest users can view and select appointment time slots in the time zone they prefer. When you set the Show Time Zone Pick List attribute to True, the appointment time slot pages show a list of all time zones supported in Salesforce.

Make Scheduling More Efficient with Service Resource Filtering

Schedule appointments faster and with the most suitable service resources by applying service resource filters in your Salesforce Scheduler flows. Use the new Filter by Resource IDs attribute on relevant flow pages to specify a list of service resource IDs. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments.

Make Changes on Previous Pages

During appointment scheduling, when users go back to a page and make changes, those changes are now reflected in the flow. Users no longer have to cancel the scheduling process and start all over again if they didn't select the right value on a previous page.

Embed Salesforce Scheduler Flows into Other Flows

Salesforce Scheduler flow type now supports subflows. You can call a Salesforce Scheduler flow from within another flow that is of the Salesforce Scheduler flow type. For example, you can create and add a simple Salesforce Scheduler flow to the account page that asks users whether they want to create or modify an appointment, and then it launches the related flow.

Modify Appointments with PATCH Requests to the Service Appointments API

You can now modify service appointments via API by making PATCH requests to the Service Appointments API. Change multiple elements of an appointment through a single request, saving time and effort. For example, add or remove service resources and change service territory, appointment time, and appointment topic.

Schedule Appointments Faster with Salesforce Scheduler API Updates

The Get Appointment Candidates and Available Territory Slots APIs have a new filterByResources field that lets you specify a list of service resource IDs in your requests. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments, resulting in faster response times. And the Get Appointment Candidates and Available Territory Slots APIs now return time slots up to 31 days from the start time.

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

Preset a Time Zone for Appointment Time Slots

Manage time zones for appointment time slots with the new Default Time Zone attribute in Salesforce Scheduler flows. Enter a time zone in the attribute to set as the default time zone or use a flow variable to dynamically set a time zone according to the selected service resource, service territory, customer, or browser time zone.

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

How: The Default Time Zone attribute is available on the Select Service Appointment Time, Select Service Resource and Service Appointment Time, and Select Service Resource pages in appointment flows. On the Review Service Appointment or the Review Inbound or Outbound Service Appointment page, use the existing Time Zone attribute to set a default time zone.

- To set a default time zone for a time slot page, enter a time zone in the Default Time Zone attribute on the corresponding flow screen component.
- To quickly set one default time zone for all time slot pages, use the provided DefaultTimeZone flow variable to set the value of the attribute.
- To dynamically set a time zone, apply custom logic to set the value of the attribute.
- If you don't specify a value for the Default Time Zone attribute, the time slots are shown in the user's (appointment scheduler's) time zone.
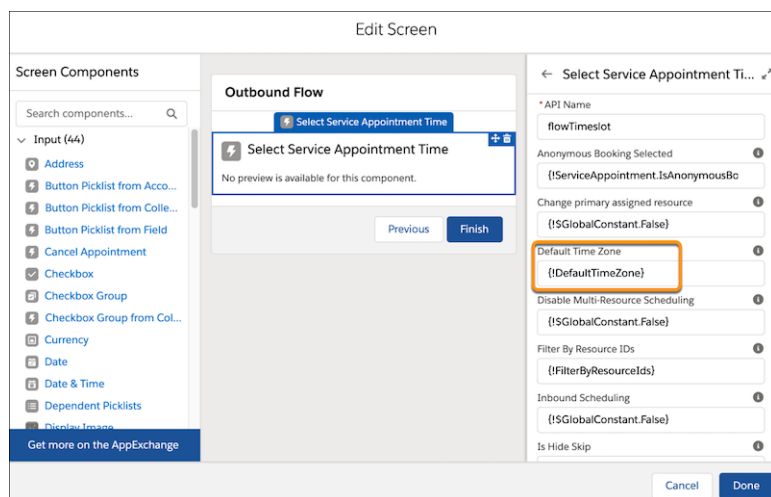
SEE ALSO:

    Salesforce Help: Preset a Time Zone for Appointment Time Slot Pages (can be outdated or unavailable during release preview)

Set a Time Zone for the Review Appointment Page

By default, the review page now shows the scheduled appointment time in the same time zone that was selected on the appointment time slot page. Previously, it showed the appointment time in the scheduler's time zone. Now you can override the default behavior and set a different time zone for the review page using the Time Zone attribute.

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

How: To set a time zone for the review page, on the corresponding flow screen component, in the Time Zone attribute, replace the default value with a time zone. To retain the previous behavior, delete the default value.
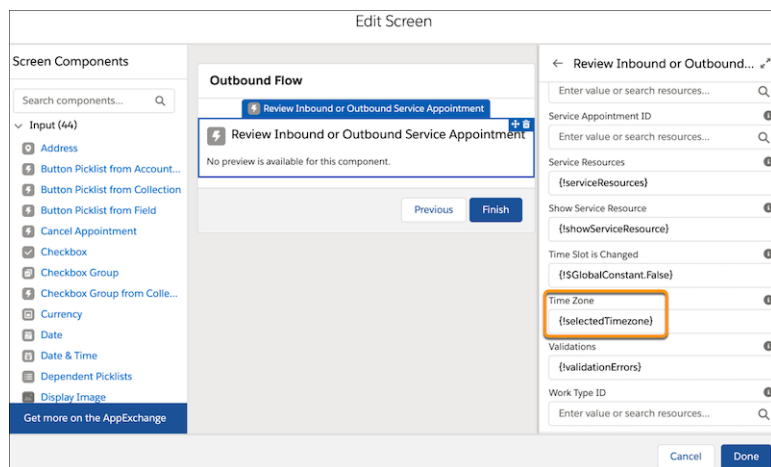
SEE ALSO:

Salesforce Help: Set a Time Zone for the Review Appointment Page (can be outdated or unavailable during release preview)

Let External Users Schedule Appointments Across Time Zones

Now your authenticated external users and guest users can view and select appointment time slots in the time zone they prefer. When you set the Show Time Zone Pick List attribute to True, the appointment time slot pages show a list of all time zones supported in Salesforce.

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

Why: Previously, the Time Zone dropdown list was available only in outbound flows.

How: On the relevant flow screen component, in the Show Time Zone Pick List attribute, enter *{ !$GlobalConstant.True}*. Or, use the showTimeZonePicklist flow variable to set the value of the attribute.

SEE ALSO:

Make Scheduling More Efficient with Service Resource Filtering

Schedule appointments faster and with the most suitable service resources by applying service resource filters in your Salesforce Scheduler flows. Use the new Filter by Resource IDs attribute on relevant flow pages to specify a list of service resource IDs. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments.

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

How: The Filter by Resource IDs attribute is available on the Select Service Resource page in outbound flows and on the Select Service Resource and Service Appointment Time page in inbound and guest flows.

On the relevant flow screen component, in the Filter by Resource IDs attribute, enter a comma-separated list of service resource IDs. The affected page shows only those eligible service resources that are in the specified list of service resources and in the selected service territory and work type group. And the resources appear in the order in which you specified them in the comma-separated list.
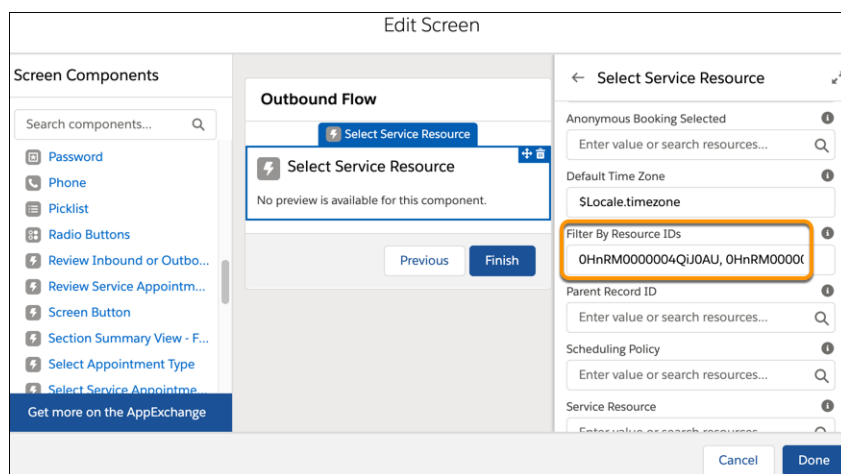
SEE ALSO:

 Salesforce Help: Enable Service Resource Filtering (can be outdated or unavailable during release preview)

Make Changes on Previous Pages

During appointment scheduling, when users go back to a page and make changes, those changes are now reflected in the flow. Users no longer have to cancel the scheduling process and start all over again if they didn't select the right value on a previous page.

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

How: To enable this capability in your existing flows, on the relevant flow screen components, in the properties pane, expand **Advanced**. Under Revisited Screen Values, select **Refresh inputs to incorporate changes elsewhere in the flow**. This option is preselected in the new Salesforce Scheduler flows.

SEE ALSO:

Salesforce Help: Update Flows to Refresh Inputs (can be outdated or unavailable during release preview)

Embed Salesforce Scheduler Flows into Other Flows

Salesforce Scheduler flow type now supports subflows. You can call a Salesforce Scheduler flow from within another flow that is of the Salesforce Scheduler flow type. For example, you can create and add a simple Salesforce Scheduler flow to the account page that asks users whether they want to create or modify an appointment, and then it launches the related flow.

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

How: Create a Salesforce Scheduler flow. In Flow Builder, drag the Subflow element onto the canvas. In the Referenced Flow field, search for and select a Salesforce Scheduler service appointment flow.

SEE ALSO:

Salesforce Help: Embed Lightning Scheduler Flows into Other Flows (can be outdated or unavailable during release preview)

Modify Appointments with PATCH Requests to the Service Appointments API

You can now modify service appointments via API by making PATCH requests to the Service Appointments API. Change multiple elements of an appointment through a single request, saving time and effort. For example, add or remove service resources and change service territory, appointment time, and appointment topic.

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

Who: Salesforce Scheduler users and authenticated users of Salesforce Scheduler's self-service interface (in an Experience Cloud site) can make PATCH requests to the Service Appointments API.

SEE ALSO:

Salesforce Release Notes: Connect REST API

Schedule Appointments Faster with Salesforce Scheduler API Updates

The Get Appointment Candidates and Available Territory Slots APIs have a new filterByResources field that lets you specify a list of service resource IDs in your requests. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments, resulting in faster response times. And the Get Appointment Candidates and Available Territory Slots APIs now return time slots up to 31 days from the start time.

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

SEE ALSO:

Salesforce Release Notes: Connect REST API

Salesforce Release Notes: REST API

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

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

Why: Appointment scheduling is now better and easier for you and your users.

Schedule appointments across time zones on the go
The Time Zone dropdown list on appointment time slot pages is now available on mobile devices.

Save a click when scheduling an appointment
Preselect an option on the Select Service Resources page by using the Selected Option attribute on the relevant flow screen component. In the attribute, enter $findResource$ (1), $specific$ (2), or $previousServiceResource$ (3), depending on the option you want preselected on the page. Or, use the selectedTriageOption variable to set the value of the attribute. By default, the first option is selected.

Pinpoint and troubleshoot appointment errors faster with custom error messages

Salesforce Scheduler flows now support validation rules and triggers. When you create validation rules on the Service Appointment object, you can add error messages specific to the validations. Those error messages replace the `something went wrong` message that appears during appointment creation or updates, whatever the error.

Modify service appointments with ease

The Modify Service Appointment quick action is now available on the Service Appointment record page out-of-the-box. This action launches the provided Outbound Modify Appointment standard flow template. If you use a custom flow to modify appointments, edit the Modify Service Appointment quick action and link it to your custom flow.

Avoid confusion by preventing users from modifying or canceling already canceled appointments

When users try to modify or cancel a service appointment that's already canceled, Salesforce Scheduler displays an error message stating that they can't.

Provide a better user experience on mobile devices with the enhanced time slot page

The enhanced time slot page is now supported on various mobile devices. It automatically adapts to varying display sizes and orientations.

Select the earliest available service resource

On the service resource pages in flows, service resources are now listed in the order of their earliest next availability date and time. The service resource that's available at the earliest date or time is at the top of the list. The dates are in the time zone that's set in the Default Time Zone attribute.

Schedule appointments 31 days in advance

The service resource pages now show resource availability for the next 31 days starting from the current date. Previously, it was 28 days.

Make appointment flow screens more dynamic with component visibility filters

Salesforce Scheduler flow components now respect component visibility conditions. You can define a rule to show or hide a component based on the options users select during appointment scheduling. For example, on the review appointment page, add a Display Text component with a message that reminds users to carry a copy of their Employer Identification Number. Then create a rule to show the component only when users select the Business Banking work type group when scheduling appointments.

SEE ALSO:

Salesforce Help: Preselect an Option on the Select Service Resources Page (can be outdated or unavailable during release preview)

Search

Search brings intelligence and efficiency to users who are looking for relevant information in their Salesforce org. Users can find the records they want more easily and complete tasks right from the search results page.

IN THIS SECTION:

[Einstein Search](#)

Natural language search lets users search with everyday words to get filtered lists of records. By narrowing down search results, users can find what they're looking for more easily. You can now enable natural language search in Government Cloud. And the same natural language search capability on the desktop is now available on the Salesforce mobile app.

[Get Search Results for More Objects](#)

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

Einstein Search

Natural language search lets users search with everyday words to get filtered lists of records. By narrowing down search results, users can find what they're looking for more easily. You can now enable natural language search in Government Cloud. And the same natural language search capability on the desktop is now available on the Salesforce mobile app.

> **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:

[Benefit from AI-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](#)

Benefit from AI-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 it!

SEE ALSO:

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

Get Search Results for More Objects

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

Where: These changes apply to Lightning Experience and all versions of the Salesforce mobile app.

The following objects are now searchable:

Object	Product Area	Where
Allergy Intolerance	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Async Operation Log	Commerce Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Auth Application Asset	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Auth Application Place	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Auth Location Access Schedule	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Banker	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Benefit	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Benefit Type	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Branch Unit	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Branch Unit Business Member	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Branch Unit Customer	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience

Object	Product Area	Where
Branch Unit Related Record	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Bus Reg Auth Type Dependency	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Care Observation	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Care Observation Component	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Care Performer	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Alert	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter Diagnosis	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter Facility	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter Provider	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter Reason	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Encounter Svc Request	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Service Request	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Clinical Service Request Detail	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Customer Property	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Diagnostic Summary	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Guest Buyer Profile	Commerce (B2B)	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Healthcare Facility	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience

Object	Product Area	Where
Health Condition	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Inspection Assessment Ind	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Inspection Type	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Interaction	Financial Services Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Interaction Summary	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Location Group	Commerce Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Loyalty Member Currency	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Program	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Program Currency	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Program Mbr Promotion	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Tier	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Tier Benefit	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Loyalty Tier Group	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Medication	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Medication Request	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Medication Statement	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Member Benefit	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Network Referenced Object	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience

Object	Product Area	Where
Order Summary	Commerce Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Patient Health Reaction	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Patient Immunization	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Patient Medical Procedure	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Patient Medical Procedure Detail	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Patient Medication Dosage	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Person Examination	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Person Language	Health Cloud	Enterprise, Professional, and Developer editions in Lightning Experience
Polygon	Public Sector Solutions	Available in Setup. Enterprise, Unlimited, and Developer editions in Lightning Experience
Preliminary Application Ref	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Program Rebate Type Filter	Manufacturing Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Program Rebate Type Payout	Manufacturing Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Program Rebate Typ Payout Src	Manufacturing Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Promotion Market Segment	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Public Complaint	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Rebate Member Product Aggregate	Manufacturing Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Reg Authorization Type Product	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Regulatory Authority	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience

Object	Product Area	Where
Regulatory Code	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Regulatory Code Assessment Ind	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Regulatory Code Violation	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Regulatory Trxn Fee	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Regulatory Trxn Fee Item	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Shipment	Commerce Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Training Course Participant	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Trn Course	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Video Call	Sales Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Video Call Participant	Sales Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Video Call Recording	Sales Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Violation Enforcement Action	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Violation Type	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Violation Type Assessment Ind	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Voucher	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Voucher Definition	Loyalty Management	Enterprise, Performance, Unlimited, and Developer 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)

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

Get excited for a smarter Service Cloud. Dive into your Einstein Article Recommendation model in a new scorecard, and deliver data from standard and custom objects in Einstein Bots. Field Service streamlines the scheduling experience with point-to-point predictive routing, appointment matching for shifts, and alerts when your mobile worker arrives. With setup enhancements and new productivity tools in Service Setup Assistant, Service Cloud Voice, and Knowledge, you get more time to focus on your customers.

IN THIS SECTION:

Einstein for Service

Build confidence in Einstein Bots with an error handler system dialog and the ability to show data from Salesforce records. Use the Einstein Article Recommendations scorecard to identify where you can improve data in your predictive model. Allow Einstein to recommend chat replies based on fewer closed chat transcripts. Expand your global reach with multiple language support for Bot inputs and other Einstein for Service features.

Field Service

Work smarter with advanced maintenance recurrence (generally available) to create maintenance work rules for individual assets on daily, weekly, monthly, or yearly recurring schedules. Use shift patterns to define recurring schedules so that your managers can quickly create and assign the usual shifts. Add scheduling criteria to shifts to match the right types of appointments to the right resource.

Service Setup Assistant

The fastest way to get started with Service Cloud now has more features included, so you can spend more time focusing on your customers. Use the new update tool to configure the latest features in one click: Chat and Messaging channels, Omni-Channel, Knowledge, Case Merge, Case Status Automation, and more. New walkthroughs help admins get acquainted with quick text and macros.

Channels

Voice setup is faster and more automated, so you can get your contact center up and running quickly. Give your customers the option to request a callback instead of waiting on hold. Voice is now integrated with High-Velocity Sales so sales reps can reach more customers. Link your messaging templates to specific channels with a new metadata option.

Knowledge

Use the Service Setup Assistant to quickly and easily configure your initial Knowledge setup. Add text captions to images for screen readers. Keep previously attached files when adding articles with attachments to email. See the latest version of a favorite article when that article is updated.

Routing

The After-Conversation Work (pilot) gives agents time to finish work after the conversation ends.

Case Management

Choose your org's default FROM address for certain Case-related notifications, skip the tricky entitlement setup process by customizing prebuilt ones, and restrict users from using the Interaction Layout Assignment to view profiles they don't own. Tab switching lets you create Macros across tabs without switching back and forth from the Lightning App builder, and an extended enforcement date for the Winter '21 Email-to-Case Release Update gives admins more time to prepare their orgs.

Other Changes in Service Cloud

Keep your org more secure with profile filtering for CTI users. If you use the CPQ Large-Scale Amendment and Renewal Service, quotes now include only CPQ-managed assets.

Einstein for Service

Build confidence in Einstein Bots with an error handler system dialog and the ability to show data from Salesforce records. Use the Einstein Article Recommendations scorecard to identify where you can improve data in your predictive model. Allow Einstein to recommend chat replies based on fewer closed chat transcripts. Expand your global reach with multiple language support for Bot inputs and other Einstein for Service features.

IN THIS SECTION:

Einstein Bots

Build trust with built-in error handling. Create a bot to deliver data from standard or custom objects with Object Search. Article Answers quickly delivers information from knowledge articles to your customers. Updates to intent models in all bots help you get started with natural language processing in a flash.

Einstein Article Recommendations

Article Recommendations provides a model scorecard and support for seven languages.

Einstein Case Classification

To give you greater control over prediction automation, we expanded prediction confidence settings.

Einstein Reply Recommendations

Get started with fewer chat transcripts and suggest replies to your agents in one non-English language (pilot).

Einstein Voice Wrap-Up

Help your agents capture call details quickly and easily with Einstein Voice Call Wrap-Up (pilot).

SEE ALSO:

Salesforce Einstein

Einstein Bots

Build trust with built-in error handling. Create a bot to deliver data from standard or custom objects with Object Search. Article Answers quickly delivers information from knowledge articles to your customers. Updates to intent models in all bots help you get started with natural language processing in a flash.

IN THIS SECTION:

Build Customer Trust with the Error Handler System Dialog

It's now easy to be transparent about errors during conversations when your bot employs the Error Handler system dialog. This prebuilt system dialog includes a friendly message and attempts to transfer to an agent, ensuring that your customers have a great bot experience every time. You can customize this dialog to fit the bot's language or your own custom error path.

Scale Up Intent Models with Multi-Language Support for Input Recommender and Input Recommender for Intent Sets (Beta)

Strengthen your bot's intent models in new languages with Input Recommender. Training the bot in your customers' words and languages creates a better customer experience and delivers strong intent recommendations. Input Recommender is great for building out lots of utterances for a new intent or recommending high-value utterances to strengthen existing intents. Now you can use Input Recommender inside your intent sets to generate utterances to share across your bots.

Find Answers Fast with Article Answers (Pilot)

When your customer asks a question, Article Answers delivers a recommended answer from a knowledge article if it's unable to match for an intent. You can adjust Article Answers to fit your company's voice, fields, and knowledge categories. Prebuilt feedback capturing with event logging collects article feedback from your customers in real time.

Supercharge the Template Bot with Included Intent Data (Beta)

The Template Bot is even smarter with included intent data. Now, your bot can build a model in the background, allowing the bot to process customer inputs right away. Plus, a new behind-the-scenes guide gives a detailed view of each component so you can learn to build a great bot experience.

Deliver Information from Records with Object Search (Beta)

Activating Object Search empowers bots to read objects inside Salesforce, creating endless opportunities to delight your customers. Logic helps define the search and admins can use merge field syntax to deliver up to three records in the conversation. With object search, bots can deliver data directly to your customers: show their last three orders, update an upcoming appointment in a custom object, or create feedback records.

Construct Bots Quickly with Dialog Cloning

Cloning dialogs and dialog steps help admins set up bots faster. If you have a bot, you can create similar dialogs for new audiences by cloning dialogs and dialog steps.

Promote Utterances from Bot Training to Intent Sets

In one click, you can train your bot and share new utterances to intent sets. Integrate customer text inputs directly into an intent set to make intent data portable. Utterances in Bot Training can now be reclassified to any bot dialog intent or intent set in just a few clicks. Easily share customer input data between production and sandbox bots or across multiple bots.

Build Intent Models with Fewer Utterances

Create a robust intent model in record time. Data is key in creating a successful model, and incomplete or lopsided data sets can affect bot performance. Bots can start to use Einstein after you have 20 utterances per intent. The bot can identify intent starting with 50+ utterances per intent, equally balanced among each intent in the bot. With background enhancements, bots decreased the utterance recommendation from 150 to 50 and can now automatically handle dataset imbalances.

Get Global with Bot Language Updates

Einstein Bots can reach even larger global audiences with updated language support. Brazilian Portuguese, Dutch, and Russian are now generally available.

Learn More About Your Bots with New Metrics

New time-based metrics expand standard reporting. Bot performance data is moving so you can build incredible bot reports and dashboards in the solutions you use every day.

Increase Security with Shield Platform Encryption for Einstein Bots

Now you use Shield Platform Encryption to encrypt the Utterance field on the MlIntentUtteranceSuggestion object. This field includes customer suggestions to add to the Intent Model and contains data when admins select Store Einstein Bots conversation data on the Bot Overview page. This field only supports case-insensitive deterministic encryption.

Bot Options Menu Behavior Was Changed

To offer a transfer option, admins now can add the Transfer to Agent dialog to the Bot Options Menu. Previously, if the Bot Options Menu was enabled and no dialogs were assigned to it, the menu showed an option to transfer to an agent. This option didn't follow custom routing behavior and created an inconsistent customer experience. This direct transfer is no longer available starting in Spring '21.

Keep Conversations Secure: Bots HIPAA and SOC2 Compliance

To increase trust with your customers, Einstein Bots is now HIPAA and SOC2 compliant in the Chat channel. Customers in the healthcare industry can have secure conversations over chat. And bots now exceed data confidentiality and privacy standards set by SOC2. The bot infrastructure now meets the highest standards for security, availability, and processing integrity of conversation data.

Stay current with updates to Einstein Bots.

Build Customer Trust with the Error Handler System Dialog

It's now easy to be transparent about errors during conversations when your bot employs the Error Handler system dialog. This prebuilt system dialog includes a friendly message and attempts to transfer to an agent, ensuring that your customers have a great bot experience every time. You can customize this dialog to fit the bot's language or your own custom error path.

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 the 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.

How: The Error Handler system dialog is available by default in new bots. Existing bots can assign a dialog as the Error Handler by clicking the dropdown next to the dialog and selecting **Set As Error Handler**. Only one dialog can be assigned as the Error Handler at a time.

▼
Edit
Clone Dialog
Set as Welcome
Set as Main Menu
Set as No Available Agents
Set as Error Handler
Delete
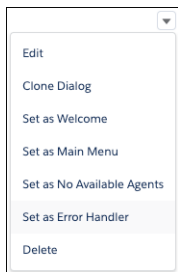
SEE ALSO:

Salesforce Help: Understanding System Bot Dialogs

Scale Up Intent Models with Multi-Language Support for Input Recommender and Input Recommender for Intent Sets (Beta)

Strengthen your bot's intent models in new languages with Input Recommender. Training the bot in your customers' words and languages creates a better customer experience and delivers strong intent recommendations. Input Recommender is great for building out lots of utterances for a new intent or recommending high-value utterances to strengthen existing intents. Now you can use Input Recommender inside your intent sets to generate utterances to share across your bots.

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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. Admins can launch Input Recommender inside an intent set by clicking **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 per language to deliver high-quality recommendations.
- Input Recommender supports the following languages: Dutch, English, French, and German.

📝 Note: Any use of this beta feature is subject to the Beta Services terms at Agreements and Terms.

SEE ALSO:

Salesforce Help: Use Input Recommender to Generate Utterances (Beta)

Find Answers Fast with Article Answers (Pilot)

When your customer asks a question, Article Answers delivers a recommended answer from a knowledge article if it's unable to match for an intent. You can adjust Article Answers to fit your company's voice, fields, and knowledge categories. Prebuilt feedback capturing with event logging collects article feedback from your customers in real time.

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How: To learn more about the pilot, contact your Salesforce representative.

📝 Note: We provide this feature 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. This 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.

Supercharge the Template Bot with Included Intent Data (Beta)

The Template Bot is even smarter with included intent data. Now, your bot can build a model in the background, allowing the bot to process customer inputs right away. Plus, a new behind-the-scenes guide gives a detailed view of each component so you can learn to build a great bot experience.

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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. Intent data is only included on newly created bots.

📝 Note: Any use of this beta feature is subject to the Beta Services terms at Agreements and Terms.

SEE ALSO:

Salesforce Help: Learn About the Template Bot

Salesforce Help: Create an Einstein Bot from Template (Beta)

Deliver Information from Records with Object Search (Beta)

Activating Object Search empowers bots to read objects inside Salesforce, creating endless opportunities to delight your customers. Logic helps define the search and admins can use merge field syntax to deliver up to three records in the conversation. With object search, bots can deliver data directly to your customers: show their last three orders, update an upcoming appointment in a custom object, or create feedback records.

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How:

📝 Note: Any use of this beta feature is subject to the Beta Services terms at Agreements and Terms.

Add an Action dialog step and select **Object Search** as the Action Type.

📝 Note: Object Search supports these standard objects: Account, Case, Contact, Contract, Knowledge, Lead, Opportunity, Order, Task.

SEE ALSO:

Salesforce Help: Introduce Object Search in a Dialog (Beta)

Construct Bots Quickly with Dialog Cloning

Cloning dialogs and dialog steps help admins set up bots faster. If you have a bot, you can create similar dialogs for new audiences by cloning dialogs and dialog steps.

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How: You can clone a dialog by selecting **Clone** from the dialog dropdown. Click the 🗐 icon on the dialog step to clone a specific dialog step.
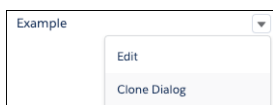
SEE ALSO:

    Salesforce Help: Clone a Bot

    Salesforce Help: Clone a Dialog or Dialog Step

Promote Utterances from Bot Training to Intent Sets

In one click, you can train your bot and share new utterances to intent sets. Integrate customer text inputs directly into an intent set to make intent data portable. Utterances in Bot Training can now be reclassified to any bot dialog intent or intent set in just a few clicks. Easily share customer input data between production and sandbox bots or across multiple bots.

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How: Access the Bot Training tab from the Model Management page. To promote to an intent set, click **Reclassify** on any utterance.
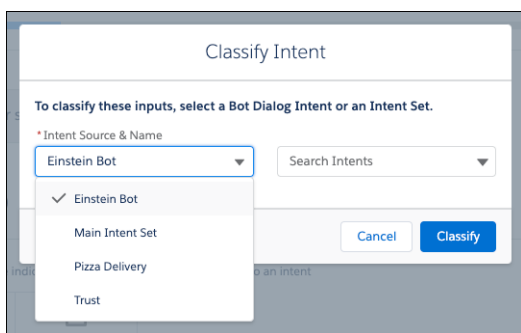
SEE ALSO:

    Salesforce Help: Improve Intent Matching Quality with Bot Training

Build Intent Models with Fewer Utterances

Create a robust intent model in record time. Data is key in creating a successful model, and incomplete or lopsided data sets can affect bot performance. Bots can start to use Einstein after you have 20 utterances per intent. The bot can identify intent starting with 50+ utterances per intent, equally balanced among each intent in the bot. With background enhancements, bots decreased the utterance recommendation from 150 to 50 and can now automatically handle dataset imbalances.

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Who: Einstein Bots is available to Salesforce orgs with both the 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.

Get Global with Bot Language Updates

Einstein Bots can reach even larger global audiences with updated language support. Brazilian Portuguese, Dutch, and Russian are now generally available.

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 the 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.

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.

SEE ALSO:

    Salesforce Help: Create a Bot for a Specific Language

Learn More About Your Bots with New Metrics

New time-based metrics expand standard reporting. Bot performance data is moving so you can build incredible bot reports and dashboards in the solutions you use every day.

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 the 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.

How: You can download the new AppExchange package from Salesforce Labs that installs custom report types and popular bot metric reports. Report on all bots or a specific bot across date ranges and share insights with key stakeholders in minutes. Identity your customers' most used dialogs and point out areas for improvement by reviewing exceptions, bot confusion, and transfers.
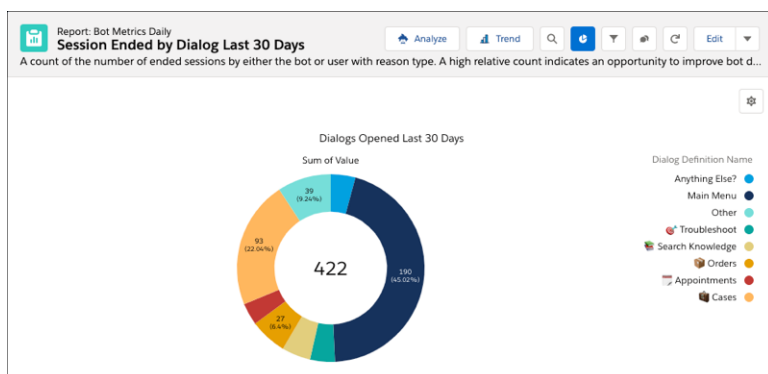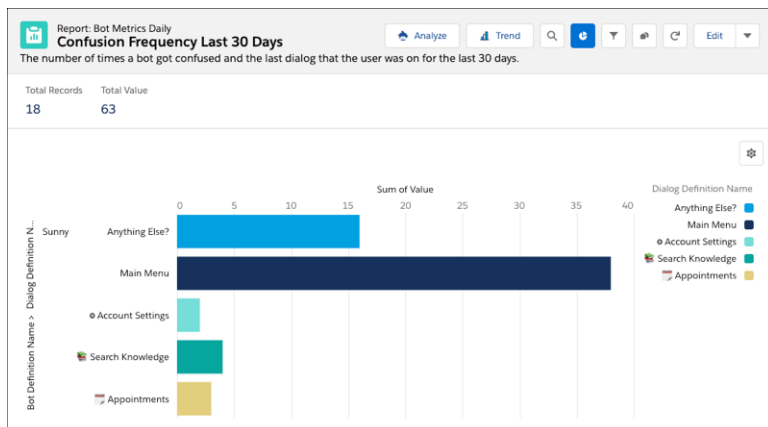
Reports include:

- All Bot Sessions Last 30 Days
- All Bot Sessions Today
- Confusion Frequency Last 30 Days
- Confusion Frequency Today
- Dialog Frequency Last 30 Days
- Dialog Frequency Today
- Dialogs with Exceptions Last 30 Days
- Dialogs with Exceptions Today
- Session Ended by Dialog Last 30 Days
- Session Ended by Dialog Today

The Einstein Bot Metrics package is available for free to all customers. Get it here

You can also create standard reports using the Conversation Definition Sessions, Conversation Definition Dialog Daily Metrics, and Conversation Definition Hourly Dialog Metrics objects. To create a standard report, you must create a report type with the object first. More information about report types can be found at Create a Custom Report Type. Metrics in the Bot Performance Dashboard are no longer available.

If you use Tableau CRM and Einstein Bots, you can view the Chatbot Analytics v2 Dashboard by visiting the Analytics Studio app in the App Launcher. The original dashboard is no longer available in the Performance tab of the Bot Builder.

Increase Security with Shield Platform Encryption for Einstein Bots

Now you use Shield Platform Encryption to encrypt the Utterance field on the MlIntentUtteranceSuggestion object. This field includes customer suggestions to add to the Intent Model and contains data when admins select Store Einstein Bots conversation data on the Bot Overview page. This field only supports case-insensitive deterministic encryption.

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 the 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.

How: You can set up Shield Platform Encryption using the instructions in Trailhead: Set Up and Manage Shield Platform Encryption. After you enable it, from Setup, in the Quick Find box, enter **Encryption Policy**, then click **Encrypt Fields**, and then click **Edit** to check the Utterance field.

Learn more about Shield Platform Encryption at How Shield Platform Encryption Works.

SEE ALSO:

> *Salesforce Help*: Deploy Your Bot to Your Channels

Bot Options Menu Behavior Was Changed

To offer a transfer option, admins now can add the Transfer to Agent dialog to the Bot Options Menu. Previously, if the Bot Options Menu was enabled and no dialogs were assigned to it, the menu showed an option to transfer to an agent. This option didn't follow custom routing behavior and created an inconsistent customer experience. This direct transfer is no longer available starting in Spring '21.

Keep Conversations Secure: Bots HIPAA and SOC2 Compliance

To increase trust with your customers, Einstein Bots is now HIPAA and SOC2 compliant in the Chat channel. Customers in the healthcare industry can have secure conversations over chat. And bots now exceed data confidentiality and privacy standards set by SOC2. The bot infrastructure now meets the highest standards for security, availability, and processing integrity of conversation data.

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 the 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.

How: Einstein Bots are now HIPAA-compliant with Chat (In-App and Web). Beta and Pilot features aren't HIPAA-compliant. SOC 2 Compliance is available for all channels.

To learn more about compliance, visit the Salesforce Trust site or the Einstein Platform Compliance site.

Other Improvements to Einstein Bots

Stay current with updates to Einstein Bots.

- Timeout behavior for Einstein Bots with the Chat Channel is updated. If the end user requests a transfer to an agent, the bot attempts to transfer up to the 30-minute time limit. If no agents are available at the end of the time limit, the transfer is closed.

- Transfer behavior for Einstein Bots with Messaging Channels is updated. Previously, the bot sent a "We're transferring you to an agent" message before transferring to an agent. This message has been removed, and admins can configure the Error Handler system dialog to manage transfers. Learn more about the Error Handler at Understanding System Bot Dialogs.

Einstein Article Recommendations

Article Recommendations provides a model scorecard and support for seven languages.

IN THIS SECTION:

Improve Accuracy with Insights from the Model Scorecard

To recommend articles that can help agents close cases, Einstein requires lots of rich case and knowledge data to learn from. To help you understand your data and the effectiveness of your predictive model, Einstein produces a model scorecard. At a glance, you can learn where there are opportunities to refine your data and improve recommendations.

Deliver Einstein Article Recommendations in Seven Languages (Generally Available)

When your business crosses borders, let Einstein recommend articles in a language that matches the customer's inquiry. Article recommendations are now available in Dutch, French, German, Italian, Portuguese, and Spanish, in addition to English.

Improve Accuracy with Insights from the Model Scorecard

To recommend articles that can help agents close cases, Einstein requires lots of rich case and knowledge data to learn from. To help you understand your data and the effectiveness of your predictive model, Einstein produces a model scorecard. At a glance, you can learn where there are opportunities to refine your data and improve recommendations.

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

How: The scorecard updates when Einstein retrains the model or when you rebuild it.

From Setup, under Einstein Article Recommendations, open the **Model Scorecard** tab. On the left, the scorecard shows model accuracy and quality (1). On the right, you can learn more about your data: how much term overlap there is between cases and articles (2), how well populated your selected case fields are (3), and how many case-article attaches there are per language (4). The results help you understand where your data contributes to accurate recommendations and where you can make improvements.
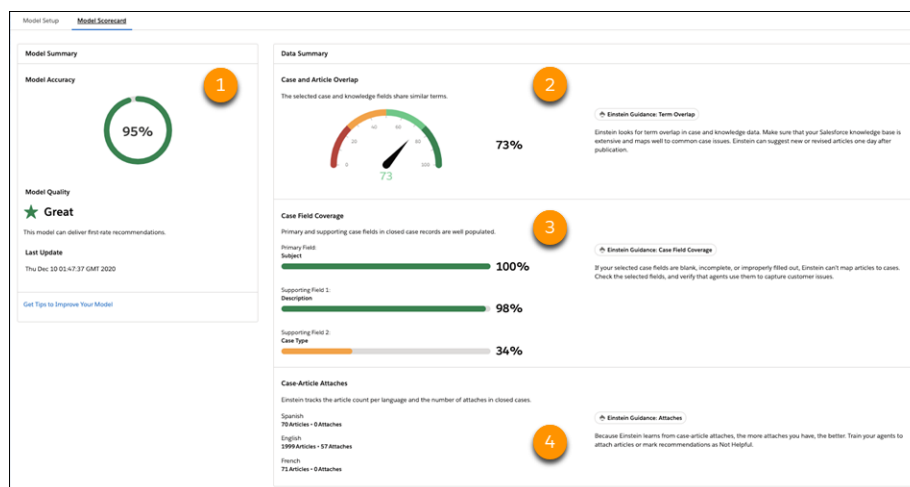
SEE ALSO:

   Salesforce Help: Learn About Model and Data Quality (can be outdated or unavailable during release preview)

Deliver Einstein Article Recommendations in Seven Languages (Generally Available)

When your business crosses borders, let Einstein recommend articles in a language that matches the customer's inquiry. Article recommendations are now available in Dutch, French, German, Italian, Portuguese, and Spanish, in addition to English.

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

How: If you're just getting started with Einstein Article Recommendations, you need at least three knowledge articles in one of the seven supported languages. In Setup, select the languages that you want Einstein to use. If you're already using Einstein Article Recommendations or participated in the multi-language pilot, we preselect languages for you. In Setup, you can change what's selected and rebuild the model.

To recommend articles, Einstein uses natural language processing (NLP). Einstein detects the case's language and checks the Language field for the knowledge article version. Here's how multi-language recommendations work:

- If the case language is supported*, Einstein recommends relevant articles in that language.
- If the case language isn't supported*, Einstein recommends relevant articles in the org's Knowledge master language.
- If the case and Knowledge master languages aren't supported* and English is a selected language, Einstein recommends relevant English articles.

*Here, a supported language is:

- One of the languages supporting Einstein Article Recommendations: Dutch, English, French, German, Italian, Portuguese, or Spanish
- Set to Active in your Knowledge settings

SEE ALSO:

   Salesforce Help: Prepare for Einstein Article Recommendations (can be outdated or unavailable during release preview)

Einstein Case Classification

To give you greater control over prediction automation, we expanded prediction confidence settings.

IN THIS SECTION:

Control Einstein's Automated Actions with Precision
Tell Einstein to select or save field values using a range of confidence thresholds from 0 to 100%. Previously, the range was 50-100%. For each field in your model, set the threshold at which Einstein saves a field value automatically, and a lower threshold at which Einstein selects the best value. When a prediction doesn't meet either threshold, Einstein shows agents the top field values.

Control Einstein's Automated Actions with Precision

Tell Einstein to select or save field values using a range of confidence thresholds from 0 to 100%. Previously, the range was 50-100%. For each field in your model, set the threshold at which Einstein saves a field value automatically, and a lower threshold at which Einstein selects the best value. When a prediction doesn't meet either threshold, Einstein shows agents the top field 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.

Einstein Reply Recommendations

Get started with fewer chat transcripts and suggest replies to your agents in one non-English language (pilot).

IN THIS SECTION:

[Enable Chat Agents to Respond in One of 16 Languages (Pilot)](#)

Give your chat and messaging agents suggested responses that reflect where you do business. When you have a majority of 10,000 closed chat transcripts in a single supported non-English language, Einstein can recommend replies in that language. Supported languages are Arabic, Chinese-simplified, Chinese-traditional, English, French, German, Italian, Japanese, Korean, Dutch, Polish, Portuguese, Spanish, Thai, Turkish, or Russian.

[Start with Fewer Transcripts and Increase Replies](#)

Get started with Einstein Reply Recommendations when your org has 1,000 usable English closed chat transcripts. Previously, to enable Einstein to build a model and suggest replies to your agents, you needed at least 10,000 transcripts. Einstein can produce an initial list of reply templates and later perform a one-time refresh of your list.

Enable Chat Agents to Respond in One of 16 Languages (Pilot)

Give your chat and messaging agents suggested responses that reflect where you do business. When you have a majority of 10,000 closed chat transcripts in a single supported non-English language, Einstein can recommend replies in that language. Supported languages are Arabic, Chinese-simplified, Chinese-traditional, English, French, German, Italian, Japanese, Korean, Dutch, Polish, Portuguese, Spanish, Thai, Turkish, or Russian.

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

How: Recommended replies are based on past chat transcripts and come from a list generated by Einstein and approved by you. This single-language pilot is a first step toward reply recommendations in multiple languages. To recommend replies in a supported non-English language, Einstein requires 10,000 closed chats with most chats in the target language. It's OK if some chats are in another language. When you don't have enough closed chats or the chats are too short, we let you know when you try to build the predictive model.

SEE ALSO:

Salesforce Help: [Prepare for Einstein Reply Recommendations (can be outdated or unavailable during release preview)](#)

Start with Fewer Transcripts and Increase Replies

Get started with Einstein Reply Recommendations when your org has 1,000 usable English closed chat transcripts. Previously, to enable Einstein to build a model and suggest replies to your agents, you needed at least 10,000 transcripts. Einstein can produce an initial list of reply templates and later perform a one-time refresh of your list.

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

How: To produce a list of common replies, Einstein needs 1,000 English closed chat transcripts with four or more chat turns. To find out what chat transcripts Einstein can learn from, see [Prepare for Einstein Reply Recommendations](#).

When you have enough usable transcripts, in Setup, enable Einstein Reply Recommendations. Then build a predictive model and publish replies as quick text from the initial reply templates. When there are 10,000 closed chats to learn from, Einstein rebuilds the model and

refreshes your reply template list. Review the templates and publish new replies so that you can put more responses at your agents' fingertips.

SEE ALSO:

Einstein Voice Wrap-Up

Help your agents capture call details quickly and easily with Einstein Voice Call Wrap-Up (pilot).

IN THIS SECTION:

Complete Calls with Ease via Einstein Voice Wrap-Up (Pilot)
Einstein Voice Wrap-Up analyzes each customer conversation as it happens and suggests field updates based on past Service Cloud Voice calls. When support agents transfer or complete a call, Einstein helps them update field values in a snap.
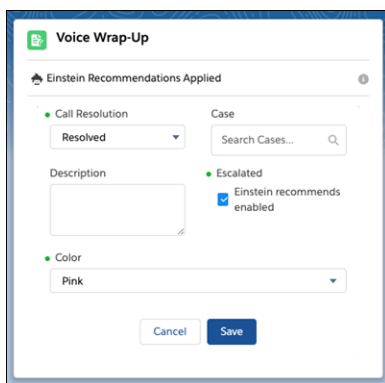
Complete Calls with Ease via Einstein Voice Wrap-Up (Pilot)

Einstein Voice Wrap-Up analyzes each customer conversation as it happens and suggests field updates based on past Service Cloud Voice calls. When support agents transfer or complete a call, Einstein helps them update field values in a snap.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions and requires Service Cloud Voice.

Why: Like Einstein Case Classification and Einstein Case Wrap-Up (pilot), Einstein Voice Call Wrap-Up suggests updates to field values. But, Case Classification and Case Wrap-Up recommend field updates on Case records. In contrast, Einstein Voice Call Wrap-Up learns from completed calls to suggest updates to Voice Call fields.

How: Recommendations appear in the Einstein Field Recommendations component, which you can add to the Lightning Service Console Voice Call layout or to the Lightning app of your choice. Agents click **Get Einstein Recommendations** to view predictions and can then review and save recommended updates. A green dot indicates a field with predictions.

To sign up for this pilot, contact your Salesforce Account Executive. When you set up Einstein Voice Call Wrap-Up, you select the Voice Call fields that you want Einstein to make recommendations for.

Field Service

Work smarter with advanced maintenance recurrence (generally available) to create maintenance work rules for individual assets on daily, weekly, monthly, or yearly recurring schedules. Use shift patterns to define recurring schedules so that your managers can quickly create and assign the usual shifts. Add scheduling criteria to shifts to match the right types of appointments to the right resource.

IN THIS SECTION:

Create Shifts Faster via Predefined Shift Patterns

Save time by creating a pattern of regularly scheduled shifts in one quick action. Your shift managers can select a pattern, such as a week's worth of regular hours, to create shifts in bulk for a service resource or service territory. Set the pattern to repeat or specify a date range.

Designate Shifts for Appointments that Meet Your Criteria

Fine-tune shift scheduling for your field service workers. For example, you can designate an on-call shift for emergency appointments only. Create a filter based on service appointment field values, then add the filter to a shift so that only appointments matching the criteria get scheduled.

Add Shift Management to Your Experience Cloud Sites

Give your Experience Cloud sites the gift of shift management. Add Shifts to your Experience Cloud sites or portals to let your users view and manage shifts.

Manage Product Campaigns

Whether it's for a product recall, manual firmware upgrade, or safety or compliance audit, you can improve the tracking, transparency, and reach of any product campaign while reducing costs.

Deliver Customers Their Service Work Entitlement

Ensure that your customers get their full entitlement of work orders and you don't give away free work orders that aren't covered by the entitlement. Track how many work orders were agreed to in the Work Orders Per Entitlement field. And track how many are still available in the Remaining Work Orders field.

See Who Provides or Services a Customer's Assets

Service Managers can easily see which accounts supply and service an asset. Related lists show the provided by and serviced by details for each asset.

See More Pricing Details on Product Consumed

Service managers can adjust prices and discounts more effectively with list price, subtotal, discount, and total price shown on the product consumed details.

Plan Ahead with Advanced Maintenance Recurrence

Service managers can now create maintenance work rules to cover elaborate daily, weekly, monthly, or yearly recurring maintenance activities. Set rules that apply to a maintenance plan and control maintenance more precisely with rules on individual assets.

Record More Details About Maintenance Plans

Notes offer rich text, lists, and images to help workers stay organized. The notes related list is now available on maintenance plans.

Get More Details On Contract Line Items

Service managers and workers can now see location, the place where service is performed, and the Files related list on contract items.

PK Chunking Support Added for ProductConsumed and ProductRequired

With PK chunking, you get better performance and reliability while using the API to extract large data sets from the ProductConsumed and ProductRequired objects.

Changes to the Self Service Permission Set

Salesforce is removing the View All, Modify All, Edit, and Delete object permissions on all objects for guest users. Guest users can have Read and Create object permissions only. This change can cause guest users to be removed from the Field Service Self Service permission set. In this case, you can manually remove the Edit FSL Operations object permission then reassign self service permissions to the relevant users.

Field Service Scheduling

Calculate more accurate travel times with point-to-point predictive routing. Get optimization insights at a glance. Improve scheduling with criteria that match relevant service appointments to shifts.

Field Service Mobile App

Share more data with users and groups before they go offline with Briefcase Builder. Track your mobile worker's arrival and get ready for your service appointment. Quickly update the status of a service appointment using quick actions.

Create Shifts Faster via Predefined Shift Patterns

Save time by creating a pattern of regularly scheduled shifts in one quick action. Your shift managers can select a pattern, such as a week's worth of regular hours, to create shifts in bulk for a service resource or service territory. Set the pattern to repeat or specify a date range.

Where: Shift patterns are available in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: First create shift templates that set the duration or job profile. Then define shift patterns that reference those templates. Use the New from Pattern action to create a set of repeating or date-defined shifts. Optionally, assign a service territory, service resource, or both to make scheduling a snap.

Connect REST API and Connect in Apex support creating shifts from patterns.

Designate Shifts for Appointments that Meet Your Criteria

Fine-tune shift scheduling for your field service workers. For example, you can designate an on-call shift for emergency appointments only. Create a filter based on service appointment field values, then add the filter to a shift so that only appointments matching the criteria get scheduled.

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: Create filters in the Recordset Filter Criteria object. Add filter conditions that match values in the service appointment fields that you pick. For example, you can create an Emergency appointments filter by adding a condition that the Emergency field is checked.

Now when you create or edit an on-call or evening shift, you can select the Emergency appointments filter in the Recordset Filter Criteria field. Scheduling and optimization employs the shift filter criteria to schedule only emergency appointments.

Add Shift Management to Your Experience Cloud Sites

Give your Experience Cloud sites the gift of shift management. Add Shifts to your Experience Cloud sites or portals to let your users view and manage shifts.

Where: This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Field Service and Experience Cloud.

Manage Product Campaigns

Whether it's for a product recall, manual firmware upgrade, or safety or compliance audit, you can improve the tracking, transparency, and reach of any product campaign while reducing costs.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

How: If your Salesforce org was created before Spring '21, add the Product Service Campaign Item related list to Product Service Campaign.

Create a product campaign for one or more products, then use Salesforce to identify the affected assets. Next create the work orders and return orders to execute the campaign. Track the status of work orders to ensure that the campaign is completed successfully.

Deliver Customers Their Service Work Entitlement

Ensure that your customers get their full entitlement of work orders and you don't give away free work orders that aren't covered by the entitlement. Track how many work orders were agreed to in the Work Orders Per Entitlement field. And track how many are still available in the Remaining Work Orders field.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

How: If your Salesforce org was created before Spring '21, add the Work Orders Per Entitlement and Remaining Work Orders fields to Entitlements.

See Who Provides or Services a Customer's Assets

Service Managers can easily see which accounts supply and service an asset. Related lists show the provided by and serviced by details for each asset.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

> *Salesforce Help*: Accounts (can be outdated or unavailable during release preview)

See More Pricing Details on Product Consumed

Service managers can adjust prices and discounts more effectively with list price, subtotal, discount, and total price shown on the product consumed details.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

> *Salesforce Help*: Guidelines for Consuming Inventory (can be outdated or unavailable during release preview)

Plan Ahead with Advanced Maintenance Recurrence

Service managers can now create maintenance work rules to cover elaborate daily, weekly, monthly, or yearly recurring maintenance activities. Set rules that apply to a maintenance plan and control maintenance more precisely with rules on individual assets.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

When: For Salesforce orgs created before the Spring '21 release, CRUD is enabled automatically within 24 hours of the release.

Why: Maintenance plans and their assets can require complex recurrence patterns, with maintenance tasks performed at different intervals. When maintenance tasks coincide, you want to choose whether to do some or all of them.

Advanced maintenance recurrence lets you create schedules for:

- **Maintenance plans without assets:** For example, for a cleaning service for a building, a general clean gets performed each workday and an additional sanitization clean happens every Friday.
- **Maintenance plans with multiple assets requiring the same maintenance scheduling:** For example, an installation has 500 HVACs that have the same monthly, quarterly, and yearly schedule maintenance.
- **Maintenance plans with most assets requiring the same maintenance scheduling:** For example, most of the treadmills at a gym only require quarterly maintenance but two older treadmills require monthly maintenance.
- **Maintenance plans with multiple assets requiring different maintenance schedules:** For example, a service station has weekly and monthly maintenance performed on its pumps while the fuel tanks are subject to quarterly and yearly inspection.

Advanced maintenance recurrence also lets you manage maintenance work with different precedents, 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.
- A pool maintenance company cleans a pool monthly and applies a chemical treatment every 3 months. In this case, the service manager wants the treatment work orders to go on in parallel with the pool cleaning work orders.

Also, by selecting the option to generate one work order line item per asset, you can accumulate work order line items that share a suggested maintenance date in one work order.

How: To enable maintenance work rules:

- In permission sets or profiles,

    - enable the Maintenance Work Rule tab.

    - enable Field Level Security on Maintenance Plan and Maintenance Asset fields on the Maintenance Work Rule for profiles.

- Add the Maintenance Work Rule related list to the maintenance plan and maintenance assets page layout.

- On the Maintenance Work Rule page layout, click **Maintenance Asset** properties in the **Maintenance Work Rule Detail** section and uncheck **Required** in the Field Properties for Maintenance Asset.

If all assets for a maintenance plan have the same service frequency, you can create a maintenance work rule for the maintenance plan. But if the assets on a maintenance plan have different service frequencies:

- when several assets share maintenance frequency, create a maintenance work rule on the maintenance plan, then

- create maintenance work rules for each asset that has a different maintenance frequency.

As you create the maintenance work rules, 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, lowest sort order, each rule generates a work order.

SEE ALSO:

Salesforce Help: Maintenance Plan Advanced Recurrence (can be outdated or unavailable during release preview)

Salesforce Help: View and Edit Tab Settings in Permission Sets and Profiles (can be outdated or unavailable during release preview)

Salesforce Help: Set Field Permissions in Permission Sets and Profiles (can be outdated or unavailable during release preview)

Record More Details About Maintenance Plans

Notes offer rich text, lists, and images to help workers stay organized. The notes related list is now available on maintenance plans.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

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

Salesforce Help: Create Maintenance Plans (can be outdated or unavailable during release preview)

Get More Details On Contract Line Items

Service managers and workers can now see location, the place where service is performed, and the Files related list on contract items.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

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

PK Chunking Support Added for ProductConsumed and ProductRequired

With PK chunking, you get better performance and reliability while using the API to extract large data sets from the ProductConsumed and ProductRequired objects.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile apps for iOS and Android in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Developers: Use PK Chunking to Extract Large Data Sets from Salesforce (can be outdated or unavailable during release preview)

Salesforce Developers: PK Chunking Header (can be outdated or unavailable during release preview)

Changes to the Self Service Permission Set

Salesforce is removing the View All, Modify All, Edit, and Delete object permissions on all objects for guest users. Guest users can have Read and Create object permissions only. This change can cause guest users to be removed from the Field Service Self Service permission set. In this case, you can manually remove the Edit FSL Operations object permission then reassign self service permissions to the relevant users.

Where: This change applies to guest users in Enterprise, Performance, Unlimited, and Developer editions.

How: If the View All, Modify All, Edit, and Delete object permissions are part of a permission set or permission group and assigned to a guest user, then the guest user is removed from the permissions set or permission set group. Guest users also lose access to all other permissions in those permission sets and permission set groups.

From Setup, in the Quick Find box, enter `Users`, and then select **Permission Sets**. Click **Field Service Self Service Permissions**, and then select **Object Settings**. Click **FSL Operations**, and then click **Edit**, and deselect the **Edit** permission.

Guest users who are removed from the Field Service Self Service permissions set because they have the Modify All, View All, Edit, or Delete object permissions sometimes lose other functionality. You can assign the updated permission set to the guest user or reassign the Field Service Self Service permission set to the relevant users.

SEE ALSO:

Release Note: View All, Modify All, Edit, and Delete Object Permissions Removed for Guest Users (can be outdated or unavailable during release preview)

Field Service Scheduling

Calculate more accurate travel times with point-to-point predictive routing. Get optimization insights at a glance. Improve scheduling with criteria that match relevant service appointments to shifts.

IN THIS SECTION:

Schedule Appointments During Shifts That Meet Your Criteria

Fine-tune shift scheduling for your team using filter criteria that match shifts to service appointments. After you set up your shift criteria, you can schedule appointments or use optimization to find the best schedule for your team and customers.

Get Smarter Travel Time Estimates with Point-to-Point Predictive Routing

Calculate travel times more precisely so that your workers spend less time driving and are more productive. Point-to-point predictive routing uses the exact service appointment location and considers time of day, so it's more accurate than aerial routing or street-level routing. Point-to-point predictive routing is gradually replacing predictive travel (beta) and is available in all scheduling and optimization operations.

See Results with Improved Optimization Insights (Generally Available)

Learn at a glance how global or in-day optimization affects your Key Performance Indicators (KPIs). Optimization Insights, now generally available, shows metrics before and after optimizations, and a new component summarizes Health Check results. For better accuracy, utilization includes shifts as a source of worker availability.

Schedule Appointments During Shifts That Meet Your Criteria

Fine-tune shift scheduling for your team using filter criteria that match shifts to service appointments. After you set up your shift criteria, you can schedule appointments or use optimization to find the best schedule for your team and customers.

Where: This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

Release Note: Designate Shifts for Appointments that Meet Your Criteria

Salesforce Help: Guidelines for Shift Availability (can be outdated or unavailable during release preview)

Get Smarter Travel Time Estimates with Point-to-Point Predictive Routing

Calculate travel times more precisely so that your workers spend less time driving and are more productive. Point-to-point predictive routing uses the exact service appointment location and considers time of day, so it's more accurate than aerial routing or street-level routing. Point-to-point predictive routing is gradually replacing predictive travel (beta) and is available in all scheduling and optimization operations.

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: New Salesforce orgs get point-to-point predictive routing by default. Existing orgs retain predictive travel (beta) and their configuration but can switch to point-to-point predictive routing.

To check what's enabled in your org, in the Field Service Admin app, go to **Field Service Settings** > **Scheduling** > **Routing**. If **Enable Point-to-Point Predictive Routing** isn't enabled, you can turn it on.

SEE ALSO:

 Salesforce Help: Set Up Routing for Travel Time Calculations (can be outdated or unavailable during release preview)

See Results with Improved Optimization Insights (Generally Available)

Learn at a glance how global or in-day optimization affects your Key Performance Indicators (KPIs). Optimization Insights, now generally available, shows metrics before and after optimizations, and a new component summarizes Health Check results. For better accuracy, utilization includes shifts as a source of worker availability.

Where: This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

How: In **Field Service Settings** > **Optimization**, enable **Optimization Insights**. Using Lightning App Builder, edit an optimization request page and add the four custom Lightning components. After a global or In-day optimization completes, the components provide metrics (1), KPIs by territory (2), a summary that includes optimization and scheduling policy details (3), and the new Health Check results (4).
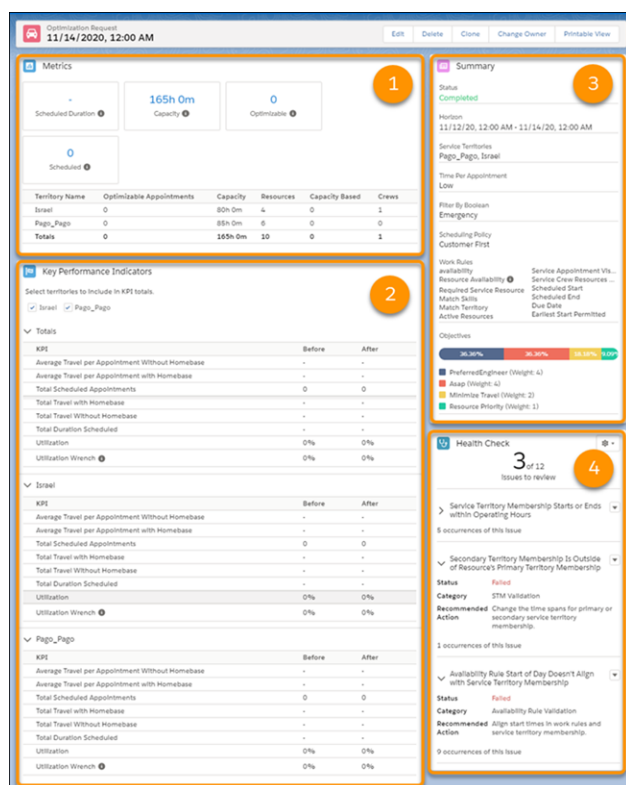
Salesforce Help: Gain Visibility into Optimizations with Optimization Insights (can be outdated or unavailable during release preview)

Field Service Mobile App

Share more data with users and groups before they go offline with Briefcase Builder. Track your mobile worker's arrival and get ready for your service appointment. Quickly update the status of a service appointment using quick actions.

IN THIS SECTION:

Briefcase Builder (Beta)

Explore a better way to make offline record data available to your users. The Briefcase Builder tool helps you select and share records offline with mobile workers. And you can create an offline platform experience that is flexible, easy to use, and responsive to mobile workers' needs.

Notify Customers When Workers Are Arriving

Appointment Assistant lets customers know when their mobile worker is arriving so that they have time to make COVID safety preparations or so they don't miss their service appointment. Appointment expirations you set stop customers from seeing a worker's location, and worker identification like name and photo provide safety and security for both workers and customers.

Update the Status of Your Service Appointment on the Go

Save taps by quickly accessing a flow to change the status of your service appointment using the quick actions menu.

Briefcase Builder (Beta)

Explore a better way to make offline record data available to your users. The Briefcase Builder tool helps you select and share records offline with mobile workers. And you can create an offline platform experience that is flexible, easy to use, and responsive to mobile workers' needs.

Where: The Briefcase Builder tool applies to Lightning Experience desktop and all Salesforce orgs that have Field Service (FS) enabled. This tool supports Salesforce Field Service mobile app for iOS and Android.
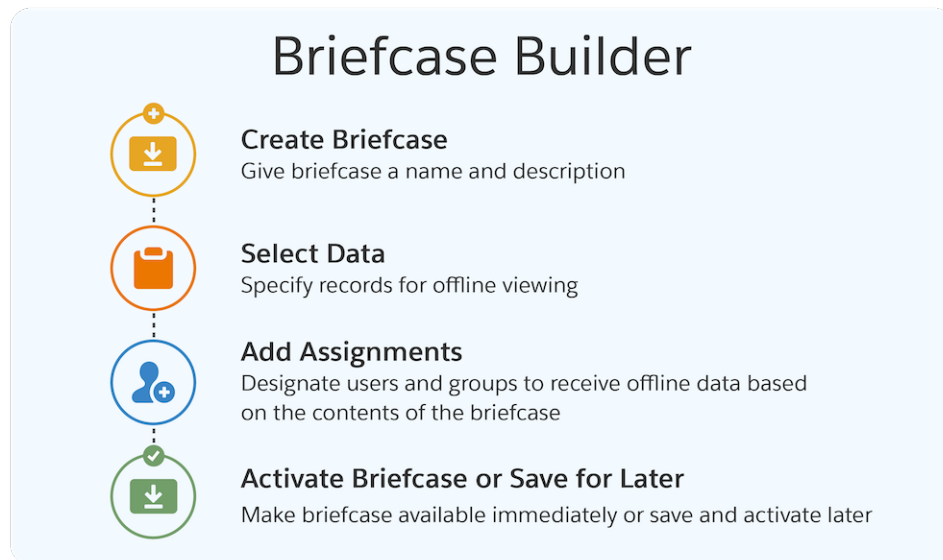
How: Create and name your briefcase, and select the objects to filter to records that you want users to view offline. Then you can assign users and groups to view the briefcase, and activate it immediately or later.
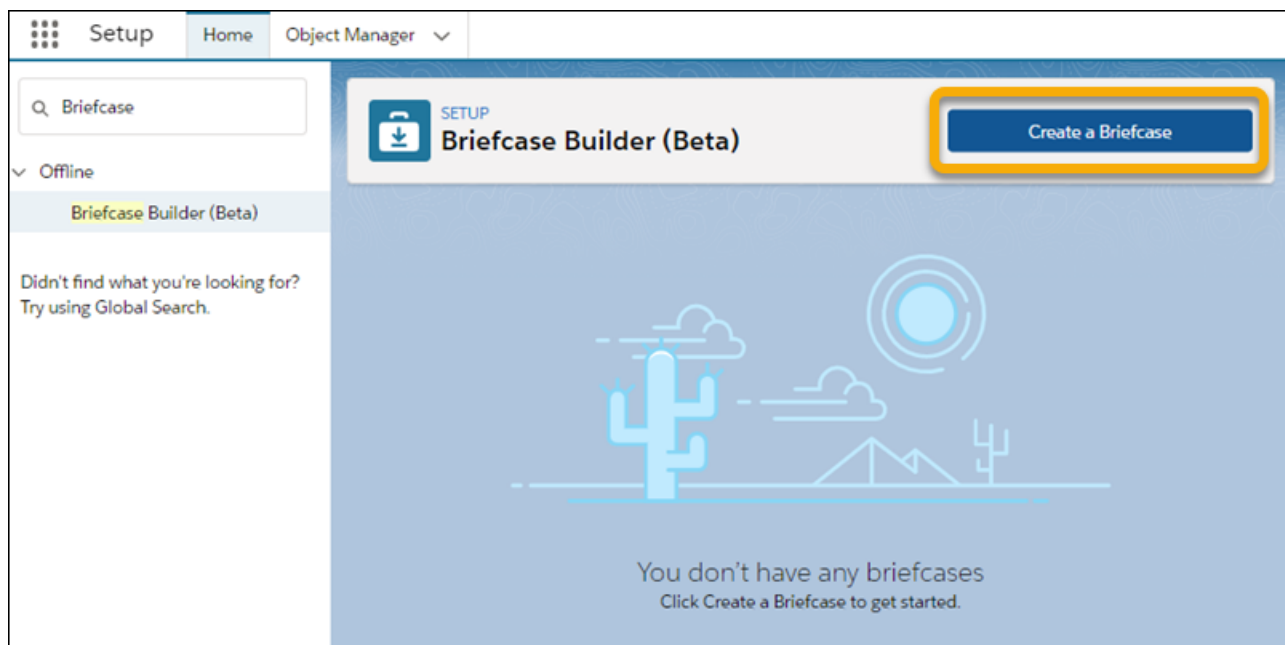
Note: Any use of this beta feature is subject to the Beta Services terms at Agreements and Terms.

SEE ALSO:

Salesforce Help: Briefcase Builder (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Offline Priming in the Field Service Mobile App

Notify Customers When Workers Are Arriving

Appointment Assistant lets customers know when their mobile worker is arriving so that they have time to make COVID safety preparations or so they don't miss their service appointment. Appointment expirations you set stop customers from seeing a worker's location, and worker identification like name and photo provide safety and security for both workers and customers.

Where: This change applies to Field Service for Android and iOS.

How: In settings, define the service appointment status that triggers the en route and estimated time of arrival messages. When the mobile worker selects that status, the customer gets texts with arrival and mobile worker details. You can also use messaging templates and create flows to simplify the process.
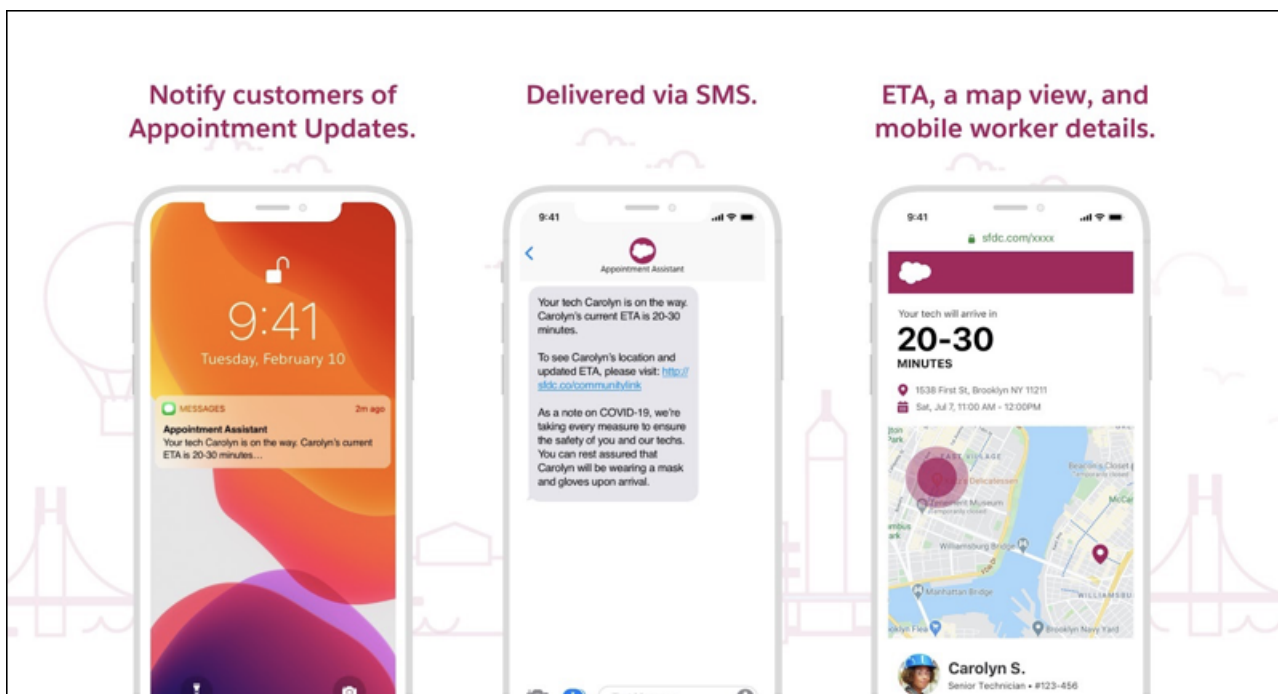
SEE ALSO:

Salesforce Help: Appointment Assistant for Field Service (can be outdated or unavailable during release preview)

Update the Status of Your Service Appointment on the Go

Save taps by quickly accessing a flow to change the status of your service appointment using the quick actions menu.

Where: This change applies to Field Service for Android and iOS.

How: From Setup, in the Quick Find box, enter `Field Service Mobile`, and then select **Field Service Mobile Settings**. Edit the required mobile settings profile. Then, under Quick Status Change, enter an existing flow name of type Field Service Mobile that the Quick Status Change action is applied to. In the Field Service Mobile app, the mobile worker can then open the quick actions menu from the appointment list and select **Change Status**.
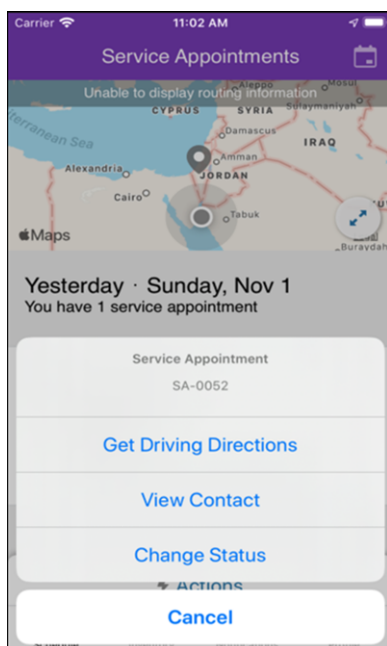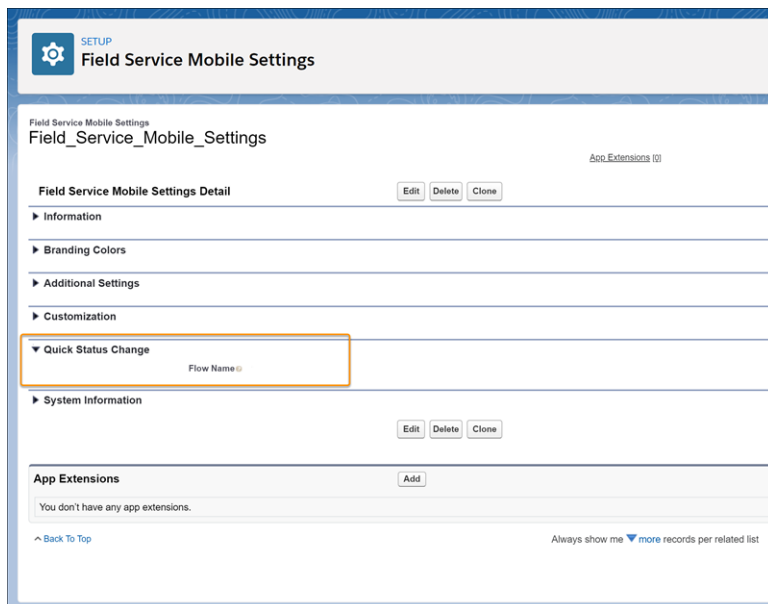
SEE ALSO:

Salesforce Help: Learn More About Field Service Mobile Settings (can be outdated or unavailable during release preview)

Service Setup Assistant

The fastest way to get started with Service Cloud now has more features included, so you can spend more time focusing on your customers. Use the new update tool to configure the latest features in one click: Chat and Messaging channels, Omni-Channel, Knowledge, Case Merge, Case Status Automation, and more. New walkthroughs help admins get acquainted with quick text and macros.

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 the Setup App. New users get all updates plus the features included in Winter '21. Existing users of the Service Setup Assistant can use the update tool to add new features.

How: To get started with Service, click **Service Setup Assistant** from the Setup menu.
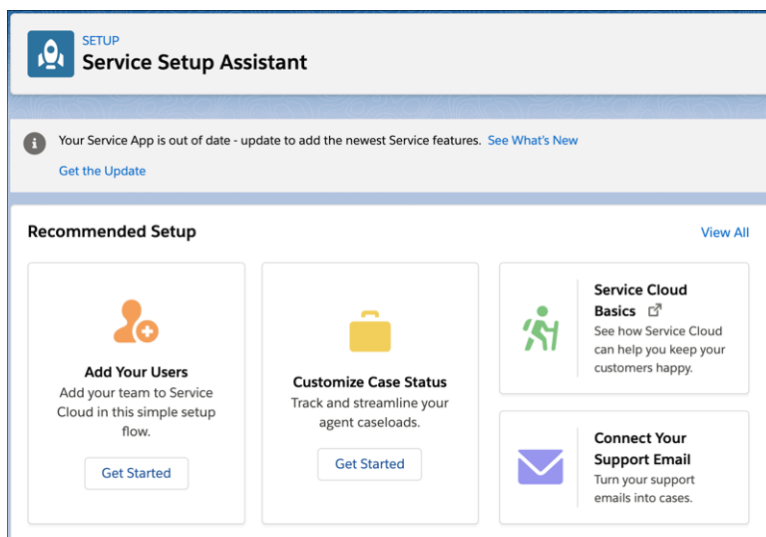
Channels

Voice setup is faster and more automated, so you can get your contact center up and running quickly. Give your customers the option to request a callback instead of waiting on hold. Voice is now integrated with High-Velocity Sales so sales reps can reach more customers. Link your messaging templates to specific channels with a new metadata option.

IN THIS SECTION:

Voice

Several key steps of the Service Cloud Voice setup process are now automated so your agents can get straight to delivering a personalized phone experience to your customers. Customers can opt to receive a callback instead of waiting on hold. Voice resiliency keeps your contact center running smoothly. Integration with High Velocity Sales, call recording collaboration options, and update reminders help you and your users make the most of Voice. And we've published new documentation to help you customize your Voice contact center.

Messaging

Connect your agents and customers more efficiently with better metadata for messaging templates.

Voice

Several key steps of the Service Cloud Voice setup process are now automated so your agents can get straight to delivering a personalized phone experience to your customers. Customers can opt to receive a callback instead of waiting on hold. Voice resiliency keeps your contact center running smoothly. Integration with High Velocity Sales, call recording collaboration options, and update reminders help you and your users make the most of Voice. And we've published new documentation to help you customize your Voice contact center.

IN THIS SECTION:

Get Your Contact Center Up and Running Faster

Cross more tasks off your to-do list. Several setup steps are now automated to help you set up a Service Cloud Voice contact center faster than ever.

Save Customers Time and Frustration with Queued Callback

No one likes to wait in line, especially for customer support. Respect your customers' time and save them phone minutes by giving them the option to request a callback. Customers aren't stuck on hold, and agents can promptly return customer calls.

Integrate Service Cloud Voice with High Velocity Sales

Maximize your sales reps' productivity by combining Service Cloud Voice with High Velocity Sales. Sales reps can click-to-dial records that come from a sales cadence, My List, and their Work Queue, so they can quickly make outbound calls in Voice. When a rep finishes a call, the call step in the sales cadence is automatically marked as complete, so the sales cadence advances to the next step. When sales reps complete their call, a task is automatically created for every voice call record so it's easier for reps to follow up with prospects.

Collaborate on Call Recordings to Improve Customer Service

When agents and supervisors listen to customer call recordings, they can comment directly on the recording instead of taking copious notes. Collaborate by adding comments, ask questions, and mention colleagues using the familiar Chatter-like commenting tool. Annotated call recordings in Service Cloud Voice improve customer service, increase agent productivity, and enhance agent training.

Give Agents Time for After-Conversation Work (Pilot)

Most service calls require closing work after the call ends—for example, the agent may want to send an email, update a case, or finalize call notes. After Conversation Work (ACW) helps supervisors set and manage the amount of time agents spend on after-call work. And it helps agents know roughly how much time to spend on those tasks.

Link Calls to the Right Contact Record (Beta)

It's easier for agents to link a call to the right contact even when the contact record's phone number doesn't include the country code. Salesforce searches for contact records that match some of the phone number and prompts the agent to link the call to a contact record.

Scale Your Contact Center with Voice Resiliency and Increased Voice Platform Limits

Let your agents help more customers at a time and reduce your call backlog. Voice resiliency lets your contact center scale when call volume surpasses the limit or when the background service that powers Voice is affected. Support twice as many customers with Service Cloud Voice's increased platform limits for concurrent calls and utterances.

See When Updates Are Available for Your Contact Center

Quickly update your contact center in Salesforce with a click of a button. If there's an update available, you see a notification when you log in to Salesforce and in the Contact Centers setup page. The notification includes a link to details about the update. You can install the latest version of the contact center from the Contact Centers setup page or from the Contact Center details page.

See When Your Key Pair Expires

Get a reminder when your public-private key pair is about to expire so you can update it in time. If your key pair is close to expiring or already expired, you see a notification when you log in to Salesforce and on the Contact Centers setup page. The notification includes a link to the Contact Centers setup page where you can quickly update your key pair.

Introducing New Service Cloud Voice Documentation

Admins and developers, it's time to curl up with some great new documentation. Check out the new key concepts overview, sample code, examples of common use cases, and a handy learning map that includes links to Service Cloud Voice resources.

Update to the Latest Telephony Integration API

In the Winter '21 release, we modified the Create Transcript REST API for improved security. Specifically, the participant ID moved from the URI to the payload. The old API will stop working on March 15, 2021. This change also affects a Lambda function in your contact center that uses this API. If you installed Service Cloud Voice in the Winter '21 release or earlier, be sure to update your contact center to the latest version.

Warm Up Your Lambda Functions and Get Real-Time Transcription in More Languages in Voice

To prevent call delays in Service Cloud Voice caused by Lambda function cold starts, warm up your Lambda functions by leveraging AWS EventBridge. Add real-time transcription for conversations in Italian, German, Japanese, Korean, and Brazilian Portuguese, so your agents can focus on helping your customers instead of taking notes.

Get Your Contact Center Up and Running Faster

Cross more tasks off your to-do list. Several setup steps are now automated to help you set up a Service Cloud Voice contact center faster than ever.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Who: Users with the Contact Center Admin permission set can create and manage Service Cloud Voice contact centers.

Why: When you create a contact center, we now take care of these steps for you.

- Contact flows are configured, so you don't have to manually upload and configure them in Amazon Connect.
- The connected app and permission set for single sign-on (SSO) are configured. The permission set is ready to assign to your contact center users.
- The agent presence status for signing into Omni-Channel is created and added to the Service Cloud Voice permission set.
- The Call Recording Player and the Chatter Feed components are available on the Voice Call record page by default. Previously, you manually added them to the page.

> 📝 Note: If you use a customized Voice Call page in your Salesforce org, the changes to the page layout don't affect your page. If you use the default Voice Call page in your org, then users see the Call Recording Player and the Chatter Feed components on it.

How: To use the default Voice Call page, go to Lightning App Builder and select the Voice Call record page. Customize the page, then activate it.

If you're using call recordings for the first time, complete these steps.

- Update your security profile in Amazon Connect to allow agents to listen to call recordings.
- Make sure agents have the Contact Center Agent permission set and View Call Recordings user permission.

SEE ALSO:

Salesforce Help: Set Up Service Cloud Voice (can be outdated or unavailable during release preview)

Save Customers Time and Frustration with Queued Callback

No one likes to wait in line, especially for customer support. Respect your customers' time and save them phone minutes by giving them the option to request a callback. Customers aren't stuck on hold, and agents can promptly return customer calls.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

When: The updated Sample_SCV_Inbound_Flow_With_Transcription contact flow is available in the Service Cloud Voice Github repository on February 13, 2021. The contact flow is automatically available in contact centers created after February 13, 2021.

Why: Increase customer satisfaction by letting them choose whether to wait for an available support agent when call volume is heavy.

Queued callback also reduces telephony costs and improves agent utilization. Telephony costs are billed per minute, so fewer customers on hold means fewer minutes used. Agents can stay productive when call volumes decrease by returning customers calls in the callback queue. When callers opt for a callback, the callback request goes into a queue and is pushed to an available agent in the Omni-Channel Call Controls tab. When the agent accepts the request, the outbound call is initiated.

How: Agent-first queued callback is provided via the Sample_SCV_Inbound_Flow_With_Transcription contact flow.

If your contact center was created before Spring '21, download the updated Sample_SCV_Inbound_Flow_With_Transcription from the Service Cloud Voice Github repository. Import the contact flow into your Amazon Connect instance. Configure the contact flow blocks to reflect your company's business practices, and then publish the flow.

If your contact center was created after Spring '21, the contact flow is already available in your contact center. Configure the blocks to reflect your company's business practices, and then publish the flow.

SEE ALSO:

> *Service Cloud Voice Implementation Guide*: Give Customers the Option to Request a Callback (can be outdated or unavailable during release preview)

Integrate Service Cloud Voice with High Velocity Sales

Maximize your sales reps' productivity by combining Service Cloud Voice with High Velocity Sales. Sales reps can click-to-dial records that come from a sales cadence, My List, and their Work Queue, so they can quickly make outbound calls in Voice. When a rep finishes a call, the call step in the sales cadence is automatically marked as complete, so the sales cadence advances to the next step. When sales reps complete their call, a task is automatically created for every voice call record so it's easier for reps to follow up with prospects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Who: Users must have both Service Cloud Voice and High Velocity Sales licenses to use this feature.

How: Set up Service Cloud Voice and High Velocity Sales in your org and create sales cadences that include calls.

SEE ALSO:

> *Salesforce Help*: Set Up Service Cloud Voice (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Set Up High Velocity Sales (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Create and Activate a Sales Cadence (can be outdated or unavailable during release preview)

Collaborate on Call Recordings to Improve Customer Service

When agents and supervisors listen to customer call recordings, they can comment directly on the recording instead of taking copious notes. Collaborate by adding comments, ask questions, and mention colleagues using the familiar Chatter-like commenting tool. Annotated call recordings in Service Cloud Voice improve customer service, increase agent productivity, and enhance agent training.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Who: Users with the Can View Call Recordings permission can listen to and collaborate on call recordings.

How: Click the white space above the progression bar in the call recording and enter your comment. Click the diamond icon to open a comment (1). Click **Comment** to reply to a thread (2). You also can view, add comments, and edit comments on a call recording in the Chatter Feed component (3).
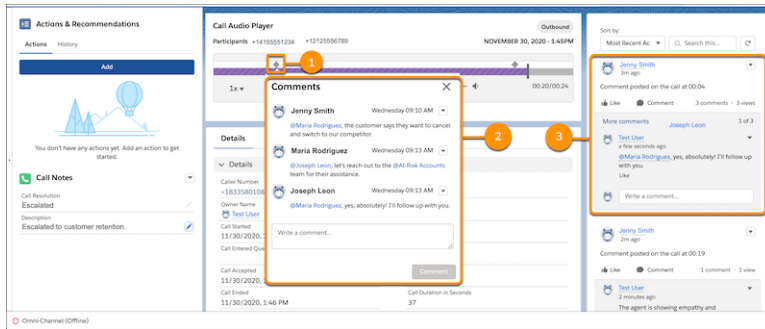
Salesforce Help: Listen to and Collaborate on Call Recordings (can be outdated or unavailable during release preview)

Give Agents Time for After-Conversation Work (Pilot)

Most service calls require closing work after the call ends—for example, the agent may want to send an email, update a case, or finalize call notes. After Conversation Work (ACW) helps supervisors set and manage the amount of time agents spend on after-call work. And it helps agents know roughly how much time to spend on those tasks.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

> **Note:** As a pilot feature, After Conversation Work 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: Previously, agents kept the call record open in the console while they performed after-conversation tasks. Then they closed the record tab to free up their capacity. The after-conversation period now begins the moment a call ends. Agents can exit the period early by closing the call record or they can let it run its course. When time is up, the agent is considered available to help the next customer regardless of whether they closed the call record.

How: Contact your Salesforce representative to join the After Conversation Work pilot.

To add after-conversation work time to Voice calls, create or edit your Voice Call service channel. Select the option to give agents wrap-up time after a conversation ends and enter a maximum number of seconds for the work period. All agents in the channel then receive the after-conversation work time before being routed to the next conversation.

Pilot Considerations:

- After Conversation Work doesn't work with a status-based capacity model.

- Supervisors don't have a way to view agents' after-conversation work time in real time, but they can report on it.

- Agents don't have a way to view their after-conversation work countdown.

Link Calls to the Right Contact Record (Beta)

It's easier for agents to link a call to the right contact even when the contact record's phone number doesn't include the country code. Salesforce searches for contact records that match some of the phone number and prompts the agent to link the call to a contact record.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

> **Note:** As a beta feature, Channel-Object Linking 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.

Who: Users with the Contact Center Agent permission set can answer and make phone calls and view call records.

Why: For example, suppose that a customer with the phone number +1 415-555-1234 calls your contact center. Your org has three contact records for this customer, and each record has a variant of the customer's phone number:

- Contact record 1's phone number is 415-555-1234

- Contact record 2's phone number is 1-415-555-1234

- Contact record 3's phone number is +1 415-555-1234

The channel-object linking logic ignores the country code and matches the remaining digits. The logic recognizes that all three contact records match the caller's number, so Salesforce suggests them as matches and prompts to the agent to link the call. Previously, the object-linking logic suggested a match only when all digits of a phone number matched a Contact record.

How: To set up channel-object linking for phone calls, go to Setup, turn on channel-object linking and add linking rules. If channel-object linking for phone calls is already set up in your org, this enhancement automatically works.

SEE ALSO:

Salesforce Help: Add Channel-Object Linking Rules for Phone Calls (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Agent Experience for Channel-Object Linking (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Link Calls with Customer Contact Records (can be outdated or unavailable during release preview)

Scale Your Contact Center with Voice Resiliency and Increased Voice Platform Limits

Let your agents help more customers at a time and reduce your call backlog. Voice resiliency lets your contact center scale when call volume surpasses the limit or when the background service that powers Voice is affected. Support twice as many customers with Service Cloud Voice's increased platform limits for concurrent calls and utterances.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Why: Telephony is a mission-critical service that customers turn to for sensitive and urgent concerns. Voice now supports up to 2,000 concurrent conversations and allows up to 400 utterances per second.

Voice resiliency ensures that the telephony system stays operational when the number of conversations is over limit or when the background service is affected. Callers are still connected to agents, but call transcription and object-linking don't work.

> 📝 Note: Your telephony provider's limits can affect scaling. See your telephony provider 's documentation on applicable limits.

Previously, Voice supported a maximum of 1,000 concurrent conversations and 200 utterances per second. Previously, when the number of calls was maxed out, no other calls were connected until the numbers went down.

How: Voice platform limit increases and Voice resiliency are automatically enabled for all Voice contact centers.

SEE ALSO:

Service Cloud Voice Implementation Guide: Service Cloud Voice Limits and Scaling (can be outdated or unavailable during release preview)

Amazon Connect Administrator Guide: Amazon Connect service quotas

Salesforce Help: Increase Amazon Service Quotas (can be outdated or unavailable during release preview)

See When Updates Are Available for Your Contact Center

Quickly update your contact center in Salesforce with a click of a button. If there's an update available, you see a notification when you log in to Salesforce and in the Contact Centers setup page. The notification includes a link to details about the update. You can install the latest version of the contact center from the Contact Centers setup page or from the Contact Center details page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Who: Users need the Customize Application permission to view the Contact Centers setup page and the Contact Center Admin permission set to create and manage Service Cloud Voice contact centers.

Why: Salesforce occasionally adds AWS Lambda functions, makes improvements to the Lambda functions, AWS identity and access management roles (IAM roles) policies, enhances security, and enables new features. Updating the contact center installs the latest version and also updates the public-private key pair. Previously, admins manually updated their contact centers in AWS.

How: To see what's included in the update, click **Learn More** in the notification on the Contact Center setup page (1). To see which version your contact center is running, check the **Version** column in the Contact Center setup page or check the Contact Center details page (2). To install the latest version of the contact center, click **Install Updates** for your contact center in the Contact Center setup page (3) or in the Contact Center details page.

When you update your contact center, the updates overwrite the Lambda functions. If your contact center uses customized Lambda functions, reconfigure them after updating the contact center.
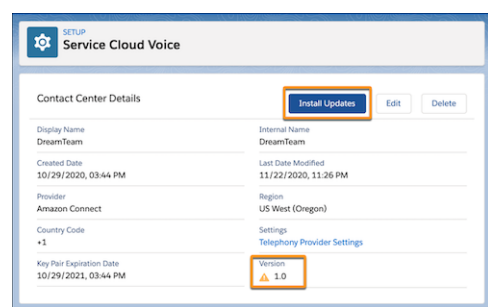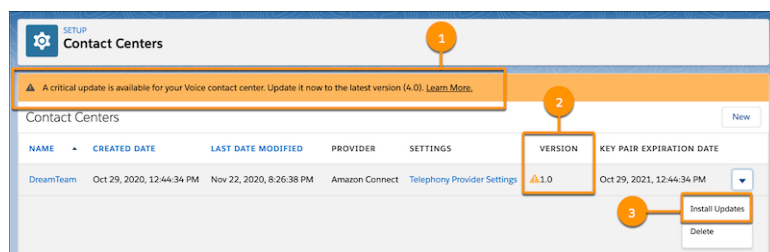
SEE ALSO:

See When Your Key Pair Expires

Salesforce Help: Update Your Contact Center (can be outdated or unavailable during release preview)

Knowledge Article: Service Cloud Voice Contact Center Updates

See When Your Key Pair Expires

Get a reminder when your public-private key pair is about to expire so you can update it in time. If your key pair is close to expiring or already expired, you see a notification when you log in to Salesforce and on the Contact Centers setup page. The notification includes a link to the Contact Centers setup page where you can quickly update your key pair.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

Who: Users with the Contact Center Admin permission set can create and manage Service Cloud Voice contact centers.

Why: Voice uses public-private key pairs to authenticate the telephony service request between Amazon Web Services and Salesforce. For security reasons, these key pairs expire after one year. If a key pair expires, then your contact center can't connect to the service and customer calls go unanswered. Update your key pair before it expires from the Contact Centers setup page.

The first notification appears 30 days before a key pair's expiration date. If you dismiss the notification but don't update, another notification appears five days before expiration and shows the expiration date. If the key pair expires, another notification is shown.

How: If your contact center was created before Winter '21, update your contact center to the latest version so you can see the **Update Key** button in the Contact Centers setup page.

Check the Contact Center setup page (1) or details page to see when the key pair expires. To generate a new key pair, click **Update Key** in the actions menu for your contact center in the Contact Center setup page (2) or in the Contact Center details page.
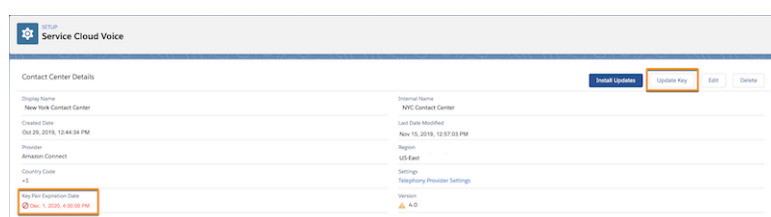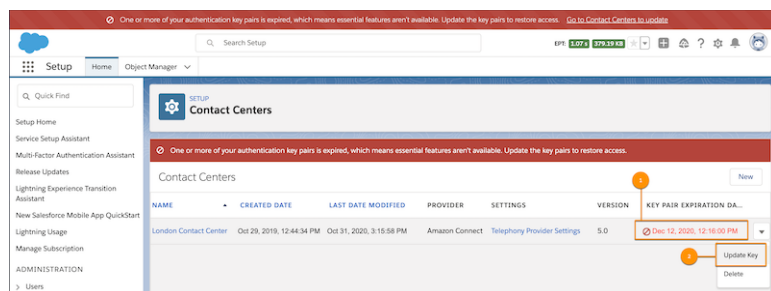
SEE ALSO:

    Salesforce Help: Update the Key Pair for Your Contact Center (can be outdated or unavailable during release preview)

Introducing New Service Cloud Voice Documentation

Admins and developers, it's time to curl up with some great new documentation. Check out the new key concepts overview, sample code, examples of common use cases, and a handy learning map that includes links to Service Cloud Voice resources.

Why: Explore the following new resources.

Service Cloud Voice Learning Map

    Find all the resources you need to roll out a Service Cloud Voice contact center. Review demos and customer stories as well as detailed documentation for creating and customizing your contact center, helping customers on the phone, and keeping your center current.

Service Cloud Voice Key Concepts (can be outdated or unavailable during release preview)

    Get to know the terms we use to talk about telephony, like contact center, Interactive Voice Response (IVR), and contact flow.

Examples of Common Use Cases

    Review detailed, end-to-end instructions for implementing common use cases. For example, learn how to link a new or existing case to a Voice Call record and give customers an option in the IVR to switch to SMS.

Service Cloud Voice GitHub Repository

    Access sample code for building out Service Cloud Voice, including contact flows and resources for the use case examples.

AWS GitHub Repository

    While we can't take credit for it, we want to make sure you know about it. Much like the Service Cloud Voice repo, this repo contains sample code that you can use to customize your implementation of Voice, particularly on the Amazon Connect side. Learn how to implement common use cases such as voicemail.

Update to the Latest Telephony Integration API

In the Winter '21 release, we modified the Create Transcript REST API for improved security. Specifically, the participant ID moved from the URI to the payload. The old API will stop working on March 15, 2021. This change also affects a Lambda function in your contact center that uses this API. If you installed Service Cloud Voice in the Winter '21 release or earlier, be sure to update your contact center to the latest version.

Where: This change applies to Lightning Experience in the Enterprise 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 or accessing Lambda functions that use this API must update to this new API.

Why: After the deactivation date, calling the old Create Transcript REST API will result in a 404 "Not found" error, and transcripts will not be created.

When: The old API deactivates on March 15, 2021.

How: To determine if your contact center requires an update, follow these instructions on February 15, 2021 or later:

1. Log in to Salesforce.

2. From Setup, in the Quick Find box, enter `Contact Center`, and then click **Contact Centers**.

3. Select the contact center that you want to update. After you select a contact center, if there are updates to make, you see a banner with a link to install updates.

4. Click **Install Updates**. A confirmation window opens. In the confirmation window, click **Install Updates**.

> 📝 Note: This update overwrites Lambda functions that Salesforce provides. If you made changes to these functions, make a copy of your changes so you can reapply them after the update. This update doesn't affect contact flows.

If applicable, update any custom code you wrote that directly uses the Create Transcript REST API.

1. 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`

2. 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

Warm Up Your Lambda Functions and Get Real-Time Transcription in More Languages in Voice

To prevent call delays in Service Cloud Voice caused by Lambda function cold starts, warm up your Lambda functions by leveraging AWS EventBridge. Add real-time transcription for conversations in Italian, German, Japanese, Korean, and Brazilian Portuguese, so your agents can focus on helping your customers instead of taking notes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license in Service Cloud and Sales Cloud.

When: These services are available for orgs where Voice is set up on February 17, 2021.

Who: Salesforce admins with the Contact Center Admin permission set can create and update Service Cloud Voice contact centers. AWS admins can configure AWS EventBridge and AWS Transcribe services with Service Cloud Voice.

Why: When working with Lambda functions in a Voice interaction, fast response times are critical. With AWS Lambda, if a function hasn't been used in a while, the resources allocated to it can be redistributed elsewhere. This reallocation can cause a delay the next time the function is run. To prevent Lambda function cold starts, use Amazon EventBridge to periodically call the Lambda function, so it can execute quickly.

Real-time call transcription in Voice is provided via AWS Transcribe. By default, transcription is set to American English (`languageCode`). You can modify the kvsTranscriber Lambda function on your contact flows to generate a call transcription in a specified language. For example, if your callers speak Italian, you can modify the language code on the Lambda function so that it transcribes to Italian. Previously, real-time transcription was available only for English, French, and Spanish.

How: To use AWS EventBridge to periodically call the Lambda functions, follow the instructions on the AWS Service Cloud Voice Repository in Github to update the Lambda functions.

To show real-time transcription in Italian, German, Japanese, Korean, or Brazilian Portuguese:

1. In Salesforce, update your contact center to get the latest Lambda functions.

2. In Amazon Connect, set the `languageCode` on the transcription block in your contact flows to the transcription language. For example, to transcribe to Italian, enter `it-IT`. For more info about supported languages and language codes, see Streaming Transcription in the AWS Transcribe Developer Guide.

SEE ALSO:

See When Updates Are Available for Your Contact Center

Knowledge Article: Service Cloud Voice Contact Center Updates

Service Cloud Voice Implementation Guide: How to Use Salesforce Lambda Functions

AWS Transcribe Developer Guide: Streaming Transcription

AWS Service Cloud Voice Repository: Keeping Lambda Functions Warm

Messaging

Connect your agents and customers more efficiently with better metadata for messaging templates.

IN THIS SECTION:

Boost Your Messaging Templates with More Metadata

Organize and track templates better with new metadata. Restrict templates to one channel and message intent without leaving the New Template window within setup.

Stop Messages Sent via Old Channels

Previously, even if you made a channel inactive, customers could send messages that agents did not receive. Now, an error message appears when you try to set a channel to inactive in Setup. Instead log a ticket with Salesforce to remove any channels you no longer want to use.

IsOptedOut Is Being Retired

IsOptedOut was retired in 228. Previously, agents could opt-out users with the IsOptedOut field. Now, use MessagingConsentStatus to opt-out users and distinguish between implicit, explicit, and double consent. Use IsFullyOptedIn to determine whether you can communicate with a Messaging End User.

Boost Your Messaging Templates with More Metadata

Organize and track templates better with new metadata. Restrict templates to one channel and message intent without leaving the New Template window within setup.

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

How: Specify the channel or channels your template applies to from the channels section of New Template window. You can set a message tag for Facebook templates and a template category for WhatsApp templates from the same section.

SEE ALSO:

Salesforce Help: Create Templates for Automatic Message Notifications (can be outdated or unavailable during release preview)

Stop Messages Sent via Old Channels

Previously, even if you made a channel inactive, customers could send messages that agents did not receive. Now, an error message appears when you try to set a channel to inactive in Setup. Instead log a ticket with Salesforce to remove any channels you no longer want to use.

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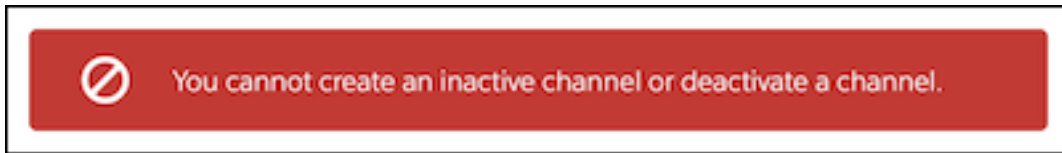
How:

IsOptedOut Is Being Retired

IsOptedOut was retired in 228. Previously, agents could opt-out users with the IsOptedOut field. Now, use MessagingConsentStatus to opt-out users and distinguish between implicit, explicit, and double consent. Use IsFullyOptedIn to determine whether you can communicate with a Messaging End User.

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

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: MessagingEndUser Object (can be outdated or unavailable during release preview)

Knowledge

Use the Service Setup Assistant to quickly and easily configure your initial Knowledge setup. Add text captions to images for screen readers. Keep previously attached files when adding articles with attachments to email. See the latest version of a favorite article when that article is updated.

IN THIS SECTION:

Use the Service Setup Assistant to Configure Knowledge

Knowledge is now part of the Service Setup Assistant, so you can create your initial Knowledge configuration faster and more easily. Knowledge is set up by default with the Service Setup Assistant if your Salesforce org has at least one Knowledge license.

Point Your Favorites to the Latest Versions of Articles

Keep your articles updated and eliminate searching for the latest version. If you mark an article a favorite and then it's updated, when you select the article you're now redirected to the latest version. Previously, the favorite still pointed to the older version.

Retain Attached Files When Inserting an Article into an Email

No more lost or overwritten articles in email. Now when you insert articles and related files in email via Insert Article, any previous files that you added stay put. Previously, the new attached files replaced the original files.

Add Alt Text to Images in Lightning Knowledge

Screen readers now can show alt text captions to describe images in Knowledge articles. Previously, this functionality was available in Salesforce for Classic Knowledge. The functionality is now also available in Lightning Experience.

Use the Service Setup Assistant to Configure Knowledge

Knowledge is now part of the Service Setup Assistant, so you can create your initial Knowledge configuration faster and more easily. Knowledge is set up by default with the Service Setup Assistant if your Salesforce org has at least one Knowledge license.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.Not available in Salesforce Classic.

Why: With the Service Setup Assistant you can set up many Salesforce Service features at once. Enhanced for Spring '21, the Service Setup Assistant now lets you:

- Enable Lightning Knowledge.
- Create a new Knowledge Manager custom profile and permission set.
- Add Knowledge permissions to the agent and supervisor custom profiles.
- Create Lightning Knowledge default fields and a default page layout and assign it to the agent, supervisor, and Knowledge Manager profiles.

How: When you create users via the Service Setup Assistant, they can only view Knowledge Articles. To allow them to create and publish articles, assign them Knowledge User licenses. From **Setup**, go to **Users** and edit their user profiles to assign them the Knowledge User licenses.

SEE ALSO:

Service Setup Assistant

Point Your Favorites to the Latest Versions of Articles

Keep your articles updated and eliminate searching for the latest version. If you mark an article a favorite and then it's updated, when you select the article you're now redirected to the latest version. Previously, the favorite still pointed to the older version.

If you create a new version as a draft, the original favorited published version is still shown.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

How: You can add favorites only for specific versions of Knowledge articles. Access to favorites is based on permissions. Favorites now follow these rules for Knowledge articles.

- If the newest version is published, the favorite points to it.
- If the newest version was published recently, you must refresh your browser for that version to appear as a favorite.
- If the favorite currently points to an older published version, and the newest version is a draft, the favorite continues to point to the published version.
- If no published version exists, the favorite points to the latest draft version. If no published or draft version exists, the favorite points to the latest archived version.

- The favorite points to the newer version in the same language as the older, published version. For example, if you have a favorite published version in English and you publish a new version in Spanish, the favorite continues to point to the English version. If you publish a new English version, the favorite points to the new version.

SEE ALSO:

IdeaExchange: Lightning Knowledge - Favorites Should Always Pull Most Current Article Version

Retain Attached Files When Inserting an Article into an Email

No more lost or overwritten articles in email. Now when you insert articles and related files in email via Insert Article, any previous files that you added stay put. Previously, the new attached files replaced the original files.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled. Not available in Salesforce Classic.

How: On the Knowledge object, select the article you want and choose **Insert Article into Email** from the dropdown menu.
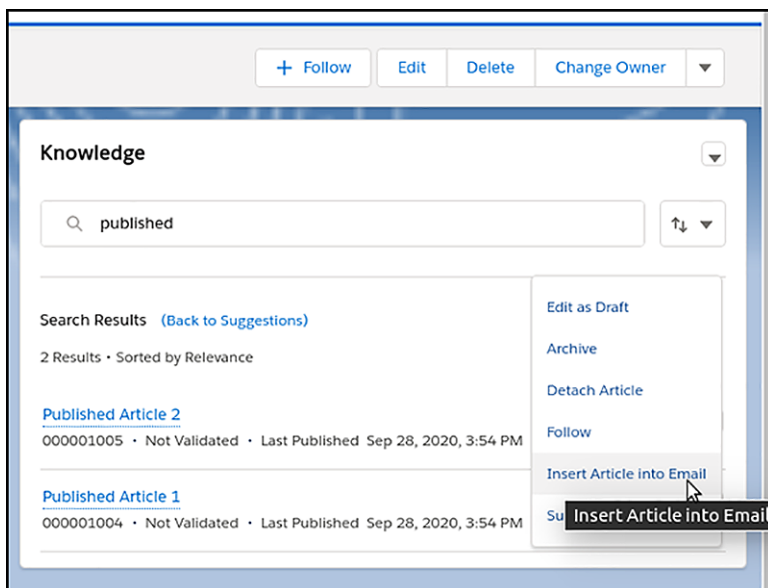
Add Alt Text to Images in Lightning Knowledge

Screen readers now can show alt text captions to describe images in Knowledge articles. Previously, this functionality was available in Salesforce for Classic Knowledge. The functionality is now also available in Lightning Experience.

Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

How: When you insert an image into a Knowledge article, you're prompted to provide a caption.
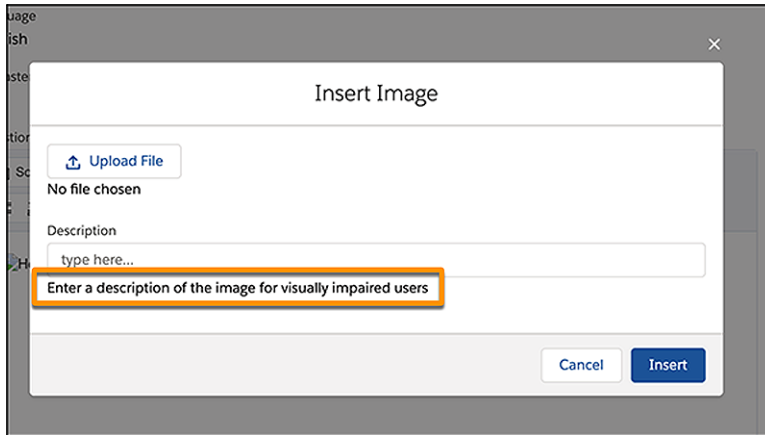
Routing

The After-Conversation Work (pilot) gives agents time to finish work after the conversation ends.

IN THIS SECTION:

[Give Your Agents Time to Complete the Conversation (Pilot)](#)

After a conversation, your agents often need time to make notes, send an email, or update the work item. Use After Conversation Work (ACW) to specify how much time to give agents before before they're available to receive more work. The ACW pilot is available for Voice Call channels.

Give Your Agents Time to Complete the Conversation (Pilot)

After a conversation, your agents often need time to make notes, send an email, or update the work item. Use After Conversation Work (ACW) to specify how much time to give agents before before they're available to receive more work. The ACW pilot is available for Voice Call channels.

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 in Service Cloud and Sales Cloud.

> ✏️ Note: As a pilot feature, After Conversation Work 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.

SEE ALSO:

[Give Agents Time for After-Conversation Work (Pilot)](#)

Case Management

Choose your org's default FROM address for certain Case-related notifications, skip the tricky entitlement setup process by customizing prebuilt ones, and restrict users from using the Interaction Layout Assignment to view profiles they don't own. Tab switching lets you create Macros across tabs without switching back and forth from the Lightning App builder, and an extended enforcement date for the Winter '21 Email-to-Case Release Update gives admins more time to prepare their orgs.

IN THIS SECTION:

Customize Your Default No-Reply Address for Email Notifications

Before the Spring '21 update, certain email notifications automatically send from noreply@salesforce.com when **Send Case Notifications from System Address** is on. Now, you can choose which email address your org uses as the default FROM address for certain Case related notifications.

Keep Profiles Safe from Prying Eyes with Profile Filtering for Interaction Layout Assignment

Admins now have more control over agent permissions and how they assign exceptions. When it's turned on, Profile Filtering restricts users from viewing any profiles via Interaction Layout Assignment other than their own.

Integrate with Entitlements to Supercharge Your Org

With the Spring '21 release, getting started with the Entitlement feature is now easier than ever! Customizable prebuilt entitlements come with your Service Cloud license, letting agents skip the tricky setup process and harness the feature's power straight out of the gate.

Enhance Your Workflow with Tab Switching in the Macro Builder

Transform complex flexipages with multiple tabs into powerful productivity tools. An update to the Macro Builder lets you create Macros across tabs without switching back and forth from the Lightning App builder.

Email-To-Case Update Enforcement Extended to Winter '22 Release

A new enforcement deadline for the Winter '21 Email-To-Case updates gives admins until the Winter '22 release to adopt the changes through the Release Update feature.

BCC Hidden from Salesforce Experience Users

Recent security enhancements for cases restrict BccAddress information for Experience users, unless they have at least read permission or they sent the original email. The field no longer appears in their email feed, and the field always shows a blank value in the Email Message compact layout and home page.

Customize Your Default No-Reply Address for Email Notifications

Before the Spring '21 update, certain email notifications automatically send from noreply@salesforce.com when **Send Case Notifications from System Address** is on. Now, you can choose which email address your org uses as the default FROM address for certain Case related notifications.

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

How: Configure and verify a default No-Reply address for your org from the **Organization-Wide Addresses** page in Setup. Then, click **Enable Test Run** in the Release Update to make email notifications send from your selected email address for Case Comment, Case Escalation, Case Assignment, and when an existing case receives emails. Finally, turn on **Send Case Notifications from System Address** from the **Support Settings** setup page.

SEE ALSO:

Set Up a Default No-Reply Address for Case-Related Email Notifications (can be outdated or unavailable during release preview)

Keep Profiles Safe from Prying Eyes with Profile Filtering for Interaction Layout Assignment

Admins now have more control over agent permissions and how they assign exceptions. When it's turned on, Profile Filtering restricts users from viewing any profiles via Interaction Layout Assignment other than their own.

Where: This change applies to Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

SEE ALSO:

    Salesforce Help: Limit Profile Details to Required Users (can be outdated or unavailable during release preview)

    Salesforce Help: Assign Interaction Logs in Salesforce Classic (can be outdated or unavailable during release preview)

Integrate with Entitlements to Supercharge Your Org

With the Spring '21 release, getting started with the Entitlement feature is now easier than ever! Customizable prebuilt entitlements come with your Service Cloud license, letting agents skip the tricky setup process and harness the feature's power straight out of the gate.

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

How: All new orgs with a Service Cloud license have automatic access to a configured prebuilt Entitlement. Existing orgs that purchased a Service Cloud License prior to the Spring '21 release can access the prebuilt Entitlement by selecting **Turn on Your Service App** in the Service Setup Assistant.

Enhance Your Workflow with Tab Switching in the Macro Builder

Transform complex flexipages with multiple tabs into powerful productivity tools. An update to the Macro Builder lets you create Macros across tabs without switching back and forth from the Lightning App builder.

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

How: Create a macro, then click **Edit Instructions** to go to the Macro Builder. Accordions and tabs with a dotted border are now clickable. Open a tab or accordion that has Quick Actions (for example, Chatter feed), choose one, and add your instructions. Then, click **Save**.

When you click one of the Quick Actions in the Instructions panel, Macro Builder automatically opens the corresponding Quick Action.

Email-To-Case Update Enforcement Extended to Winter '22 Release

A new enforcement deadline for the Winter '21 Email-To-Case updates gives admins until the Winter '22 release to adopt the changes through the Release Update feature.

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

BCC Hidden from Salesforce Experience Users

Recent security enhancements for cases restrict BccAddress information for Experience users, unless they have at least read permission or they sent the original email. The field no longer appears in their email feed, and the field always shows a blank value in the Email Message compact layout and home page.

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

How: Internal Salesforce users can still see BCC contents. For community users, the details page always shows a blank value for the BCC field. Community users see the contents of the email's BCC only if they're the original email sender.

Other Changes in Service Cloud

Keep your org more secure with profile filtering for CTI users. If you use the CPQ Large-Scale Amendment and Renewal Service, quotes now include only CPQ-managed assets.

IN THIS SECTION:

Shield User Profile Information from Prying Eyes in CTI

The Call Centers Details page shows only the number of Call Center users to comply with the Salesforce security practice of limiting the visibility of user profiles. If profile filtering is enabled, only admin users can view the user profiles of other users. Other users can see the number of users, but not the profiles. Previously, the Call Centers Details listed users' profiles.

See Only Relevant Subscription Products in Amendment and Renewal Quotes

If you use the Large-Scale Amendment and Renewal Service, amendment and renewal quotes created as of Spring '21 include only assets factored into price calculations instead of all entitlement-related assets. You can also apply this CPQ-managed asset filter to service contracts created before Spring '21 by changing the value of the new Subscription Pricing field on the line items in those contracts.

Shield User Profile Information from Prying Eyes in CTI

The Call Centers Details page shows only the number of Call Center users to comply with the Salesforce security practice of limiting the visibility of user profiles. If profile filtering is enabled, only admin users can view the user profiles of other users. Other users can see the number of users, but not the profiles. Previously, the Call Centers Details listed users' profiles.

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

Why: Keep your org as secure as possible by limiting who can see which users have access to the system.

How: To enable profile filtering, from Setup, in the Quick Find box, enter `User`, and then select **User Management Settings** and click **Profile Filtering**.

To view Call Center users, go to the Call Centers Detail page. From Setup, enter `Call Centers` in the Quick Find box, then select **Call Centers**. Select a call center. In the Call Centers Detail page, scroll down to see the Call Center Users section. If profile filtering is turned on, standard users see the number of Call Center users (1) and admin users see the number of users for each profile (2).
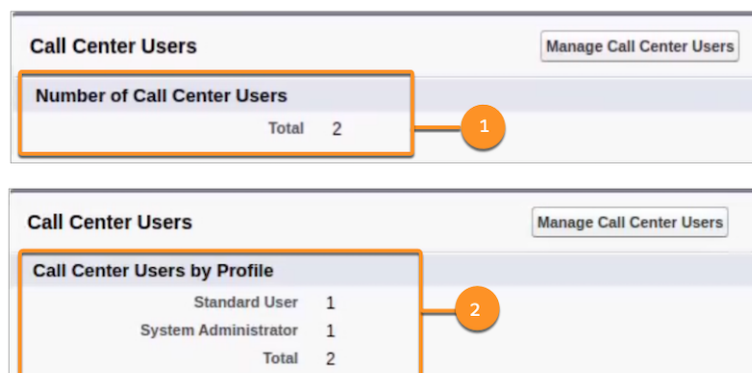
See Only Relevant Subscription Products in Amendment and Renewal Quotes

If you use the Large-Scale Amendment and Renewal Service, amendment and renewal quotes created as of Spring '21 include only assets factored into price calculations instead of all entitlement-related assets. You can also apply this CPQ-managed asset filter to service contracts created before Spring '21 by changing the value of the new Subscription Pricing field on the line items in those contracts.

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

How: If you want to apply the CPQ-managed asset filter to service contracts created before Spring '21, regardless of the service you use, set the Subscription Pricing field on the asset's contract line items to Fixed Price. When Subscription Pricing is set to null or Percent Of Total, the filter isn't applied, and related amendment and renewal quotes include all entitlement-related assets.

Sales

Salesforce Meetings helps sales teams prepare for meetings and engage attendees. High Velocity Sales users can use Einstein Conversation Insights with video calls, track the opportunities and revenue that result from sales cadences, and retire sales cadences without losing the data. Adjust forecasts on the go with the Salesforce mobile app. Track when emails are temporarily undeliverable, and test and share email templates.

IN THIS SECTION:

Salesforce Meetings

Enhance your sales reps' interactions with prospects and customers with tools that help them prepare for meetings and engage attendees like never before. The Meeting Digest unifies information about who's in a meeting, shows relevant activities, and helps reps ensure that team members are aligned going into a meeting. The Meeting Studio has a unique camera and presentation view to keep attendees engaged during virtual meetings.

High Velocity Sales

Sales teams can now use Einstein Conversation Insights with video calls, create call collections, and see more information on Conversation Insights dashboards. Managers and reps can use sales cadences with opportunities, deactivate sales cadences, and be more specific about who can change target assignees.

Sales Cloud Einstein

Einstein Opportunity Scoring uses global models when there isn't enough opportunity data. Einstein Lead Scoring stores fields more intuitively.

Core Sales Features

Get mobile forecast adjustments, more flexibility to track information on opportunity products, and more options for lead conversion. Package providers get more options for configuring order save behavior, and original territory management is scheduled for retirement.

Productivity Features

Updates for emails and email templates amp up sales rep productivity. Sales reps can follow up with a customer if an email was soft bounced, not just hard bounced. And reps can schedule an email when the email is a threaded back-and-forth discussion. Reps can have Zoom meeting links automatically added to meetings scheduled using the Insert Availability feature. Add Lightning email templates, including Email Template Builder templates, to managed packages and change sets. Also use them in Salesforce automations such as email alerts. In Email Template Builder, duplicate existing components instead of starting from scratch.

Integration with Google

Legacy versions of the Inbox Chrome extension, which includes Inbox features such as Email Tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Gmail integration with Inbox. Reps can add Zoom links to meetings generated using the Insert Availability feature in the Gmail integration with Inbox. We're no longer introducing enhancements for Lightning Sync, but see what's new with our next-generation sync product, Einstein Activity Capture.

Legacy versions of the Inbox Outlook add-in, which includes Inbox features such as Email Tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Outlook integration with Inbox. Reps can add Zoom links to meetings generated using the Insert Availability feature in the Outlook integration with Inbox. If you're a Lightning Sync user on Microsoft Office 365, make sure you're ready for Microsoft retirement of Basic Authentication in 2021. If you're still using Salesforce for Outlook, learn about how product retirement affects your users between 2021 and 2023.

Salesforce Meetings

Enhance your sales reps' interactions with prospects and customers with tools that help them prepare for meetings and engage attendees like never before. The Meeting Digest unifies information about who's in a meeting, shows relevant activities, and helps reps ensure that team members are aligned going into a meeting. The Meeting Studio has a unique camera and presentation view to keep attendees engaged during virtual meetings.

IN THIS SECTION:

Prepare for Productive Conversations with the Meeting Digest

A well-organized meeting, the right agenda, and a prepared sales team leave the best impression. The Meeting Digest, part of Salesforce Meetings, gives your sales reps a single page that they can use to gather and share information before a meeting starts. They get insights about who's attending a meeting, reminders about meeting invitation responses and details, plus related record activity.

Supercharge Virtual Events with Meeting Studio

Share a meeting experience like no other with Meeting Studio, keeping prospects and customers engaged during virtual events. Reps can show their camera view and presentation in the same window to save time and bypass awkward transitions when switching the content to share next. Reps can adapt their presentation approach based on visual cues from their participants. Reps see key information from the Meeting Digest that helps them lead and guide the meeting conversation. And they get a place to take notes, document next steps, and collaborate with their team.

Prepare for Productive Conversations with the Meeting Digest

A well-organized meeting, the right agenda, and a prepared sales team leave the best impression. The Meeting Digest, part of Salesforce Meetings, gives your sales reps a single page that they can use to gather and share information before a meeting starts. They get insights about who's attending a meeting, reminders about meeting invitation responses and details, plus related record activity.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

When: This feature is available in production shortly after all instances are upgraded to the Spring '21 release. To see the feature in sandboxes, run Match Production License or request a refresh after the feature is available in production.

Who: Only users who are assigned the Salesforce Meetings permission set can see the Meeting Digest tab.

How: From Setup, in the Quick Find box, enter `Meetings`, and then select **Settings**. Verify and indicate that you have a syncing solution enabled, such as Einstein Activity Capture or Lightning Sync. Then turn on Salesforce Meetings and assign the Salesforce Meetings permission set to the users who you want to have access to the Meeting Digest tab.

> Note: If you have custom page layouts defined for the event record, use Lightning App Builder to add the Meeting Digest component to the page layout. For the best experience, we recommend adding the component to its own tab within the layout or to a wide area within the page.

When enabled, users see the Meeting Digest tab when viewing an event record.

Reps can review who's responded to the meeting invite and gather information about who they are (1). If Einstein Activity Capture event syncing is enabled, reps receive visual cues about meeting attendee job titles and roles. With Einstein Activity Capture, they also receive reminders about the event, such as insight into attendees who haven't responded and missing event details (2). Reps can review the related record's activity in the activity timeline (3). This activity timeline shows only the activity associated with the record that's important for the meeting. If Salesforce Anywhere (Quip) is enabled, reps can use the Associated Documents component to take notes and review related documents in Quip.

SEE ALSO:

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

Salesforce Help: Quip Associated Documents Component (can be outdated or unavailable during release preview)

Supercharge Virtual Events with Meeting Studio

Share a meeting experience like no other with Meeting Studio, keeping prospects and customers engaged during virtual events. Reps can show their camera view and presentation in the same window to save time and bypass awkward transitions when switching the content to share next. Reps can adapt their presentation approach based on visual cues from their participants. Reps see key information from the Meeting Digest that helps them lead and guide the meeting conversation. And they get a place to take notes, document next steps, and collaborate with their team.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

When: This feature is available in production shortly after all instances are upgraded to the Spring '21 release. To see the feature in sandboxes, run Match Production License or request a refresh after the feature is available in production.

Who: Only users who are assigned the Salesforce Meetings permission set can use Meeting Studio.

Why: Sales reps are holding more virtual meetings with prospects and customers than ever before. Meeting Studio isn't a replacement for web conferencing applications such as Zoom, Google Meet, or Cisco Webex. Instead, Meeting Studio is a way to provide a unique experience within your existing video conferencing applications and give sales reps an easier presenter experience.

How: From Setup, in the Quick Find box, enter `Meetings`, and then select **Settings**. Verify and indicate that you have a syncing solution enabled, such as Einstein Activity Capture or Lightning Sync. Then turn on Salesforce Meetings and assign the Salesforce Meetings permission set to the users who you want to have access to Meeting Studio.

Reps launch Meeting Studio directly from the Meeting Digest tab on an event record. If an associated meeting link such as Zoom or Google Meet is available for the meeting, Meeting Studio and the meeting open in separate browser tabs.

💡 Tip: To give your team access to Meeting Studio for meetings that don't have an event record, add the Meeting Studio component to a user's Home page.
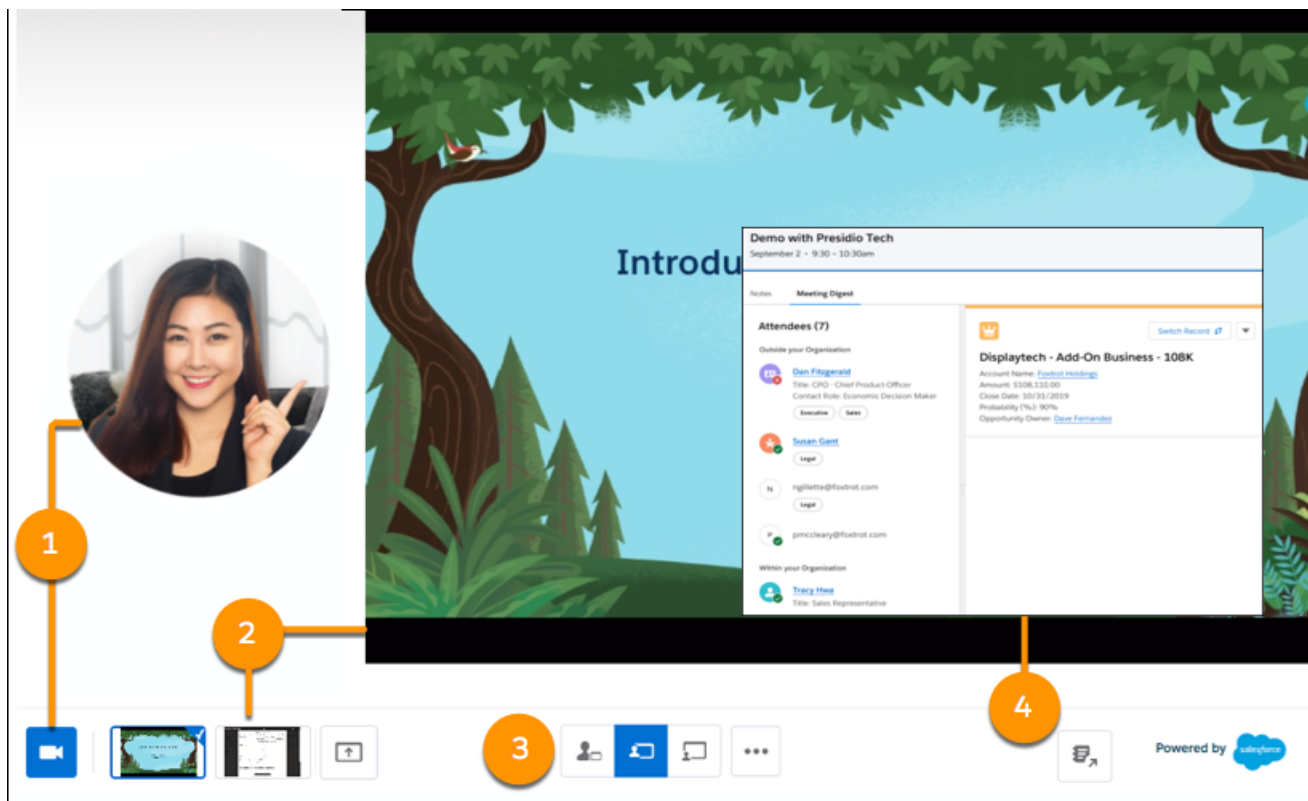
In the video conference application, reps share the Meeting Studio tab instead of turning on their camera in the application and bouncing between shared tabs and windows. The audience sees a rep's camera view (1) and the content that they present (2). During the meeting,

reps can switch content without stopping and resharing a different window or browser tab. To direct audience attention, reps can change views to make their camera or their content the focus during a meeting (3). If reps launch Meeting Studio directly from the Meeting Digest, they also have access to meeting information from the Meeting Digest (4). The Presenter's Panel includes a place to take notes to ensure that everyone is aligned before, during, and after the meeting.

SEE ALSO:

    Salesforce Video: Welcome to Meeting Studio (English Only) (can be outdated or unavailable during release preview)

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

    Salesforce Help: Lightning App Builder (can be outdated or unavailable during release preview)

High Velocity Sales

Sales teams can now use Einstein Conversation Insights with video calls, create call collections, and see more information on Conversation Insights dashboards. Managers and reps can use sales cadences with opportunities, deactivate sales cadences, and be more specific about who can change target assignees.

High Velocity Sales and its features are available for an extra cost. For pricing details, contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

IN THIS SECTION:

Einstein Conversation Insights

Call Coaching has a new name and now supports video calls. Users can easily create and share groups of voice calls with call collections. And sales managers can access video call data in Conversation Insights dashboards.

Use Sales Cadences to Advance Opportunities and Track Target Engagements

Let your sales team use the efficiency of sales cadences to advance opportunities. Sales managers can create opportunity nurturing sales cadences. Sales managers and reps can see targets' sales cadence status and recent engagement activity on opportunities and on target record pages when you add the Sales Engagements component.

Retire Sales Cadences Without Losing Their Data

Your sales managers can now retire sales cadences they no longer use. By deactivating a sales cadence, they prevent new targets from being added without deleting the sales cadence or its historical data. Existing targets in a deactivated sales cadence continue until completion.

Specify Who Can Change Target Assignees

Help your sales teams manage prospects. The new Limit Who Can Change Target Assignees setting lets you choose which team members can update target assignees when Change Target Assignees is on. Sales managers can choose to allow only other managers or specific users to update assignees.

Get More Details About Sales Cadence Performance

The Action Cadence Step Monthly Metrics object lets sales managers easily see month-to-month target engagement statistics for sales cadence steps, email templates, and call scripts. Sales cadence target dispositions are now available in reports. Einstein Analytics High Velocity Sales Performance dashboards now include email link click and reply statistics.

Einstein Conversation Insights

Call Coaching has a new name and now supports video calls. Users can easily create and share groups of voice calls with call collections. And sales managers can access video call data in Conversation Insights dashboards.

Einstein Conversation Insights does not record your calls. You connect it with your recording system such as Sales Dialer or other supported partners. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

IN THIS SECTION:

Einstein Call Coaching Is Now Einstein Conversation Insights

A coaching solution by any other name could help sell just as well. Sweet.

Use Conversation Insights with Video Calls

Get the same insights and coachable moments for your video calls that you already get for phone calls. Conversation Insights users can access video support after Zoom is integrated.

Create and Share Call Collections

Organize your calls in categories such as effective initial calls or how to handle pricing questions. Make calls more available to access and review. Managers and reps can easily create and access groups of useful voice calls.

Access Video Call Data in Conversation Insights Dashboards

Want to see data for all your video calls? We've got you covered. Sales managers can now filter Conversation Insights dashboards by the conversation type.

Einstein Call Coaching Is Now Einstein Conversation Insights

A coaching solution by any other name could help sell just as well. Sweet.

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.

Use Conversation Insights with Video Calls

Get the same insights and coachable moments for your video calls that you already get for phone calls. Conversation Insights users can access video support after Zoom is integrated.

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.

When: This feature is available later in the Spring '21 release.

Who: This feature is available to High Velocity Sales users with access to Einstein Conversation Insights.

Why: Use several useful Conversation Insights features with video calls. Access recorded meetings directly in Salesforce and see insights and trends surfaced from calls. Gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps.
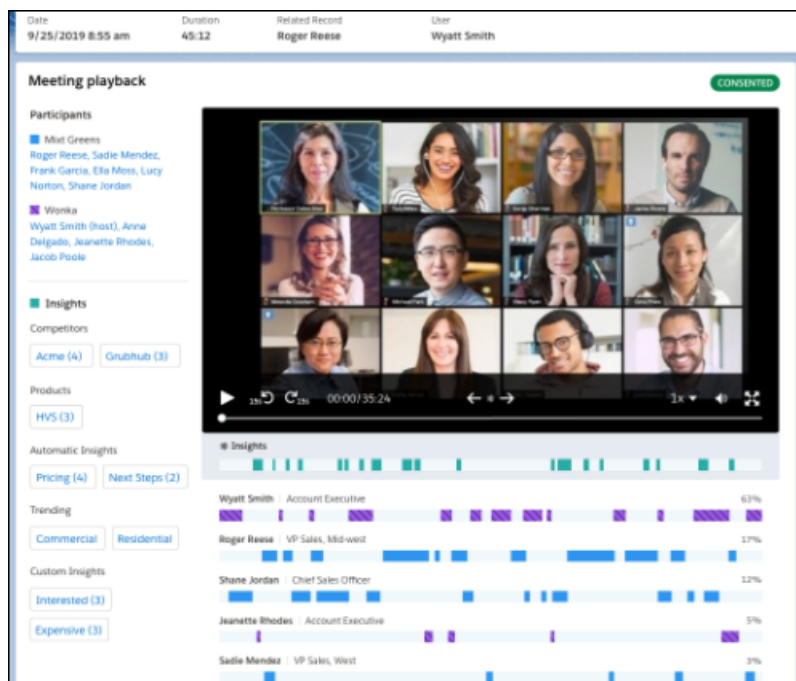
From the video call record, Conversation Insights users can play recordings and see call details. Click different mentions to highlight and jump to specific areas of the call.

Managers can also see video call data from the Conversation Insights dashboards and see video calls surfaced in the Call Highlights emails.

Not all voice call features are supported, such as record sharing, call collections, or Chatter access.

How: To access video support, add Zoom Video as a recording provider from General Settings in Setup.
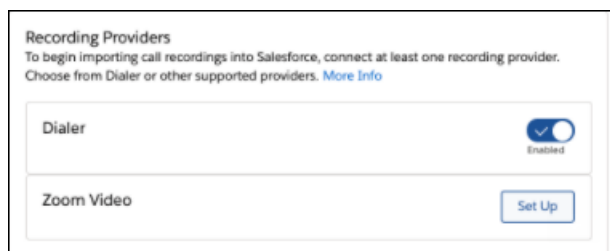
Create and Share Call Collections

Organize your calls in categories such as effective initial calls or how to handle pricing questions. Make calls more available to access and review. Managers and reps can easily create and access groups of useful voice 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 High Velocity Sales users with access to Einstein Conversation Insights.

Why: Sales managers can now create and share collections of calls, allowing users to access banks of useful calls organized by category.

Users receive a notification when collections are shared with them.

Managers or reps can create collections. Collections are private by default, but sales managers have access to their reps' collections through role hierarchy.

Standard users have access to view collections by default, but the collections must be shared with them in order to view the items in collection. The owner of a collection can share it with individual users or public groups.

How: Access call collections from the Conversation Insights dashboard menu. You can also search for Record Collections in the App Launcher or surface a link to the records in the Navigation Menu.
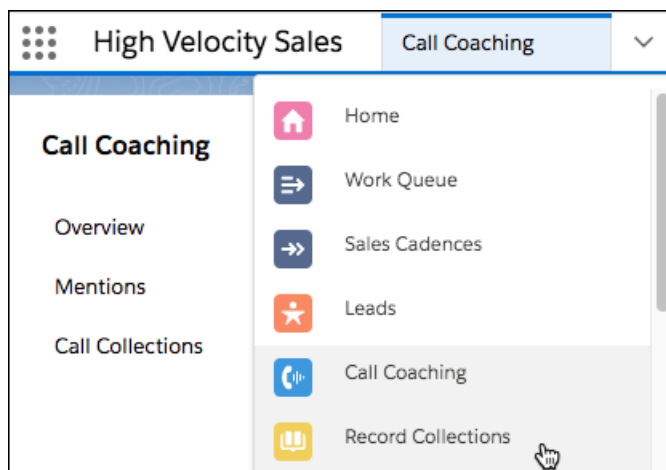
Reps can add call records that they own, and managers can add calls they have access to. To add a voice call to a collection, click Add to Collection from the voice call record. Managers and reps can also create a collection directly from the Add to Collection modal.
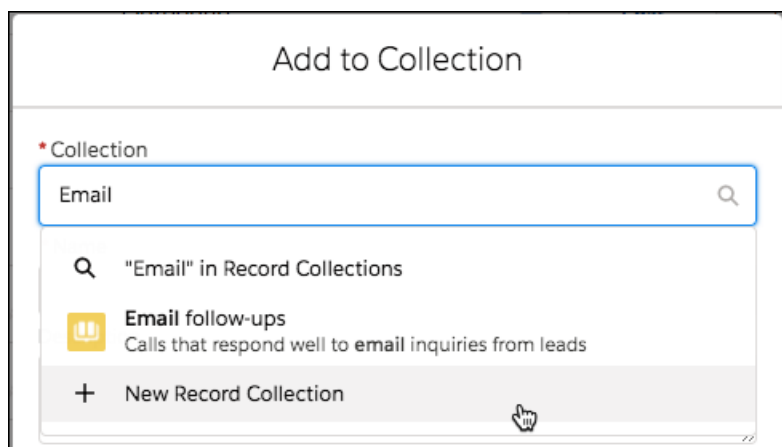
Each call collection is limited to 100 items and 100 members.

Access Video Call Data in Conversation Insights Dashboards

Want to see data for all your video calls? We've got you covered. Sales managers can now filter Conversation Insights dashboards by the conversation type.

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.

How: From the Overview and Mentions pages, sales managers can now filter by conversation type for Wave dashboards.

Use Sales Cadences to Advance Opportunities and Track Target Engagements

Let your sales team use the efficiency of sales cadences to advance opportunities. Sales managers can create opportunity nurturing sales cadences. Sales managers and reps can see targets' sales cadence status and recent engagement activity on opportunities and on target record pages when you add the Sales Engagements component.

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

Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permissions.

Why: Now when managers or reps add targets to a sales cadence, they can relate opportunities to the targets.

Opportunities associated with contact and person account targets appear in the Work Queue with the target. Clicking an item opens both the target and the opportunity.
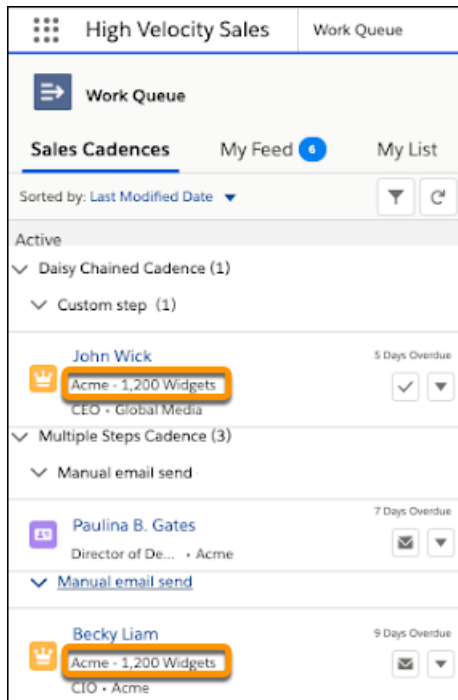
On opportunities, the Sales Engagements component shows engagement activity for each opportunity contact role. Engagement information is available for contacts whether they are in a sales cadence (1) or not (2). You can add the component in a wide or narrow orientation.
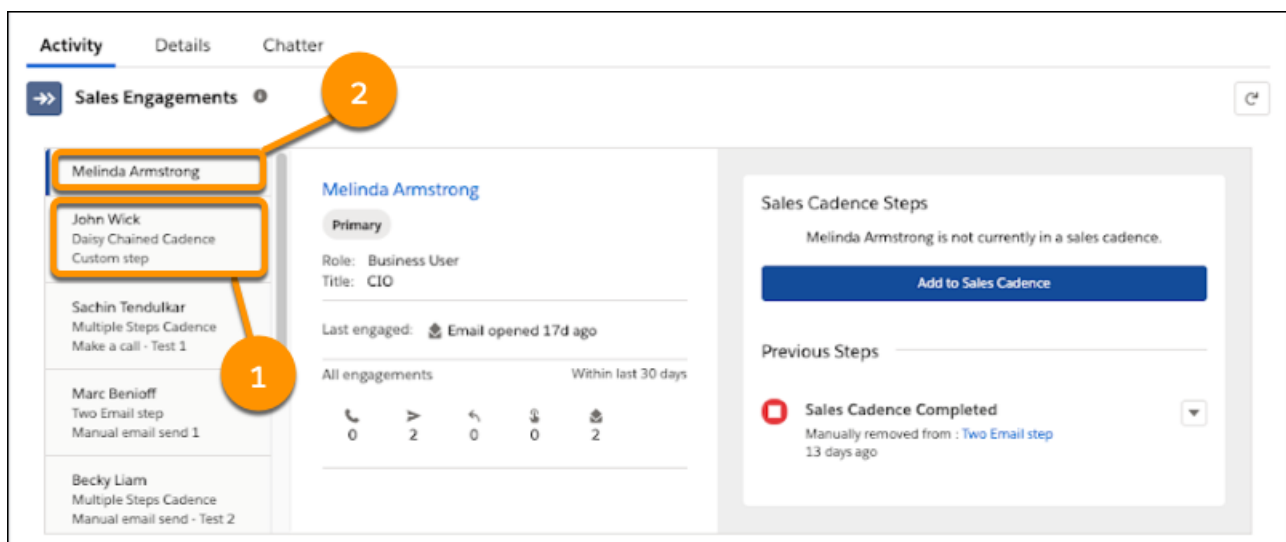
The Sales Engagements component is also available on lead, contact, and person account records. The component includes the target's sales cadence step progress, so it replaces the existing Sales Cadence Steps component in page layouts.

Managers and reps can update the related opportunity and a target's disposition during or after completing the sales cadence.
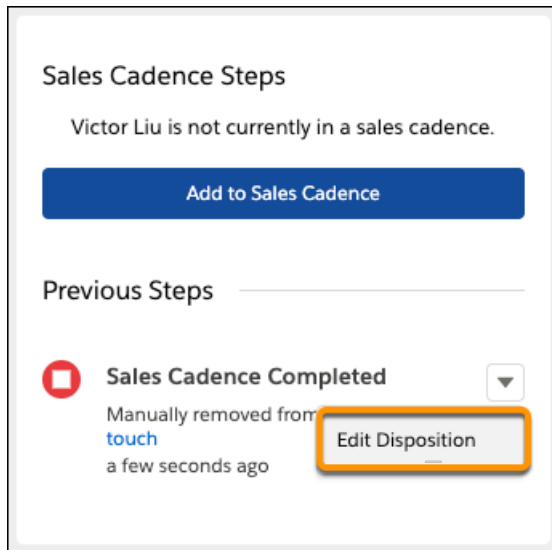
Target disposition (1) indicates the outcome of the sales cadence for the target. The disposition can be set by the user upon manual removal or automatically when the target completes or exits via exit criteria. The Attribution Event (2) specifies whether to attribute the opportunity to the sales cadence when the opportunity is created or upon opportunity stage advancement.

How: In Setup, turn on Relate Opportunities to Sales Cadences.
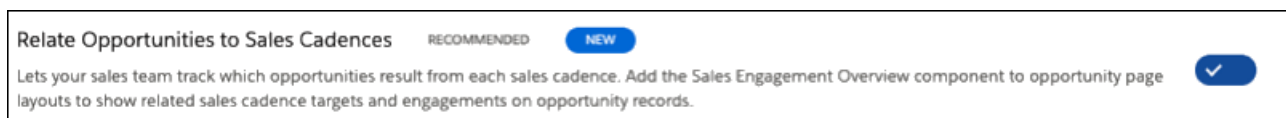
Then add the Sales Engagements component to opportunity, lead, contact, and person account page layouts.

Retire Sales Cadences Without Losing Their Data

Your sales managers can now retire sales cadences they no longer use. By deactivating a sales cadence, they prevent new targets from being added without deleting the sales cadence or its historical data. Existing targets in a deactivated sales cadence continue until completion.

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

Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permissions.

Why: To update their sales outreach patterns, sales managers replace older sales cadences with new ones. Deactivating a sales cadence prevents further use, preserves sales cadence data, and avoids confusion with newer sales cadences.

How: The Deactivate action is available on sales cadence record pages.

Specify Who Can Change Target Assignees

Help your sales teams manage prospects. The new Limit Who Can Change Target Assignees setting lets you choose which team members can update target assignees when Change Target Assignees is on. Sales managers can choose to allow only other managers or specific users to update assignees.

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

How: From Setup, turn on Limit Who Can Change Target Assignees (1), and assign Change Sales Cadence Target Assignees permissions to individual users or groups.
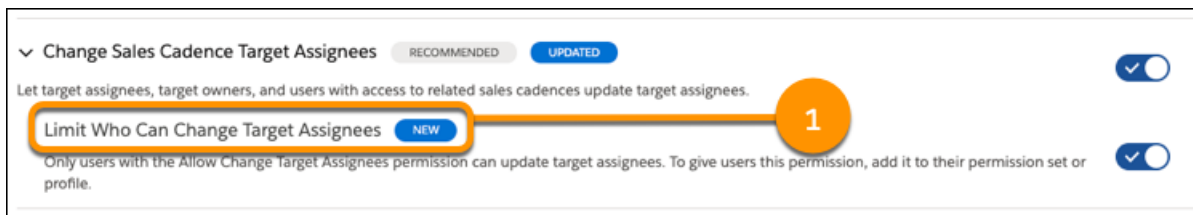
Get More Details About Sales Cadence Performance

The Action Cadence Step Monthly Metrics object lets sales managers easily see month-to-month target engagement statistics for sales cadence steps, email templates, and call scripts. Sales cadence target dispositions are now available in reports. Einstein Analytics High Velocity Sales Performance dashboards now include email link click and reply statistics.

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

Why: The new Action Cadence Step Monthly Metrics object groups performance data by month so managers can more easily identify seasonal performance trends. Custom report types for email templates, call scripts, and sales cadence steps support joining with these objects, so managers can see monthly totals for email opens, calls made, steps completed, and more.
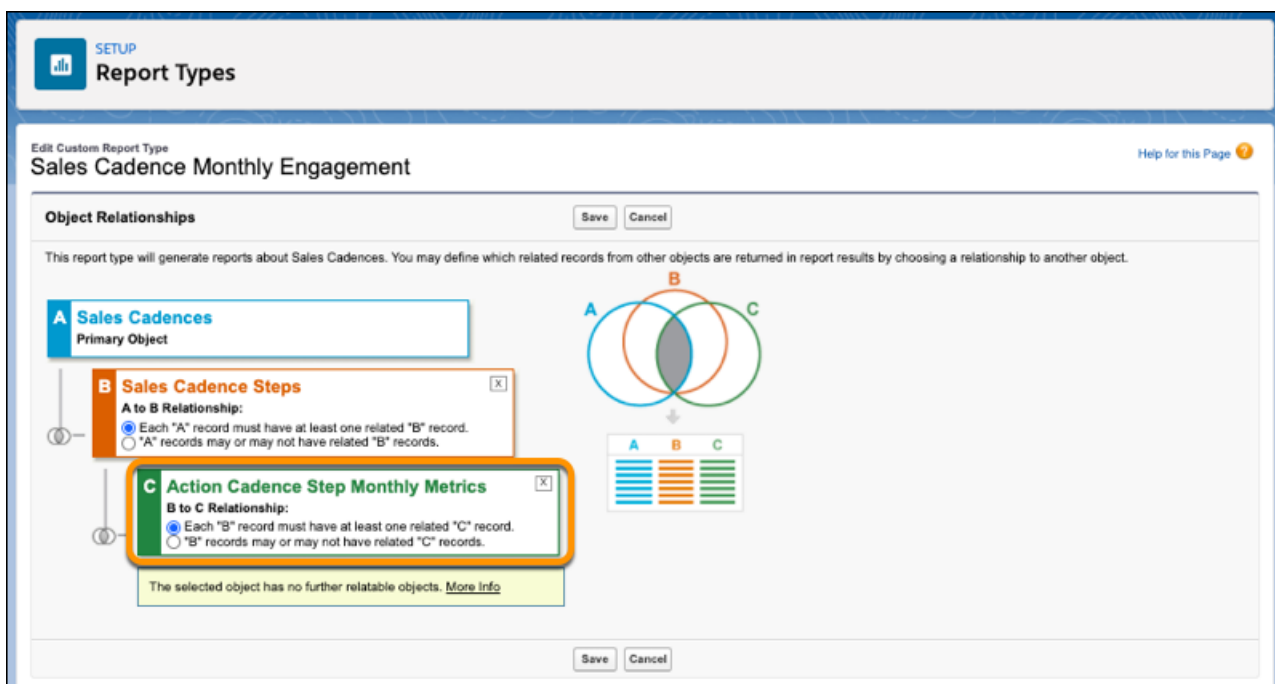
When reviewing cadence tracker performance, managers can also see sales cadence target disposition information.

You can use lookup relationships to add opportunity fields such as Opportunity Name, Stage, Amount, and more to custom report types for sales cadence trackers with contacts, leads, and accounts.

The Sales Cadence Steps related list on sales cadence records now shows all sales cadence step types with their completion statistics.

Sales Cloud Einstein

Einstein Opportunity Scoring uses global models when there isn't enough opportunity data. Einstein Lead Scoring stores fields more intuitively.

IN THIS SECTION:

Enable Einstein Opportunity Scoring with Less Data

Even if you have a smaller data set, you can now enable Einstein Opportunity Scoring. Einstein takes advantage of a global scoring model that uses anonymous aggregated data to allow everyone to score their opportunities. When you have enough of your own data, Einstein switches to a scoring model built only with that data.

Store Included Fields Instead of Excluded Fields in Einstein Lead Scoring

Previously, Einstein Lead Scoring stored the list of lead fields to exclude from the scoring model. If you add new custom lead fields after turning on Einstein Lead Scoring, add the fields to the list used by the scoring model in Setup.

Enable Einstein Opportunity Scoring with Less Data

Even if you have a smaller data set, you can now enable Einstein Opportunity Scoring. Einstein takes advantage of a global scoring model that uses anonymous aggregated data to allow everyone to score their opportunities. When you have enough of your 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.

When: Global models for Einstein Opportunity Scoring are available later in the Spring '21 release.

Why: Einstein intelligence is built on data. But small companies or those new to Salesforce or to a particular Salesforce object aren't likely to meet the data requirements for Einstein Opportunity Scoring. With global models, everyone can get opportunity scores.

How: To see whether you're ready to use a global model or a single-customer model, run the Einstein Readiness Assessor from Setup.

SEE ALSO:

Salesforce Help: Run the Sales Cloud Einstein Readiness Assessor (can be outdated or unavailable during release preview)

Salesforce Einstein

Store Included Fields Instead of Excluded Fields in Einstein Lead Scoring

Previously, Einstein Lead Scoring stored the list of lead fields to exclude from the scoring model. If you add new custom lead fields after turning on Einstein Lead Scoring, add the fields to the list used by the scoring model in Setup.

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

SEE ALSO:

Salesforce Einstein

Core Sales Features

Get mobile forecast adjustments, more flexibility to track information on opportunity products, and more options for lead conversion. Package providers get more options for configuring order save behavior, and original territory management is scheduled for retirement.

IN THIS SECTION:

Collaborative Forecasts

Mobile forecasting now supports adjustments.

Opportunities

Sales teams get more flexibility for tracking information on opportunity product records.

Leads

Sales reps get more flexibility when converting leads.

Campaigns

Try the new Account as Campaign Members (Beta) to support your account-based marketing efforts.

Orders

Package providers can configure which type of order save behavior their 2GP and unlocked packages support.

Other Changes in Core Sales Features

The original territory management feature is scheduled for retirement in Summer '21.

Collaborative Forecasts

Mobile forecasting now supports adjustments.

IN THIS SECTION:

Adjust Your Forecasts on the Go

The Salesforce mobile app now supports forecast adjustments. In the mobile app, you can adjust your own forecasts but not your subordinates' forecasts. Previously, all mobile forecasts were read-only.

Adjust Your Forecasts on the Go

The Salesforce mobile app now supports forecast adjustments. In the mobile app, you can adjust your own forecasts but not your subordinates' forecasts. Previously, all mobile forecasts were read-only.

Where: This change applies to all versions of the Salesforce mobile app in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: On the Forecasts touchscreen, tap **Adjust** to get started. You can also tap the forecast that you want to adjust, and then tap **Adjust**. Enter the adjustment, add an optional note, and then save your changes.
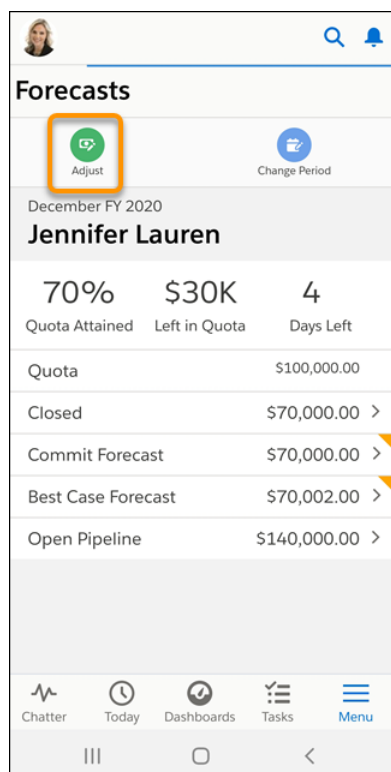
SEE ALSO:

Salesforce Help: Adjust Forecasts in Collaborative Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Collaborative Forecasts: What's Different or Not Available in the Salesforce Mobile App (can be outdated or unavailable during release preview)

Opportunities

Sales teams get more flexibility for tracking information on opportunity product records.

IN THIS SECTION:

Do More with Opportunity Products

Give your sales team more flexibility to track information on opportunity product records. For example, a rep wants to track two delivery locations in a related list for an opportunity product record. Now you can create an object relationship and page layout to make it happen.

Do More with Opportunity Products

Give your sales team more flexibility to track information on opportunity product records. For example, a rep wants to track two delivery locations in a related list for an opportunity product record. Now you can create an object relationship and page layout to make it happen.

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

How: In your object management settings, create a lookup relationship between any standard or custom object and Opportunity Product (the OpportunityLineItem object). Make sure that the lookup field and related list are added to the page layouts where you want them to appear.

In this example, the Location custom object has a lookup relationship with Opportunity Product.

Now reps can track the North Beach and Downtown delivery locations on the Monitor product record.

Enterprise API supports lookup relationships between standard and custom objects and the OpportunityLineItem object.

> 📝 **Note:** Sound familiar? This feature was briefly available in Winter '21, but we removed it after it suffered from a case of stage fright. After more preparation, it's now ready for the spotlight!

Leads

Sales reps get more flexibility when converting leads.

IN THIS SECTION:

[Convert Leads to a Person Account and a Business Account at the Same Time with the API](#)

If your customers include individuals and groups, your sales teams can associate converted leads with a person account and a business account simultaneously. For example, a bank can create person accounts for each member of a family and group the family into a business account. To enable these lead conversions, build a custom flow with the API.

Convert Leads to a Person Account and a Business Account at the Same Time with the API

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

How: For Salesforce orgs that use APEX Lead Convert, Person Accounts, and Contacts to Multiple Accounts, new arguments are available on the LeadConvert() class. Use the new relatedPersonAccountId argument to convert the lead to an existing person account instead of a contact. Use the relatedPersonAccountRecord argument to convert the lead to a new person account instead of a contact.

The LeadConvert class includes new methods for setting and inspecting the related person account. The LeadConvertResult class has a new method and property.

To see related person accounts on business account record pages, add the Related Contacts related list to Account page layouts.
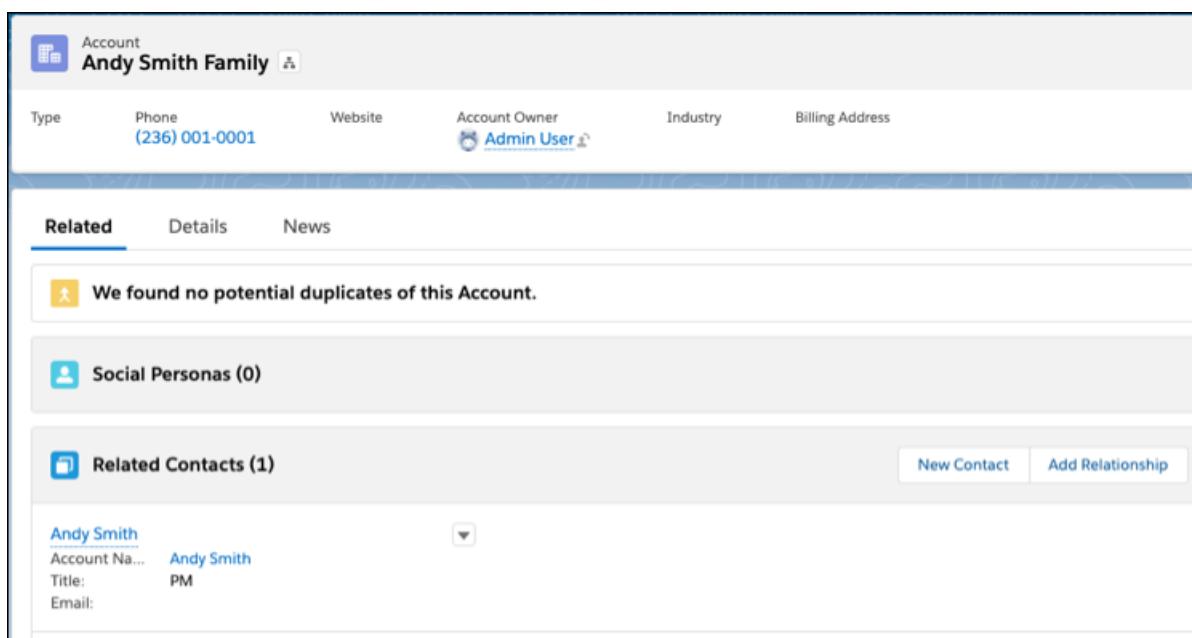
Campaigns

Try the new Account as Campaign Members (Beta) to support your account-based marketing efforts.

IN THIS SECTION:

[Track Accounts as Campaign Members (Beta)](#)

You can now add account records as members of a campaign. Focus your attention on important accounts in the tables, related lists, and reports that contain campaign members.

The Lead/Contact ID label is now Related Record ID. The label change appears by default on the Campaigns and Campaign Members standard report.

Track Accounts as Campaign Members (Beta)

You can now add account records as members of a campaign. Focus your attention on important accounts in the tables, related lists, and reports that contain campaign members.

Where: This change applies to all Salesforce and Pardot editions using the Salesforce-Pardot connector.

> **Note:** As a beta feature, Accounts as Campaign Members 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 Accounts as Campaign Members in the Trailblazer Community.

Why: When the Accounts as Campaign Members setting is turned on, accounts become available to add or analyze in these locations.

Record	Location	What's Shown
Account	Campaigns related list	Shows campaigns associated with any of the account's contacts
Account	Campaign History related list	Shows campaigns that include the account as a campaign member. Use **Add to Campaign** to create a relationship.
Campaign	Campaign Members related list	Shows accounts that are campaign members. Use **Add Account** to create a relationship.
Standard Report	Campaigns and Campaign Members report	Shows account records with a member type of Account. The column formerly called Lead/Contact ID is now labeled Related Record ID.
Standard Report	Campaigns with Accounts report	This new report type shows relationships between campaigns and accounts.
Custom Reports	Object Types	When you select Campaign as the primary object, Account now appears as a secondary object.

> **Note:** Sharing Settings that use Controlled by Lead/Contact haven't changed. During the beta, accounts that are added as campaign members aren't evaluated by the sharing settings, and are public.

How: Turn on the Accounts as Campaign Members setting in Salesforce Setup. Updated and new reports become available. To see campaigns on your account records, add the Campaign History and Campaigns related lists to your account page layout.

Lead/Contact ID Label Was Changed

The Lead/Contact ID label is now Related Record ID. The label change appears by default on the Campaigns and Campaign Members standard report.

Where: This change applies to all Salesforce editions.

Why: The label was changed to support the Accounts as Campaign Members beta feature, but appears for all users. The field can now support account, lead, and contact IDs. To include account IDs in this field, opt in to the beta feature in Salesforce Setup.

Orders

Package providers can configure which type of order save behavior their 2GP and unlocked packages support.

IN THIS SECTION:

[Configure Order Save Behavior in 2GP and Unlocked Packages](#)
Allow 2GP package providers to determine which type of order save behavior their package supports. You can now configure New Order Save Behavior in 2GP and unlocked packages. Previously, only 1GP packages supported the new order save behavior introduced with the Winter '21 New Order Save Behavior release update.

Configure Order Save Behavior in 2GP and Unlocked Packages

Allow 2GP package providers to determine which type of order save behavior their package supports. You can now configure New Order Save Behavior in 2GP and unlocked packages. Previously, only 1GP packages supported the new order save behavior introduced with the Winter '21 New Order Save Behavior release update.

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

Why: Previously, you could test only the order save behavior of an unlocked or 2GP package in a scratch org. Now you can define order save behavior in the `features` attribute within the scratch org definition file of a 2GP or unlocked package. You have three options within `features`.

- **OrderSaveLogicEnabled**: Enables scratch org support for New Order Save Behavior. This value supports New Order Save Behavior only. If your scratch org needs both Old and New Order Save Behavior, use OrderSaveBehaviorBoth.

- **OrderSaveBehaviorBoth**: Enables scratch org support for both New Order Save Behavior and Old Order Save Behavior.

- **Null**: If you don't add OrderSaveLogicEnabled or OrderSaveBehaviorBoth to your definitions file, your package supports Old Order Save Behavior only.

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

The original territory management feature is scheduled for retirement in Summer '21.

IN THIS SECTION:

[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.

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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

Updates for emails and email templates amp up sales rep productivity. Sales reps can follow up with a customer if an email was soft bounced, not just hard bounced. And reps can schedule an email when the email is a threaded back-and-forth discussion. Reps can have Zoom meeting links automatically added to meetings scheduled using the Insert Availability feature. Add Lightning email templates, including Email Template Builder templates, to managed packages and change sets. Also use them in Salesforce automations such as email alerts. In Email Template Builder, duplicate existing components instead of starting from scratch.

IN THIS SECTION:

[Email Experience](#)

Your sales reps can now tell if an email was soft bounced, not just hard bounced, so they can ensure customers get the emails reps are sending. Reps can now schedule an email when the email is a threaded back-and-forth discussion. And when reps connect their Zoom accounts and create a meeting using Insert Availability, a Zoom meeting link is added when the meeting is accepted.

[Email Templates](#)

Lightning email templates, including those built using Email Template Builder, are easily shared with managed packages and change sets. Test your templates and move them to your Salesforce production org, or share them with other users via AppExchange. You can also use Lightning email templates, including those built using Email Template Builder, in Salesforce automations such as email alerts. And in Email Template Builder users can duplicate existing components to save time when creating similar components. Duplicate a component and edit the copy instead of starting from scratch.

[Einstein Activity Capture](#)

Add users to a configuration by profile. Customize field mappings for contacts and events. You can also sync internal events.

[Salesforce Inbox](#)

Check out the latest improvements to the Inbox mobile app.

[Calendar](#)

Developer admins can offer users more setup assistance through the CalendarView object in the API.

Dialer

Dialer has a new name.

Email Experience

Your sales reps can now tell if an email was soft bounced, not just hard bounced, so they can ensure customers get the emails reps are sending. Reps can now schedule an email when the email is a threaded back-and-forth discussion. And when reps connect their Zoom accounts and create a meeting using Insert Availability, a Zoom meeting link is added when the meeting is accepted.

IN THIS SECTION:

Make Sure Emails Get Delivered with Soft Bounce Email Handling

Companies use bounce handling so that their sales reps know when an email doesn't get delivered. Now you can track an email's soft bounce, which is a temporary delivery failure. Previously, you tracked only hard bounces, which are permanent delivery failures.

Monitor More Changes in the Setup Audit Trail

To help you track the recent setup changes that you and other admins make to your Salesforce.org, we added new events to the Setup Audit Trail.

Use Send Later with Threaded Emails

Reps can now schedule emails to send at the most optimal time when replying to an email, not just when composing a new email. Previously, reps could schedule only new, unthreaded emails.

Add Zoom Meeting Links to Events Created Using Insert Availability

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in Lightning Experience email. Automated Zoom meeting link additions means reps no longer add links manually after attendees select an event time.

Make Sure Emails Get Delivered with Soft Bounce Email Handling

Companies use bounce handling so that their sales reps know when an email doesn't get delivered. Now you can track an email's soft bounce, which is a temporary delivery failure. Previously, you tracked only hard bounces, which are permanent delivery failures.

Where: This update is available in Lightning Experience and all Salesforce apps in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The activity timeline shows a warning to indicate that the email has bounced.

Reps know when their email didn't reach the recipient. Sending emails to an address that generated a soft bounce sometimes succeeds another time. It's not necessary to confirm or update the recipient email address, unlike with an email address that generated a hard bounce.

SEE ALSO:

Salesforce Help: Enable Email Bounce Handling (can be outdated or unavailable during release preview)

Monitor More Changes in the Setup Audit Trail

To help you track the recent setup changes that you and other admins make to your Salesforce.org, we added new events to the Setup Audit Trail.

Where: This change applies to the Setup Audit Trail, available in Lightning Experience and Salesforce Classic in Contact Manager, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: You can now track changes to Email Relay. Track changes to email relay or record filters set through the Email Delivery Settings page.

How: To view the audit history, from Setup, enter View Setup Audit Trail in the quick find box, then select **View Setup Audit Trail**.

Use Send Later with Threaded Emails

Reps can now schedule emails to send at the most optimal time when replying to an email, not just when composing a new email. Previously, reps could schedule only new, unthreaded emails.

Where: This change applies to Lightning Experience in:

- High Velocity Sales, which is available as an add-on in Enterprise, Performance, and Unlimited editions.
- Salesforce Inbox, which is available for an extra cost in Group, Professional, Enterprise, Performance, and Unlimited editions and no cost in Essentials edition.
- Sales Cloud Einstein, which is available for an extra cost in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Schedule Emails with Send Later (can be outdated or unavailable during release preview)

Add Zoom Meeting Links to Events Created Using Insert Availability

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in Lightning Experience email. Automated Zoom meeting link additions means reps no longer add links manually after attendees select an event time.

Where: This change applies to Lightning Experience orgs with Salesforce Inbox and Enhanced Email enabled in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Add Zoom Meeting Links to Events Created with Insert Availability in the Outlook Integration with Inbox

Email Templates

Lightning email templates, including those built using Email Template Builder, are easily shared with managed packages and change sets. Test your templates and move them to your Salesforce production org, or share them with other users via AppExchange. You can also use Lightning email templates, including those built using Email Template Builder, in Salesforce automations such as email alerts. And in Email Template Builder users can duplicate existing components to save time when creating similar components. Duplicate a component and edit the copy instead of starting from scratch.

IN THIS SECTION:

[Distribute Lightning Email Templates with Packaging and Change Sets](#)

Create managed packages containing Lightning email templates using the first-generation packaging tool. Packages let users download email templates that you can control and update. Change sets let you test Lightning email templates and automations in a sandbox environment and then move what's successful to a production environment. Previously, these features were available only for Salesforce Classic email templates.

[Use Lightning Email Templates in Salesforce Automations](#)

Now use Lightning email templates—including Email Template Builder email templates—in Salesforce automations, including email alerts, Flow, Workflow, Process Builder, Approval Processes, and more. For example, you can set up an email alert that sends an email to users about something that's happened, and include a Lightning email template with the email alert. Previously, when you set up an email alert you used Salesforce Classic email templates only.

[Save Time with Duplicate Components in Email Template Builder](#)

Sales reps can now create the perfect email template component and then duplicate it to reuse it. Previously, reps recreated components.

[Optimize Email Management](#)

Now your reps can find email templates more easily with a renamed set of template choices. My Templates is now My Lightning Email Templates and All Templates is now All Lightning Templates. All Classic Templates hasn't changed.

Distribute Lightning Email Templates with Packaging and Change Sets

Create managed packages containing Lightning email templates using the first-generation packaging tool. Packages let users download email templates that you can control and update. Change sets let you test Lightning email templates and automations in a sandbox environment and then move what's successful to a production environment. Previously, these features were available only for Salesforce Classic email templates.

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

Creating a managed package is supported in Developer edition only.

This change to change sets applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Database.com editions.

Why: Packaging and change sets have several uses.

- Add Lightning email templates to a managed package and upload the package to AppExchange. You can share your email templates across the Salesforce ecosystem.

- Test your Lightning email templates, flows, and automations like email alerts in a Sandbox environment. Then add your tested files to change sets and deploy them to a production environment. Save time and avoid introducing errors by replicating the templates and automations.

- You want your Salesforce org to automatically send an email to an account owner every time the account is updated. Use a Lightning email template in an email alert that's triggered by a flow.

How: When you create a managed package, choose from Lightning and Classic email templates.

Tip: Before you create a package with Lightning email templates, read about their behavior in Component Behavior in Packages. In the Implementation Guide, review the Components Available in Managed Packages section and especially the topic Components Automatically Added to Packages.

When you create a change set, choose from Lightning and Classic email templates.

Tip: Before you create a change set with Lightning email templates, review the considerations in Email Alert Actions and Special Behavior in Deployments.

SEE ALSO:

Salesforce Help: Change Sets (can be outdated or unavailable during release preview)

Salesforce Help: Package and Distribute Your Apps (can be outdated or unavailable during release preview)

IdeaExchange: Ability to add Lightning Email Templates to Changes Sets and Deploy from Sandbox *(partially delivered)*

Use Lightning Email Templates in Salesforce Automations

Now use Lightning email templates—including Email Template Builder email templates—in Salesforce automations, including email alerts, Flow, Workflow, Process Builder, Approval Processes, and more. For example, you can set up an email alert that sends an email to users about something that's happened, and include a Lightning email template with the email alert. Previously, when you set up an email alert you used Salesforce Classic email templates only.

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

How: Before you set up an automation with Lightning email templates, read about their behavior in Email Alert Actions..

SEE ALSO:

Salesforce Help: Email Alert Actions (can be outdated or unavailable during release preview)

IdeaExchange: Use Lightning Email Templates in Email Alerts *(partially delivered)*

Save Time with Duplicate Components in Email Template Builder

Sales reps can now create the perfect email template component and then duplicate it to reuse it. Previously, reps recreated components.

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.

How: When your component is the way you want it, click the duplicate button.

Move the duplicate component or leave it where it is. Make changes without affecting the original component.
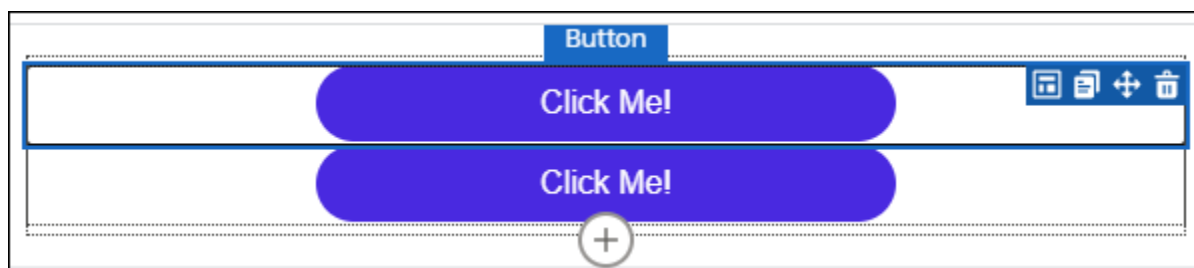
SEE ALSO:

Salesforce Help: Email Template Builder (can be outdated or unavailable during release preview)

Optimize Email Management

Now your reps can find email templates more easily with a renamed set of template choices. My Templates is now My Lightning Email Templates and All Templates is now All Lightning Templates. All Classic Templates hasn't changed.
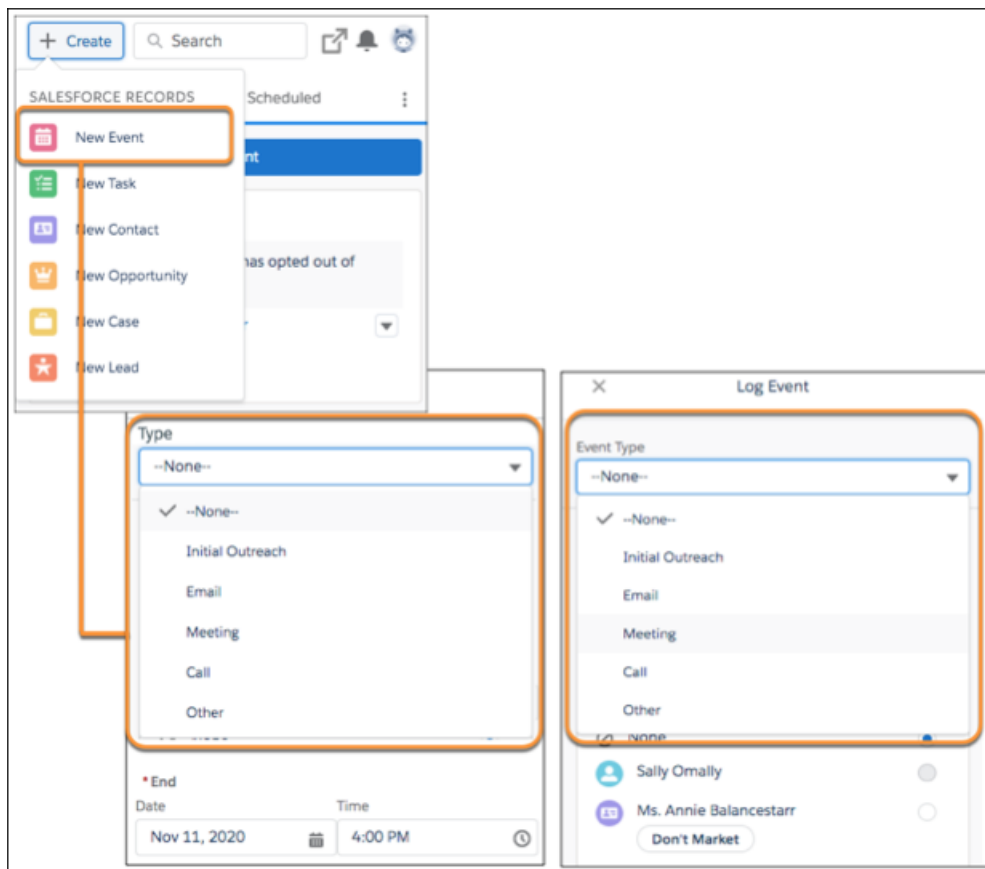
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: It's easier for users to find the correct template.
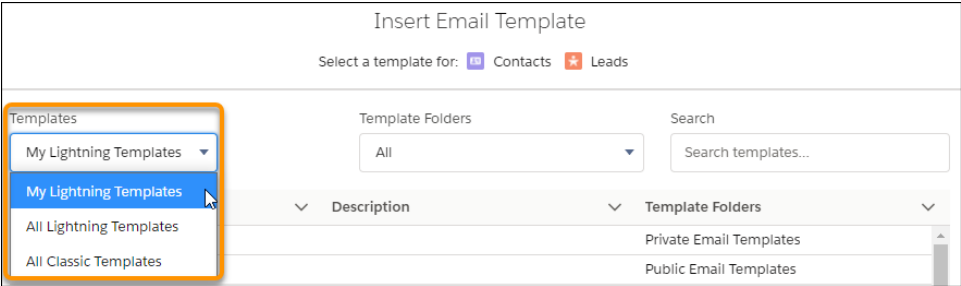
How: Review the old and new names.

Old Name	New Name	Result
My Templates	My Lightning Templates	All Lightning and Email Template Builder email templates you created.
All Templates	All Lightning Templates	All Lightning and Email Template Builder email templates you have access to
All Classic Templates	No change	All Salesforce Classic email templates you have access to

Einstein Activity Capture

Add users to a configuration by profile. Customize field mappings for contacts and events. You can also sync internal events.

IN THIS SECTION:

Add Profiles to Einstein Activity Capture Configurations

Manage your user assignments more effectively. When assigning users to a configuration, you can now add users based on their user profile. Previously, you could add only individual users, which was time consuming.

Customize Field Mappings for Contact and Event Sync

Control how contacts and events sync between Microsoft Exchange and Salesforce. By managing how fields map between the two applications, sales teams stay up to date about the information that's important to them.

Track your company's important events in Salesforce by syncing events where all attendees are part of your internal domain. Your company's default internal domain gets added to the Salesforce excluded list as always. Previously, internal events weren't synced between Salesforce and sales reps' connected accounts. But now you can change this behavior to sync your internal events.

Add Profiles to Einstein Activity Capture Configurations

Manage your user assignments more effectively. When assigning users to a configuration, you can now add users based on their user profile. Previously, you could add only individual users, which was time consuming.

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

How: When adding users to an Einstein Activity Capture configuration, select Profiles from the dropdown list. Only the users in the profile who have access to Einstein Activity Capture are added to the configuration.

SEE ALSO:

   Salesforce Help: Create a Configuration for Einstein Activity Capture (can be outdated or unavailable during release preview)

Customize Field Mappings for Contact and Event Sync

Control how contacts and events sync between Microsoft Exchange and Salesforce. By managing how fields map between the two applications, sales teams stay up to date about the information that's important to them.

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

How: From the Einstein Activity Capture settings page, select an existing configuration. Click the Field Mappings tab. From there you can delete or change a mapping.

- You can't customize mappings for standard fields that are used to match contacts and events during the sync process. For example, contacts are synced based on the email address, so the email field mappings can't be changed.
- Custom Salesforce fields aren't used in mappings.

SEE ALSO:

Sync Internal Events

Track your company's important events in Salesforce by syncing events where all attendees are part of your internal domain. Your company's default internal domain gets added to the Salesforce excluded list as always. Previously, internal events weren't synced between Salesforce and sales reps' connected accounts. But now you can change this behavior to sync your internal events.

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

How: To sync internal events, contact Salesforce Support.

SEE ALSO:

Salesforce Inbox

Check out the latest improvements to the Inbox mobile app.

IN THIS SECTION:

Salesforce Inbox Mobile

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

Salesforce Inbox Mobile

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work 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

Gmail™ Integration

Email Experience

Outlook® Integration

Gmail™ Integration

Email Experience

Calendar

Developer admins can offer users more setup assistance through the CalendarView object in the API.

IN THIS SECTION:

Create Shared, Public, Resource, and User List Calendars from the API

Developers can view, create, and distribute shared, public, resource, and user list calendars represented by the standard object CalendarView. Previously, only objects calendars could be created from the API.

Create Shared, Public, Resource, and User List Calendars from the API

Developers can view, create, and distribute shared, public, resource, and user list calendars represented by the standard object CalendarView. Previously, only objects calendars could be created from the API.

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

SEE ALSO:

New and Changed Objects (can be outdated or unavailable during release preview)

Object Reference for Salesforce and Lightning Platform: CalendarView (can be outdated or unavailable during release preview)

Dialer

Dialer has a new name.

IN THIS SECTION:

[Lightning Dialer Is Now Sales Dialer](#)

Lightning Dialer has a new (first) name. Your favorite suite of Salesforce telephony features is now Sales Dialer.

Lightning Dialer Is Now Sales Dialer

Lightning Dialer has a new (first) name. Your favorite suite of Salesforce telephony features is now Sales Dialer.

Where: This change applies to Sales Dialer in Lightning Experience. Sales Dialer is available for an additional cost in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Integration with Google

Legacy versions of the Inbox Chrome extension, which includes Inbox features such as Email Tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Gmail integration with Inbox. Reps can add Zoom links to meetings generated using the Insert Availability feature in the Gmail integration with Inbox. We're no longer introducing enhancements for Lightning Sync, but see what's new with our next-generation sync product, Einstein Activity Capture.

IN THIS SECTION:

[Gmail™ Integration](#)

Legacy versions of the Inbox Chrome extension, which includes Inbox features such as email tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Gmail integration with Inbox. Sales reps see related user records sorted in a different order. And reps can add Zoom links to meetings generated using the Inbox Insert Availability feature.

[Lightning Sync for Google](#)

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IN THIS SECTION:

[Legacy Version of the Inbox Chrome Extension for Gmail Is Being Retired March 31, 2021](#)

Reps who can access the legacy version of the Inbox Chrome extension can access Inbox features in the Gmail integration. In the Gmail integration, Inbox features are unlocked with an Inbox license. If your reps use legacy Inbox, you already have this license in place. Keep reading to learn how to make the move to the Gmail integration with Inbox.

Make Logging Easier with Improved People Matching in the Gmail Integration

If an email address matches multiple people records, reps now see standard users matched first, followed by contacts, leads, and then other users such as community users. The most relevant people record is selected by default, providing a more streamlined experience if you have community or partner users. For example, if a single email matches a contact and a partner or community user, the contact record is selected. Previously, all users regardless of their user type were grouped and listed first.

Profile Event Type Pick List Respected When Logging Events from the Gmail Integration

For consistency, when users log events from the Gmail integration, the selections available for event type now match the options available when creating events using the quick action menu. The event types are pulled from the user's profile for the Event object.

Add Zoom Meeting Links to Events Created with Insert Availability in the Gmail Integration with Inbox

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in the Gmail integration with Inbox. Automated Zoom meeting link additions mean reps no longer add links manually after attendees select an event time.

Get a More Accurate View of Emails Sent from Gmail Integration with Inbox

Sales managers now have a more accurate picture of the sales team's performance through the emails they send from the Gmail integration. All emails sent from the Gmail integration with Inbox are now included in engagement history, even if email tracking isn't turned on. Engagement events include replies to emails sent, out-of-office replies, and email bounces. Previously, only emails set to be tracked were included in engagement history.

Legacy Version of the Inbox Chrome Extension for Gmail Is Being Retired March 31, 2021

Reps who can access the legacy version of the Inbox Chrome extension can access Inbox features in the Gmail integration. In the Gmail integration, Inbox features are unlocked with an Inbox license. If your reps use legacy Inbox, you already have this license in place. Keep reading to learn how to make the move to the Gmail integration with Inbox.

Where: This change applies to legacy versions of Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

When: The legacy version of the Inbox Chrome extension for Gmail is being retired on March 31, 2021. After March 31, 2021, sales reps can't connect to Salesforce using the legacy Chrome Inbox extension. Reps can't log emails, review Salesforce record information, or use Inbox productivity features such as Insert Availability from within Gmail using the legacy extension. Inbox on mobile is still supported.

Why: We built the Inbox features into the Gmail integration, which is built on the trusted Salesforce platform. Inbox features are unlocked if you have an Inbox license and a user is set up to use Inbox. Using the platform provides a secure and customizable version of Inbox, which allows the introduction of future enhancements.

How: If the top of the Salesforce side panel in Gmail contains a cloud icon and a plus icon your reps are already running the Gmail integration. No further action is required.

If the top of the side panel in Gmail contains an envelope icon, reps are running the legacy version of the Inbox Chrome extension.

To move to the Gmail integration, complete a short Salesforce setup process and ensure that reps have the Salesforce app, which is available in the Chrome Web Store. For guidance about migrating to the Gmail integration with Inbox, see Salesforce Help.

🛑 **Important:** Make sure that your reps remove or disable the legacy Inbox extension before installing the Salesforce extension from the Chrome Web Store. The two extensions can't be enabled and run at the same time.

SEE ALSO:

Salesforce Help: Move from Legacy Salesforce Inbox to the Outlook or Gmail Integration with Inbox (can be outdated or unavailable during release preview)

Salesforce Help: Tips for Working in the Gmail Integration with Inbox (can be outdated or unavailable during release preview)

Make Logging Easier with Improved People Matching in the Gmail Integration

If an email address matches multiple people records, reps now see standard users matched first, followed by contacts, leads, and then other users such as community users. The most relevant people record is selected by default, providing a more streamlined experience if you have community or partner users. For example, if a single email matches a contact and a partner or community user, the contact record is selected. Previously, all users regardless of their user type were grouped and listed first.

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

Profile Event Type Pick List Respected When Logging Events from the Gmail Integration

For consistency, when users log events from the Gmail integration, the selections available for event type now match the options available when creating events using the quick action menu. The event types are pulled from the user's profile for the Event object.
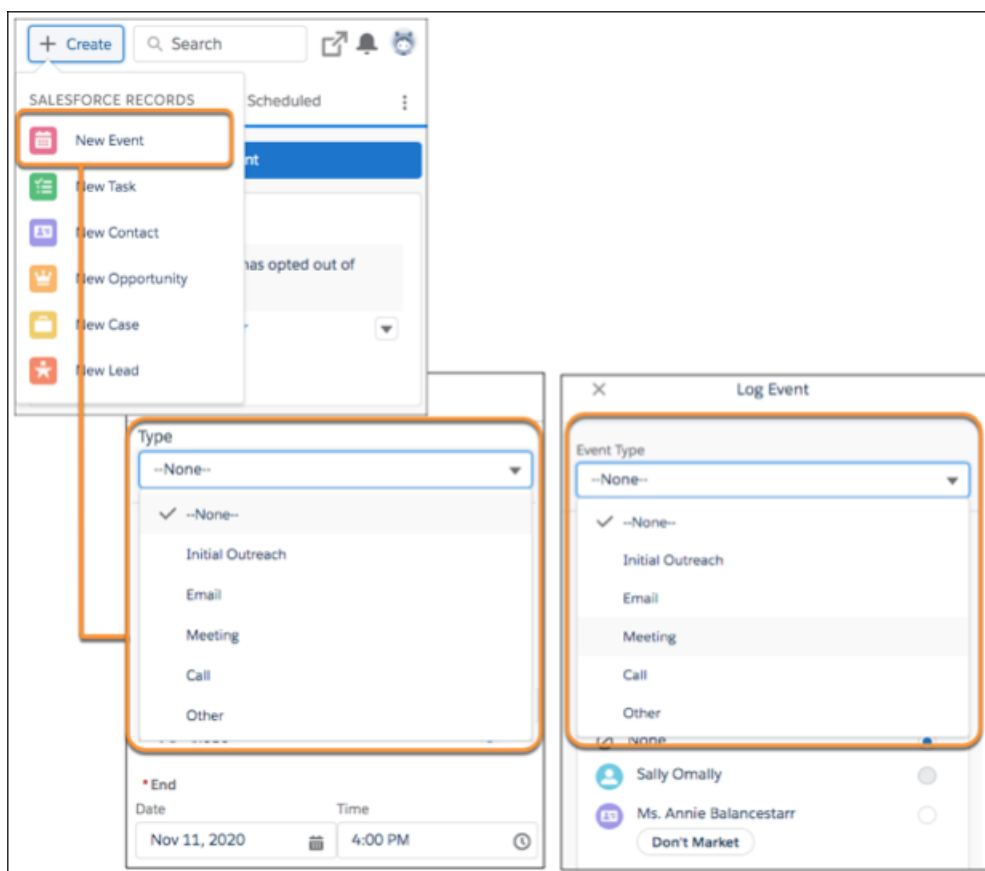
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: If you choose to classify the types of events that your reps log, the options for classifying are consistent when creating events and events from Gmail.

Salesforce Help: Email and Event Logging from Outlook and Gmail to Salesforce(can be outdated or unavailable during release preview)

Add Zoom Meeting Links to Events Created with Insert Availability in the Gmail Integration with Inbox

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in the Gmail integration with Inbox. Automated Zoom meeting link additions mean reps no longer add links manually after attendees select an event time.

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: This feature is available later in the Spring '21 release.

How: From Setup, in the Quick Find box, enter `Zoom`, and then select **Zoom Video Settings**. Complete the Zoom setup and turn on the integration with Zoom. After it's enabled, the Insert Availability screen includes the Zoom options.

Reps connect their corporate Zoom account the first time they use the Insert Availability feature in the Gmail integration. After connecting, reps can choose to add an automatically generated Zoom meeting link to the event invitation when an attendee selects a proposed time.

SEE ALSO:

Salesforce Help: Zoom Integration (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox (can be outdated or unavailable during release preview)

IdeaExchange: Insert Google Hangout or Zoom Link *(partially delivered)*

Get a More Accurate View of Emails Sent from Gmail Integration with Inbox

Sales managers now have a more accurate picture of the sales team's performance through the emails they send from the Gmail integration. All emails sent from the Gmail integration with Inbox are now included in engagement history, even if email tracking isn't turned on. Engagement events include replies to emails sent, out-of-office replies, and email bounces. Previously, only emails set to be tracked were included in engagement history.

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.

SEE ALSO:

Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Lightning Sync for Google

We're no longer introducing enhancements for Lightning Sync. But if you're interested in what's new with contact and event sync, learn about our next-generation sync product, Einstein Activity Capture.

IN THIS SECTION:

Scope Out the Latest on Syncing with Google Applications

While Lightning Sync remains available for customers who purchased Salesforce before Winter '21, we're no longer introducing Lightning Sync product enhancements. If you're curious about what's new with sync, check out Einstein Activity Capture.

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While Lightning Sync remains available for customers who purchased Salesforce before Winter '21, we're no longer introducing Lightning Sync product enhancements. If you're curious about what's new with sync, check out Einstein Activity Capture.

Where: Lightning Sync and Einstein Activity Capture are available in various editions. See the linked topics for details.

Why: If you explored Einstein Activity Capture in the past, you're probably most interested in the Spring '21 improvements for Google customers. Now you can assign users to Einstein Activity Capture configurations by user profile. To learn more, check out the Einstein Activity Capture release notes.

SEE ALSO:

> *Salesforce Help*: Compare Einstein Activity Capture and Lightning Sync (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: What Does Einstein Activity Capture Do? (can be outdated or unavailable during release preview)
>
> *Knowledge Article*: Lightning Sync: Not Available for New Customers as of Winter '21 (can be outdated or unavailable during release preview)

Integration with Microsoft®

Legacy versions of the Inbox Outlook add-in, which includes Inbox features such as Email Tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Outlook integration with Inbox. Reps can add Zoom links to meetings generated using the Insert Availability feature in the Outlook integration with Inbox. If you're a Lightning Sync user on Microsoft Office 365, make sure you're ready for Microsoft retirement of Basic Authentication in 2021. If you're still using Salesforce for Outlook, learn about how product retirement affects your users between 2021 and 2023.

IN THIS SECTION:

Outlook® Integration

Legacy versions of the Inbox Outlook add-in, which includes Inbox features such as email tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Outlook integration with Inbox. Sales reps see related user records sorted in a different order. And reps can add Zoom links to meetings generated using the Inbox Insert Availability feature.

Lightning Sync for Microsoft® Exchange

We're no longer introducing enhancements for Lightning Sync. But if you're interested in what's new with contact and event sync, learn about our next-generation sync product, Einstein Activity Capture. And current Lightning Sync users on Microsoft Office 365® must review their settings and prepare for Microsoft Basic Authentication retirement. Microsoft recently adjusted their Basic Authentication retirement timeline for some Exchange Online customers.

Salesforce for Outlook

If you're still using Salesforce for Outlook, learn about its phased retirement schedule beginning in Summer '21 and ending in June 2023. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to restore service.

Outlook® Integration

Legacy versions of the Inbox Outlook add-in, which includes Inbox features such as email tracking and Insert Availability, are being retired March 31, 2021. Inbox features are available in the Outlook integration with Inbox. Sales reps see related user records sorted in a different order. And reps can add Zoom links to meetings generated using the Inbox Insert Availability feature.

IN THIS SECTION:

Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending

Support for running the Outlook integration in Outlook 2013, Outlook 2016, and volume-licensed versions of Outlook 2019 ends December 31, 2021. 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.

Legacy Version of the Inbox Outlook Add-In Is Being Retired March 31, 2021

Reps who can access the legacy version of Inbox Outlook add-in can access Inbox features in the Outlook integration. In the Outlook integration, Inbox features are unlocked with an Inbox license. If your reps use legacy Inbox, you already have this license in place. Keep reading to learn how to make the move to the Outlook integration with Inbox.

Make Logging Easier with Improved People Matching in the Outlook Integration

If an email address matches multiple people records, reps now see standard users matched first, followed by contacts, leads, and then other users such as community users. The most relevant people record is selected by default, providing a more streamlined experience if you have community or partner users. For example, if a single email matches a contact and a partner or community user, the contact record is selected. Previously, all users regardless of their user type were grouped and listed first.

Profile Event Type Pick List Respected When Logging Events from the Outlook Integration

For consistency, when users log events from the Outlook integration, the selections available for event type now match the options available when creating events using the quick action menu. The event types are pulled from the user's profile for the Event object.

Add Zoom Meeting Links to Events Created with Insert Availability in the Outlook Integration with Inbox

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in the Outlook integration with Inbox. Automated Zoom meeting link additions mean reps no longer add links manually after attendees select an event time.

Get a More Accurate View of Emails Sent from Outlook Integration with Inbox

Sales managers now have a more accurate picture of the sales team's performance through the emails they send from the Outlook integration. All emails sent from the Outlook integration with Inbox are now included in engagement history, even if email tracking isn't turned on. Engagement events include replies to emails sent, out-of-office replies, and email bounces. Previously, only emails set to be tracked were included in engagement history.

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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: To ensure that you have the latest Microsoft security and product updates, we recommend that you always run the latest version 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: To ensure continued use of the Outlook integration past December 2021, plan to upgrade now to Office version 16.0.11629 or later and Windows 10 version 1903 or later.

SEE ALSO:

Salesforce Help: Outlook Integration System Requirements (can be outdated or unavailable during release preview)

Legacy Version of the Inbox Outlook Add-In Is Being Retired March 31, 2021

Reps who can access the legacy version of Inbox Outlook add-in can access Inbox features in the Outlook integration. In the Outlook integration, Inbox features are unlocked with an Inbox license. If your reps use legacy Inbox, you already have this license in place. Keep reading to learn how to make the move to the Outlook integration with Inbox.

Where: This change applies to legacy versions of Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

When: The legacy version of the Inbox Outlook add-in is being retired on March 31, 2021. After March 31, 2021, sales reps can't connect to Salesforce using the legacy Outlook add-in. Reps can't log emails, review Salesforce record information, or use Inbox productivity features such as Insert Availability from within Outlook using the legacy extension. Inbox on mobile is still supported.

Why: We built the Inbox features into the Outlook integration, which is built on the trusted Salesforce platform. Inbox features are unlocked if you have an Inbox license and a user is set up to use Inbox. Using the platform provides a secure and customizable version of Inbox, which allows the introduction of future enhancements.

How: If the top of the Salesforce side panel in Outlook contains a cloud icon and a plus icon, your reps are already running the Outlook integration. No further action is required.

If the top of the side panel in Outlook contains an envelope icon, reps are running the legacy version of the Inbox Outlook add-in.

To move to the Outlook integration, complete a short Salesforce setup process and ensure that reps have the Salesforce app, which is available in the AppSource Store. For guidance about migrating to the Outlook integration with Inbox, see Salesforce Help.

🛑 Important: Make sure that your reps remove or disable the legacy Inbox extension before installing the Salesforce extension from the AppSource Store. The two extensions can't be enabled and run at the same time.

SEE ALSO:

 Salesforce Help: Move from Legacy Salesforce Inbox to the Outlook or Gmail Integration with Inbox (can be outdated or unavailable during release preview)

 Salesforce Help: Tips for Working in the Outlook Integration with Inbox (can be outdated or unavailable during release preview)

Make Logging Easier with Improved People Matching in the Outlook Integration

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

Profile Event Type Pick List Respected When Logging Events from the Outlook Integration

For consistency, when users log events from the Outlook integration, the selections available for event type now match the options available when creating events using the quick action menu. The event types are pulled from the user's profile for the Event object.

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

Why: If you choose to classify the types of events that your reps log, the options for classifying are consistent when creating events and events from Outlook.

SEE ALSO:

   Salesforce Help: Email and Event Logging from Outlook and Gmail to Salesforce(can be outdated or unavailable during release preview)

Add Zoom Meeting Links to Events Created with Insert Availability in the Outlook Integration with Inbox

Sales reps can now connect their Zoom accounts and automatically add Zoom meeting links to invitations created using the Insert Availability feature in the Outlook integration with Inbox. Automated Zoom meeting link additions mean reps no longer add links manually after attendees select an event time.

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: This feature is available later in the Spring '21 release.

How: From Setup, in the Quick Find box, enter `Zoom`, and then select **Zoom Video Settings**. Complete the Zoom setup and turn on the integration with Zoom. After it's enabled, the Insert Availability screen includes the Zoom options.

Reps connect their corporate Zoom account the first time they use the Insert Availability feature in the Outlook integration. After connecting, reps can choose to add an automatically generated Zoom meeting link to the event invitation when an attendee selects a proposed time.

SEE ALSO:

Salesforce Help: Zoom Integration (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox (can be outdated or unavailable during release preview)

IdeaExchange: Insert Google Hangout or Zoom Link *(partially delivered)*

Get a More Accurate View of Emails Sent from Outlook Integration with Inbox

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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.

SEE ALSO:

Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Lightning Sync for Microsoft® Exchange

We're no longer introducing enhancements for Lightning Sync. But if you're interested in what's new with contact and event sync, learn about our next-generation sync product, Einstein Activity Capture. And current Lightning Sync users on Microsoft Office 365® must review their settings and prepare for Microsoft Basic Authentication retirement. Microsoft recently adjusted their Basic Authentication retirement timeline for some Exchange Online customers.

IN THIS SECTION:

Scope Out the Latest on Syncing with Microsoft Applications

While Lightning Sync remains available for customers who purchased Salesforce before Winter '21, we're no longer introducing Lightning Sync product enhancements. If you're curious about what's new with sync, check out Einstein Activity Capture.

Required Setting Changes for Some Microsoft Office 365 Customers

Starting in October 2020, Microsoft is retiring Basic Authentication retirement for Exchange Online (offered as part of Office 365) on a rolling basis. If you're using Exchange Online and a service account as your connection method, to avoid a sync interruption, check the latest Microsoft communications about the retirement timeline. Then work with your IT professional to update your Lightning Sync connection method. Or consider moving to Einstein Activity Capture.

Scope Out the Latest on Syncing with Microsoft Applications

While Lightning Sync remains available for customers who purchased Salesforce before Winter '21, we're no longer introducing Lightning Sync product enhancements. If you're curious about what's new with sync, check out Einstein Activity Capture.

Where: Lightning Sync and Einstein Activity Capture are available in various editions. See the linked topics for details.

Why: If you explored Einstein Activity Capture in the past, you're probably most interested in the Spring '21 improvements for Microsoft customers.

- Manage users more effectively. Assign users to Einstein Activity Capture configurations by user profile.
- Better control how contacts and events sync between Microsoft Exchange and Salesforce by managing how fields map between the two applications.

To learn more, check out the Einstein Activity Capture release notes.

SEE ALSO:

Salesforce Help: Compare Einstein Activity Capture and Lightning Sync (can be outdated or unavailable during release preview)

Salesforce Help: What Does Einstein Activity Capture Do? (can be outdated or unavailable during release preview)

Knowledge Article: Lightning Sync: Not Available for New Customers as of Winter '21 (can be outdated or unavailable during release preview)

Required Setting Changes for Some Microsoft Office 365 Customers

Starting in October 2020, Microsoft is retiring Basic Authentication retirement for Exchange Online (offered as part of Office 365) on a rolling basis. If you're using Exchange Online and a service account as your connection method, to avoid a sync interruption, check the latest Microsoft communications about the retirement timeline. Then work with your 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 Exchange Online who use a service account to connect to Salesforce.
- Current Lightning Sync customers on Exchange Online who plan on migrating to a Microsoft tenant created after October 2020. Basic authentication isn't available for Exchange Online on new Microsoft tenants, and an alternative authentication service is required to use Lightning Sync.
- Customers on Exchange Online who are new to Lightning Sync and must choose a connection method to set up the product. This scenario describes only a small number of customers, as Lighting Sync availability is limited.

These customers aren't affected:

- Customers on Exchange 2019®, 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: When Microsoft blocks Basic Authentication for Exchange Online in your Microsoft tenant, contacts and events stop syncing for those customers described in the Who section.

How: To avoid a sync interruption, work with the Microsoft admin or IT professional at your company to verify whether the retirement impacts you and when. Then, review the available solutions and select the one that works best. See Availability of the Lightning Sync Service Account Connection Method for Customers on Microsoft Office 365.

SEE ALSO:

External Link: Basic Authentication and Exchange Online – February 2021 Update

Salesforce Help: Lightning Sync System Requirements (can be outdated or unavailable during release preview)

Salesforce Help: Security Measures Specific to Your Connection Method (can be outdated or unavailable during release preview)

Salesforce for Outlook

If you're still using Salesforce for Outlook, learn about its phased retirement schedule beginning in Summer '21 and ending in June 2023. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to restore service.

IN THIS SECTION:

Salesforce for Outlook Is Being Retired Between Summer '21 and June 2023

The Salesforce for Outlook side panel action menu isn't available starting in the Summer '21 release. Salesforce for Outlook full product retirement is scheduled for June 2023. But don't worry, you can continue integrating Microsoft Outlook with Salesforce using our next-generation products, Outlook integration and Einstein Activity Capture. Not only do those products offer the latest features, they're also compatible with the latest versions of Outlook.

Restore Access If Service Is Interrupted

Changes in Salesforce Classic access can disrupt service for your Salesforce for Outlook users. Learn how to avoid disrupting Salesforce for Outlook service or how to restore past access until the June 2023 full product retirement.

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/Teams, Gmail, and Inbox Trailblazer Community.

Salesforce for Outlook Is Being Retired Between Summer '21 and June 2023

The Salesforce for Outlook side panel action menu isn't available starting in the Summer '21 release. Salesforce for Outlook full product retirement is scheduled for June 2023. But don't worry, you can continue integrating Microsoft Outlook with Salesforce using our next-generation products, Outlook integration and Einstein Activity Capture. Not only do those products offer the latest features, they're also compatible with the latest versions of Outlook.

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

How: After the side panel action menu is retired in Summer '21, the new records button (⊞) isn't available in the side panel. At that point, reps can no longer create Salesforce records from Outlook using Salesforce for Outlook.
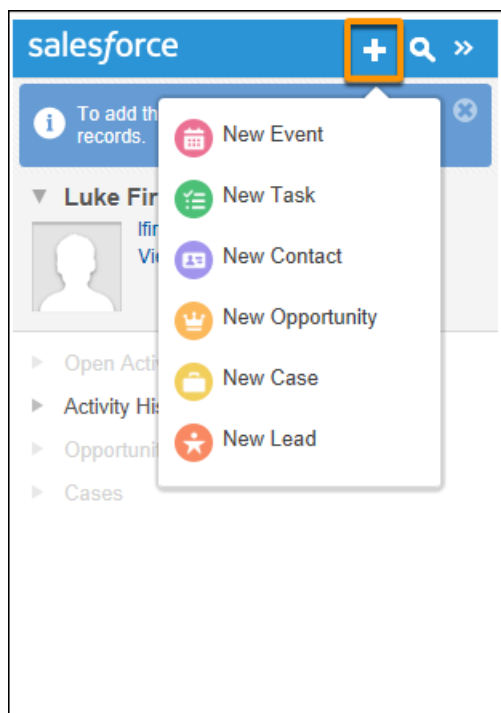
Remaining Salesforce for Outlook features are available until the full product is retired in June 2023. For more details on the action menu and full product retirement, see Salesforce for Outlook Retirement.

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 Spring '21. If you're ready, we encourage you to make the move sooner rather than later.

SEE ALSO:

> *Salesforce Help*: Move from Salesforce for Outlook to the Next-Generation Products (can be outdated or unavailable during release preview)

Restore Access If Service Is Interrupted

Changes in Salesforce Classic access can disrupt service for your Salesforce for Outlook users. Learn how to avoid disrupting Salesforce for Outlook service or how to restore past access until the June 2023 full product retirement.

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

Why: In 2016, Salesforce stopped supporting Lightning Experience on IE11. Salesforce for Outlook relies on IE11 to display Salesforce from Microsoft Outlook®, so when access to Salesforce Classic is blocked, access to Salesforce for Outlook is also blocked.

You can unintentionally block Salesforce for Outlook access for existing users in these two ways:

- You fully turn off access to Salesforce Classic by turning on the Make Lightning Experience your org's only experience setting in the Lightning Experience Transition Assistant.
- You hide your users' access to the Switcher, which lets users switch between Salesforce Classic and Lightning Experience.

How: To continue using Salesforce for Outlook until the 2023 retirement, avoid fully turning off your access to Salesforce Classic, at least for now. If you want to reduce your users' access to Salesforce Classic, we recommend making the switcher available for users who work

with Salesforce for Outlook only, and hiding the switcher for everyone else. Users aren't required to return to Salesforce Classic to access Salesforce for Outlook, but the switcher must be available to them.

Or, consider moving to our next-generation products, Outlook Integration and Einstein Activity Capture.

For help restoring access and more, 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/Teams, Gmail, and Inbox Trailblazer Community.

Where: These changes apply 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

Revenue

Salesforce CPQ improvements include smoother amendment and renewal service upgrades, background contract amendments, and a change ensuring correct price rule configuration. With Salesforce Billing, configure how invoice lines are created when you use a bill through date override, and map financial information to customer accounting and enterprise resource planning (ERP) systems. You can also highlight the long-term value of a lifecycle-managed asset. Standalone order activation and product creation logic are improved. And Advanced Approvals users can manage their approvals without logging in to Salesforce.

IN THIS SECTION:

Salesforce CPQ

Switch to the Large-Scale Amendment and Renewal Service and keep working while contracts are being amended. Ensure that users configure price rules correctly.

Salesforce Billing

Configure how Salesforce Billing creates invoice lines when you use a bill through date override. Map finance transaction and finance balance snapshot information to customer accounting and enterprise resource planning (ERP) systems. A new field highlights the long-term value of a lifecycle-managed asset, and standalone order activation and order product creation changed.

Advanced Approvals

Your Advanced Approvals users can manage their approvals without logging into Salesforce. Now approval and rejection API is exposed from the Advanced Approvals package.

SEE ALSO:

Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Spring '21 (can be outdated or unavailable during release preview)

Salesforce CPQ

Switch to the Large-Scale Amendment and Renewal Service and keep working while contracts are being amended. Ensure that users configure price rules correctly.

Note: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

Make a Smooth Switch to the Large-Scale Amendment and Renewal Service

Your users can now complete amendment and renewal transactions regardless of which amendment and renewal service you use. Previously, if field names on your contracts were long, you couldn't switch from the Legacy Amend/Renew Service to the Salesforce CPQ Large-Scale Amendment and Renewal Service.

Continue Working While You Amend Contracts

When you select a new option in the package setup, your users can now continue working in Salesforce while a contract amendment is in progress. Previously, users waited for the contract amendment process to finish. The new option is available when you deselect the option for the legacy service and use the Salesforce CPQ Large-Scale Amendment and Renewal service instead.

Configurator Evaluation Event Field Added to the Price Rules Page Layout

By default, the configurator evaluation event field is now included on the Price Rules page layout. It gets added automatically to save you a step and to ensure that your users select the required value when they configure a price rule.

Contract Larger Orders in Less Time

When your sales reps contract an order, Salesforce CPQ can now create a contract with twice as many line items as it could previously. The number of line items depends on your org's configuration.

New Permissions for Creating Orders

To create orders from quotes or opportunities, users now require Read access on quotes and opportunities, Create and Edit access on Orders, and Delete access on order products.

Permission Set Requirement Was Added for Contract Amendment and Renewal

When the Use Legacy Amend/Renew Service is deselected, the user who authorized the Salesforce CPQ calculator must have certain permissions. Otherwise, no users can amend or renew contracts.

SEE ALSO:

Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Spring '21 (can be outdated or unavailable during release preview)

Make a Smooth Switch to the Large-Scale Amendment and Renewal Service

Your users can now complete amendment and renewal transactions regardless of which amendment and renewal service you use. Previously, if field names on your contracts were long, you couldn't switch from the Legacy Amend/Renew Service to the Salesforce CPQ Large-Scale Amendment and Renewal Service.

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

SEE ALSO:

Salesforce Help: Things to Know About Amendment and Renewal Services (can be outdated or unavailable during release preview)

Continue Working While You Amend Contracts

When you select a new option in the package setup, your users can now continue working in Salesforce while a contract amendment is in progress. Previously, users waited for the contract amendment process to finish. The new option is available when you deselect the option for the legacy service and use the Salesforce CPQ Large-Scale Amendment and Renewal service instead.

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

How: From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**. Click the **Subscriptions and Renewals** tab. If **Use Legacy Amend/Renew Service** is selected, deselect it, and then select **Amend Contracts in Background**.

SEE ALSO:

Permission Set Requirement Was Added for Contract Amendment and Renewal

Salesforce Help: Things to Know About Amendment and Renewal Services (can be outdated or unavailable during release preview)

Configurator Evaluation Event Field Added to the Price Rules Page Layout

By default, the configurator evaluation event field is now included on the Price Rules page layout. It gets added automatically to save you a step and to ensure that your users select the required value when they configure a price rule.

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

Who: This change is available to customers who purchased Salesforce Shield or Event Monitoring and Shield Platform Encryption add-on subscriptions.

How: Create a new Price Rule by selecting **New** from the Price Rules tab. That's it! The Configurator Evaluation Event field is part of the New Price Rules dialog.

Contract Larger Orders in Less Time

When your sales reps contract an order, Salesforce CPQ can now create a contract with twice as many line items as it could previously. The number of line items depends on your org's configuration.

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

New Permissions for Creating Orders

To create orders from quotes or opportunities, users now require Read access on quotes and opportunities, Create and Edit access on Orders, and Delete access on order products.

Where: This change applies to Salesforce Lightning and Salesforce Classic in Salesforce CPQ.

SEE ALSO:

> *Salesforce Help:* Salesforce CPQ Permissions (can be outdated or unavailable during release preview)

Permission Set Requirement Was Added for Contract Amendment and Renewal

When the Use Legacy Amend/Renew Service is deselected, the user who authorized the Salesforce CPQ calculator must have certain permissions. Otherwise, no users can amend or renew contracts.

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

How: Assign the Salesforce CPQ Admin permission set to the user who authorized the Salesforce CPQ calculator during package configuration. To identify the user who authorized the Salesforce CPQ calculator, see the knowledge article Salesforce CPQ Authorize New Calculation Service best practice.

Salesforce Billing

Configure how Salesforce Billing creates invoice lines when you use a bill through date override. Map finance transaction and finance balance snapshot information to customer accounting and enterprise resource planning (ERP) systems. A new field highlights the long-term value of a lifecycle-managed asset, and standalone order activation and order product creation changed.

IN THIS SECTION:

Create Partial Periods When Using a Bill Through Date Override

Control how your invoice lines reflect your billing periods after using Bill Through Date Override. We added the billing rule field Period Treatment for BTDO, which controls how Salesforce creates invoice lines when a Bill Through Date Override value creates a partial billing period. Previously, Salesforce Billing created only one invoice line covering the partial period and any remaining full periods.

Use New ERP-Mapping Fields for Finance Transactions

Give your finance users more control over tracking general ledger (GL) and finance period information on their finance transactions. Then they can easily map the transactions to their downstream ERP systems for accounting close processes.

Understand the Long-Term Value of Each Lifecycle-Managed Asset

A new Total Lifecycle Amount field shows the total of a lifecycle-managed asset across its initial sale, amendments, renewals, and other changes. As of Spring '21, the field is populated on all lifecycle-managed assets. On other assets, it's null. Use field-level security to add the field to layouts, and take advantage of it in reporting.

Standalone Order Activation Logic Was Updated

Salesforce Billing now activates standalone orders and their child standalone order products at the same time. Previously, when you activated a standalone order, Salesforce Billing didn't activate its order products. Users had to activate the standalone order products on their own or through automation.

Standalone Order Product Creation Logic Was Updated

Standalone order products no longer require as much editing after creation. Now, when you create a standalone order, its child order products inherit the product's charge type, billing frequency, and billing type. If any order products were related to a product with a product consumption schedule and rates, the order products also receive order product consumption schedules and rates.

Improve the usage pricing experience for sales reps working with evergreen subscriptions. Sales reps can now upload usage to an active evergreen subscription order product at any time. If the usage's processing date doesn't fall within one of the order product's active, uninvoiced usage summaries, Salesforce Billing creates a usage summary and assigns it the new usage.

SEE ALSO:

Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Spring '21 (can be outdated or unavailable during release preview)

Create Partial Periods When Using a Bill Through Date Override

Control how your invoice lines reflect your billing periods after using Bill Through Date Override. We added the billing rule field Period Treatment for BTDO, which controls how Salesforce creates invoice lines when a Bill Through Date Override value creates a partial billing period. Previously, Salesforce Billing created only one invoice line covering the partial period and any remaining full periods.

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

Why: Previously, if you set a Bill Through Override Date on an order product, Salesforce Billing ignored the value of the Partial Period Treatment field and produced only one invoice line. It also ignored the order product's billing day of month during proration calculation. For example, let's say you have an order product with a start date of 05/20/20, end date of 07/28/20, and Billing Day of Month of 28. In a standard invoicing procedure, your order product will create three invoice lines.

Invoice Line	Start Date	End Date
1	05/20/20	05/27/20
2	05/28/20	06/27/20
3	06/28/20	07/27/20

Let's say you added a Bill Through Override Date of 07/31/20 before invoicing. If you don't have a value for your Period Treatment for BTDO field, Salesforce Billing would create only one invoice line, preventing you from creating invoice lines that reflected your multiple billing periods. Salesforce Billing would also ignore the billing day of month, so the periods used to calculate the invoice line's overall balance would be prorated differently. These proration differences may cause undesired balances for users who were expecting the billing day of month to be considered.

Invoice Line	Start Date	End Date
1	05/20/20	07/31/20

Now, the value of Period Treatment for BTDO controls how Salesforce manages invoice lines for the partial periods.

Separate

Create separate invoice lines for the partial period and any remaining full periods, and include Billing Day of Month when calculating the invoice line balances.

Combine

Combine the partial period and any remaining full periods into one invoice line, and include Billing Day of Month when calculating the invoice line balances.

Exclude Billing Day of Month

> Combine the partial period and any remaining full periods into one invoice line, and ignore the billing day of month when calculating invoice line balances. This calculation process works the same as earlier versions of Salesforce Billing, where the partial period treatment was ignored for orders with a Bill Through Date Override.

With a Period Treatment for BTDO value of Separate, the invoicing process would produce four invoice lines. Because the billing day of month is different from the start date, the first invoice line represents a partial period. Due to the bill through date override, the final invoice line is a partial period as well.

Table 1: Period Treatment for BTDO: Separate

Invoice Line	Start Date	End Date
1	05/20/20	05/27/20
2	05/28/20	06/27/20
3	06/28/20	07/27/20
4	07/28/20	07/31/20

If your value is Combine, Salesforce Billing calculates the same periods as Separate, but wraps all the periods into one invoice line.

Table 2: Period Treatment for BTDO: Combine

Invoice Line	Start Date	End Date
1	05/20/20	07/31/20

If your value is Exclude Billing Day of Month, Salesforce Billing produces one invoice line but ignores Billing Day of Month during proration calculations. As a result, the invoice line balance will vary based on your bill through date override, start date, and end date. In this example, the balance will be the same as if you had used Combine, though other date combinations may cause a different balance.

Table 3: Period Treatment for BTDO: Exclude Billing Day of Month

Invoice Line	Start Date	End Date
1	05/20/20	07/31/20

SEE ALSO:

> *Salesforce Help:* Managing Partial Periods When Using Bill Through Date Override (can be outdated or unavailable during release preview)

Use New ERP-Mapping Fields for Finance Transactions

Give your finance users more control over tracking general ledger (GL) and finance period information on their finance transactions. Then they can easily map the transactions to their downstream ERP systems for accounting close processes.

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

How: These fields are added to finance transactions. They're Salesforce fields separate from the Salesforce Billing package. Salesforce populates these fields during finance transaction creation. Each field looks up to a value on an accounting entity related to the finance transaction when the finance transaction was created. Users and processes can't change them.

Users and processes can't change fields with Original in their names but they can update the Billing package fields if needed.

- Original Credit GL Account Name
- Original Credit GL Account Number
- Original Debit GL Account Name
- Original Debit GL Account Number
- Original Finance Period Name
- Original Finance Period Start Date
- Original Finance Period End Date
- Original Finance Period Status
- Original GL Rule Name
- Original GL Treatment Name
- Original Finance Book Name

These fields are added to finance transactions and finance balance snapshots. Billing package fields are noted with (Billing Package Only). All other fields are part of Salesforce. You can use them for ERP mapping and to provide more information about the external finance system that you use to record your finance transactions. Users and processes can change them if needed.

- GL Rule (Billing Package Only)
- GL Treatment (Billing Package Only)
- Credit GL Account (Billing Package Only)
- Debit GL Account (Billing Package Only)
- Finance Book (Billing Package Only)
- Finance Period (Billing Package Only)
- Finance System Integration Mode
- Finance System Integration Status
- Finance System Name
- Finance System Transaction Number

> **Note:** Salesforce Billing automatically creates finance balance snapshots for finance transactions that have a reference entity type of Invoice, Credit Memo, Debit Memo, Payment, or Refund. But Finance and GL field values don't transfer from the transaction to the snapshot. We recommend using triggers or processes to copy Finance and GL information from the transaction to its child snapshots.

SEE ALSO:

Salesforce Help: Finance Transaction Fields (can be outdated or unavailable during release preview)

Salesforce Help: Finance Balance Snapshot Fields (can be outdated or unavailable during release preview)

Knowledge Article: Verifying Finance Logging is provisioned for your org (can be outdated or unavailable during release preview)

Understand the Long-Term Value of Each Lifecycle-Managed Asset

A new Total Lifecycle Amount field shows the total of a lifecycle-managed asset across its initial sale, amendments, renewals, and other changes. As of Spring '21, the field is populated on all lifecycle-managed assets. On other assets, it's null. Use field-level security to add the field to layouts, and take advantage of it in reporting.

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

Why: The field complements details about a lifecycle-managed asset, highlighting the asset's value given past and projected changes.
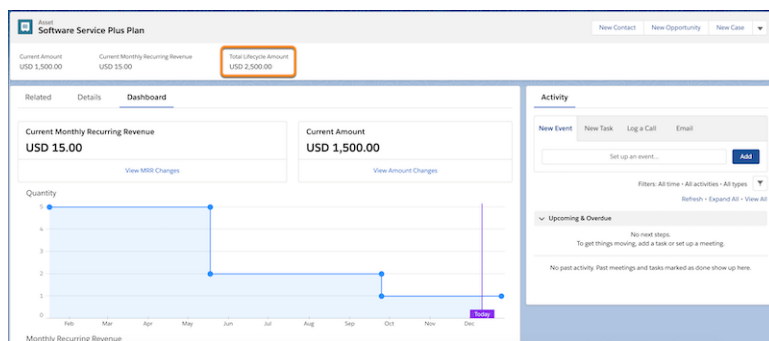
SEE ALSO:

Salesforce Help: Understand What Your Customers Have Bought by Using Customer Asset Lifecycle Management (can be outdated or unavailable during release preview)

Standalone Order Activation Logic Was Updated

Salesforce Billing now activates standalone orders and their child standalone order products at the same time. Previously, when you activated a standalone order, Salesforce Billing didn't activate its order products. Users had to activate the standalone order products on their own or through automation.

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

How: When you activate a standalone order, Salesforce Billing activates all the order's child standalone order products.

🛑 Important: A standalone order product refers to an order product that doesn't have a parent quote line. If you activate a standalone order with child order products that have parent quote lines, Salesforce Billing doesn't activate them. In this case, only the standalone order and its standalone order products are activated.

SEE ALSO:

Salesforce Help: Creation and Activation Guidelines for Standalone Orders (can be outdated or unavailable during release preview)

Standalone Order Product Creation Logic Was Updated

Standalone order products no longer require as much editing after creation. Now, when you create a standalone order, its child order products inherit the product's charge type, billing frequency, and billing type. If any order products were related to a product with a product consumption schedule and rates, the order products also receive order product consumption schedules and rates.

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

SEE ALSO:

Salesforce Help: Creation and Activation Guidelines for Standalone Orders (can be outdated or unavailable during release preview)

Automatic Usage Summaries for Evergreen Usage-Based Subscriptions

Improve the usage pricing experience for sales reps working with evergreen subscriptions. Sales reps can now upload usage to an active evergreen subscription order product at any time. If the usage's processing date doesn't fall within one of the order product's active, uninvoiced usage summaries, Salesforce Billing creates a usage summary and assigns it the new usage.

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

Why: Previously, when a sales rep ordered an evergreen subscription product related to a consumption schedule, Salesforce CPQ created an order product with 12 usage summaries. The first usage summary started on the order product's start date, and each summary was the length of the consumption schedule's billing term. Sales reps created further usage summaries manually for as long as the evergreen subscription was active.

How: The new usage summary follows the same billing periods as the order product's previous usage summaries. For example, if the order product had monthly billing frequency, a billing date of 1, and a term of 01/01/20 through 12/31/20, it created 12 usage summaries. Each summary began on the first of the month and ended on the last of the month. If the sales rep uploads usage with a usage date of 03/20/21, Salesforce Billing creates a usage summary for 03/01/21 through 03/31/21.

> 📝 Note: Sound familiar? This feature was briefly available in Summer '20, but we removed it after it suffered from a case of stage fright. After more preparation, it's now ready for the spotlight.

SEE ALSO:

> *Salesforce Help:* Ordering Consumption Schedules with Evergreen Subscriptions (can be outdated or unavailable during release preview)

Advanced Approvals

Your Advanced Approvals users can manage their approvals without logging into Salesforce. Now approval and rejection API is exposed from the Advanced Approvals package.

Where: This change applies to Lightning Experience and Salesforce Classic in Salesforce CPQ with Advanced Approvals.

Why: Previously, approval managers accessed the Advanced Approvals package in Salesforce to approve or reject a sales rep's approval request. Now, you can implement approval and rejection API in an outside platform so that your approval managers no longer must access Salesforce during the approval process.

How: Advanced Approval API is available as long as the Salesforce setting Disable API is unchecked. This setting is unchecked by default. To access it, from Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

Industries

An unprecedented wave of new vertical solutions awaits you. Loyalty management helps you run personalized customer recognition, reward, and retention programs. Batch management lets you process and track millions of records. With decision tables, you can define multiple business rules to evaluate products and calculate discounts. Our new data processing engine extracts and transforms data from your org and creates records with the transformed data. It's easier to manage sales agreements and account forecasts in Manufacturing Cloud, and Rebate Management supports volume-, revenue-, and growth-based rebate programs. Meanwhile, Health Cloud makes provider management easier with a new API and new FHIR-aligned support for electronic health records, and Financial Services Cloud helps you track branch performance and capture life events and business milestones on the go. Consumer Goods Cloud makes store visits and deliveries smarter, while Public Sector Solutions adds calendar support and makes application approval more transparent. Emergency Response Management adds updated flows to improve your emergency response experience.

IN THIS SECTION:

Loyalty Management

Loyalty Management, an end-to-end solution built on the Salesforce platform, helps organizations design and implement innovative programs for customer recognition, reward, and retention. You can create personalized loyalty programs, onboard program partners, and run promotions to boost customer engagement and get a better return on your investment. Loyalty Management is versatile and can cater to B2B and B2C business needs in any industry (generally available).

Batch Management

Process millions of records in your Salesforce org using Batch Management. Track the status and health of Batch Management jobs using Monitor Workflow Services (generally available).

Decision Tables

Decision tables read business rules and deliver outcomes for business scenarios. For example, you can define multiple business rules for product discount and create a decision table that evaluates products against the rules to calculate discounts for each product. Use a decision table in a flow to get outcomes on schedule or when required (generally available).

Data Processing Engine

Extract data from standard objects and custom objects in your Salesforce org and transform it based on your business requirements. Then create, update, or upsert records with the transformed data (generally available).

Manufacturing Cloud

Manage sales agreements easily with new features and enhancements. Convert quotes and opportunities directly to easily trackable sales agreements using a new Connect API resource. Manage account forecasts better with an option to consider opportunity schedules in forecasting. Delete existing sales agreements to cater to changed requirements.

Rebate Management

Run volume-, revenue-, and growth-based rebate programs with Rebate Management. Build long-lasting channel relationships through transparent and mutually profitable incentives. Create rebate programs and specify the type of rebate, eligibility rules, and benefit structure, including thresholds. Calculate payouts in context by working with your partners, and analyze payout information at the end of term or anytime. Rebate payouts are processed at the cadence you select with the detail you want. Use the Manufacturing Experience Cloud template to create a site and collaborate with your partners. Get actionable insights on your rebates with Einstein Analytics for Rebates (generally available).

Health Cloud

Health Cloud brings you better ways to manage your patient and provider data. We've made it easier to create provider records, and we've built a new FHIR-aligned data model for electronic health records. Intelligent Document Management is more flexible and easier to use, and Intelligent Sales adds calendars to help your users get more out of surgical visits.

Financial Services Cloud

Track branch performance and productivity with new Branch Management features. Capture life events and business milestones on-the-go, and get more control over display options for the Policy component. See more at-a-glance in Actionable Relationship Center (ARC), which now includes Compliant Data Sharing participants and a configurable set of related lists. Enhance Compliant Data Sharing with participant groups and non-owner participant sharing. Take structured notes of client or partner interactions and share them with stakeholders in a compliant manner with the new Interaction Summaries feature. Speed up document-driven processes by using Intelligent Form Reader to recognize and copy data from uploaded files. Optimize record rollups and rollup-by-lookup (RBL) calculations with improved code and the high-performance RBL framework.

Consumer Goods Cloud

Ensure that reps perform the right activities during their store visits with Einstein Visit Task Recommendations. Streamline store deliveries by creating vehicle-user assignments for reps. Predefine activity sequences to help your reps perform their visit tasks in the most effective order. Help sales managers create retail store records faster with the Retail Store enhancements. And with the Visit Execution and Direct Store Delivery enhancements, help your reps become more efficient during their store visits.

Public Sector Solutions

Add visits to the Salesforce calendar, and help your compliance officers quickly and easily check inspectors' availability when scheduling visits. New features in the Inspection Management Mobile app improve the overall inspection experience. And enhancements to the Public Sector portal improve process efficiency and ensure complete transparency throughout the application approval process.

Emergency Response Management

Updated flows make your emergency response management experience smoother.

More Information About Communities User Licenses for Industries

We've created a new help page that lays out in detail the objects that you can share with Experience Cloud users. Use this new resource to help plan your Experience Cloud site implementation based on the licenses you have.

Loyalty Management

Loyalty Management, an end-to-end solution built on the Salesforce platform, helps organizations design and implement innovative programs for customer recognition, reward, and retention. You can create personalized loyalty programs, onboard program partners, and run promotions to boost customer engagement and get a better return on your investment. Loyalty Management is versatile and can cater to B2B and B2C business needs in any industry (generally available).

IN THIS SECTION:

Build a Unique Loyalty Experience with Loyalty Program

Customize and assemble your own loyalty program from an integrated set of loyalty building blocks. Create a loyalty program and then add tiers, program currencies, benefits, partners, vouchers, and promotions. Track member activities and behaviors. Reward and recognize members with points or vouchers for their loyalty.

Drive Your Business Goals with Promotions

Increase product sales when you offer valuable promotions to targeted members. Boost member engagement and get a better return on your investment with attractive offers. Use standard promotions to provide immediate benefits to members. Use cumulative promotions to reward members based on their longer-term behaviors, such as participation frequency or spending. Offer vouchers or loyalty points to acquire new customers or engage existing customers.

Increase Your Member Engagement with Loyalty Program Partners

Loyalty Management helps increase member engagement by facilitating the onboarding and management of cross-industry program partners. Partnerships provide more opportunities to engage members and help them earn or redeem points for complementary products or services.

Reward Members with Experiential Vouchers

Help your loyal customers feel valued and keep them engaged with experiential vouchers. Reward your members with vouchers as part of a transaction or promotion, or for upgrading to a higher tier. Vouchers can include a fixed monetary value, a discount percentage, or a free product or service, depending on the associated product or service.

Delight Your Members with Loyalty Benefits

Excite your members with exclusive perks and privileges from a loyalty program. Reward and motivate customers when they increase their engagement with the loyalty program. Create a connected customer experience by configuring experiential benefits in the Salesforce ecosystem or push these benefits to other systems.

Let Members Track Activities with the Loyalty Member Portal

Keep your loyalty members engaged by letting them track their own progress in the program with the Loyalty Member Portal. With a few clicks, admins can set up loyalty member portal where the program members can view their profile details, recent transactions, points balance, and current tiers.

Analytics for Loyalty

Analyze your loyalty programs and design strategies to drive member engagement, ensure member satisfaction, and increase revenue. Use the Einstein Discovery for Loyalty Analytics app to get predictive insights that help you improve loyalty program member engagement.

Loyalty Management New Objects

Access more data through new Loyalty Management objects.

Loyalty Management Has New Metadata Types

Use the new metadata types for Loyalty Management.

Apex: New Items

These methods and classes are new.

Connect REST API

Loyalty Management REST API includes new calls.

Loyalty Management Has New Invocable Actions

Use the new invocable actions for Loyalty Management.

Build a Unique Loyalty Experience with Loyalty Program

Customize and assemble your own loyalty program from an integrated set of loyalty building blocks. Create a loyalty program and then add tiers, program currencies, benefits, partners, vouchers, and promotions. Track member activities and behaviors. Reward and recognize members with points or vouchers for their loyalty.

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

How: From the App Launcher, open **Loyalty Management**. To create a loyalty program, on the Loyalty Programs tab, click **New**.

Drive Your Business Goals with Promotions

Increase product sales when you offer valuable promotions to targeted members. Boost member engagement and get a better return on your investment with attractive offers. Use standard promotions to provide immediate benefits to members. Use cumulative promotions to reward members based on their longer-term behaviors, such as participation frequency or spending. Offer vouchers or loyalty points to acquire new customers or engage existing customers.

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

How: Identify your campaign members using data segments in Customer 360 Audiences or Salesforce reports. Create Promotions within Loyalty Programs, map them to Customer Segments, and execute them through Marketing Cloud. Use Marketing Cloud Connect to send loyalty promotions to Marketing Cloud where necessary.

Increase Your Member Engagement with Loyalty Program Partners

Loyalty Management helps increase member engagement by facilitating the onboarding and management of cross-industry program partners. Partnerships provide more opportunities to engage members and help them earn or redeem points for complementary products or services.

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

How: From the Loyalty Management, select your **Loyalty Program**. To create a Loyalty Program Partner, on the Setup tab, under Loyalty Program Partners, click **New**.

Reward Members with Experiential Vouchers

Help your loyal customers feel valued and keep them engaged with experiential vouchers. Reward your members with vouchers as part of a transaction or promotion, or for upgrading to a higher tier. Vouchers can include a fixed monetary value, a discount percentage, or a free product or service, depending on the associated product or service.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Loyalty Management is enabled.

How: From the Loyalty Management, select your **Loyalty Program**. To create a voucher definition, on the Loyalty Experiences tab, under Voucher Definitions, click **New**.

Delight Your Members with Loyalty Benefits

Excite your members with exclusive perks and privileges from a loyalty program. Reward and motivate customers when they increase their engagement with the loyalty program. Create a connected customer experience by configuring experiential benefits in the Salesforce ecosystem or push these benefits to other systems.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Loyalty Management is enabled.

How: From the Loyalty Management, select your **Loyalty Program**. To create a benefit type, from Setup tab, under Benefit Types, click **New**.

Let Members Track Activities with the Loyalty Member Portal

Keep your loyalty members engaged by letting them track their own progress in the program with the Loyalty Member Portal. With a few clicks, admins can set up loyalty member portal where the program members can view their profile details, recent transactions, points balance, and current tiers.

Where: This feature is available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to Experience Cloud site admins and users with the Loyalty Management license.

How: Using the Loyalty Member Portal template, the admin can set up a feature-rich loyalty member portal and customize the portal based on the company's requirements.
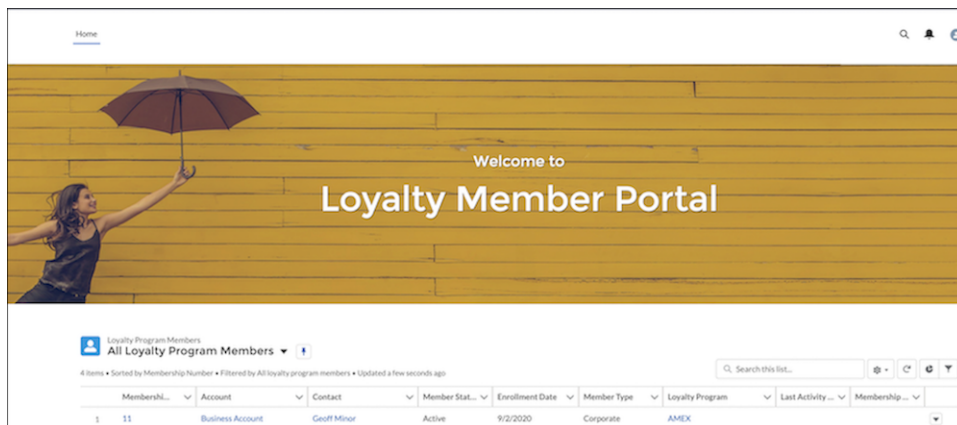
🔵 **Note:** You can set up similar loyalty member portals by integrating Loyalty Management with third-party applications using Connect APIs.

Analytics for Loyalty

Analyze your loyalty programs and design strategies to drive member engagement, ensure member satisfaction, and increase revenue. Use the Einstein Discovery for Loyalty Analytics app to get predictive insights that help you improve loyalty program member engagement.

IN THIS SECTION:

Analyze Customer Loyalty and Grow Your Business

Analytics for Loyalty app dashboards give insights into loyalty programs and help program managers devise strategies to increase membership, retain customers, and improve processes. You can also embed dashboards on loyalty program member pages to get immediate insights into your member's value, engagement, and preferences, and the assistance provided to them.

Improve Member Engagement with Einstein Discovery for Loyalty

Use the Einstein Discovery for Loyalty Analytics app to view members' engagement score, identify factors affecting their engagement, and devise strategies to improve it.

Analyze Customer Loyalty and Grow Your Business

Analytics for Loyalty app dashboards give insights into loyalty programs and help program managers devise strategies to increase membership, retain customers, and improve processes. You can also embed dashboards on loyalty program member pages to get immediate insights into your member's value, engagement, and preferences, and the assistance provided to them.

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

Who: To create an app from the Analytics for Loyalty template, you must have the Loyalty Analytics Plus add-on license.

Why: Use the Loyalty Program Performance dashboard to analyze a program based on member acquisition, engagement, satisfaction, partners, and products.
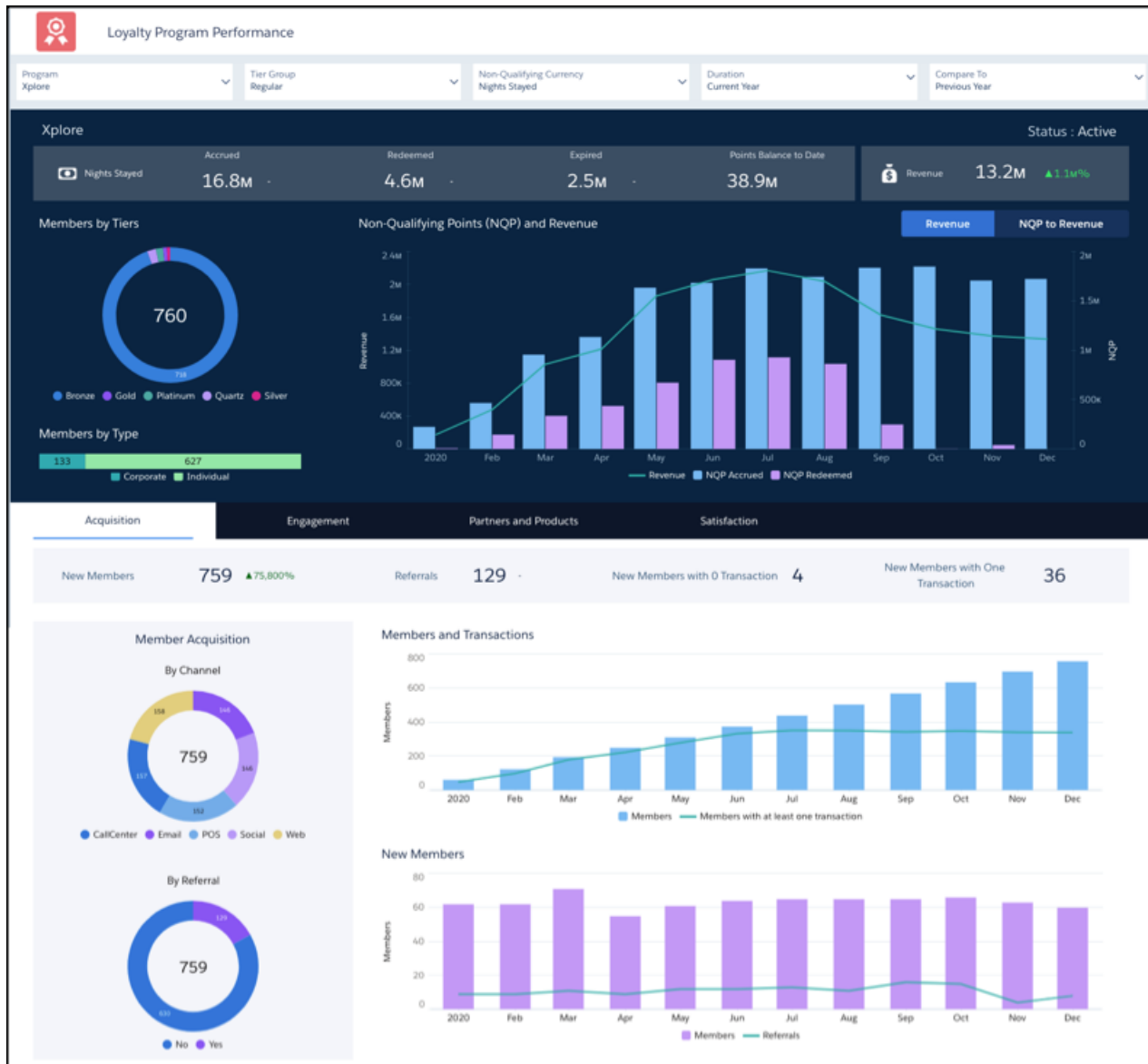
The Loyalty Member Services dashboard gives you actionable insights into the types of assistance you provide to loyalty members.
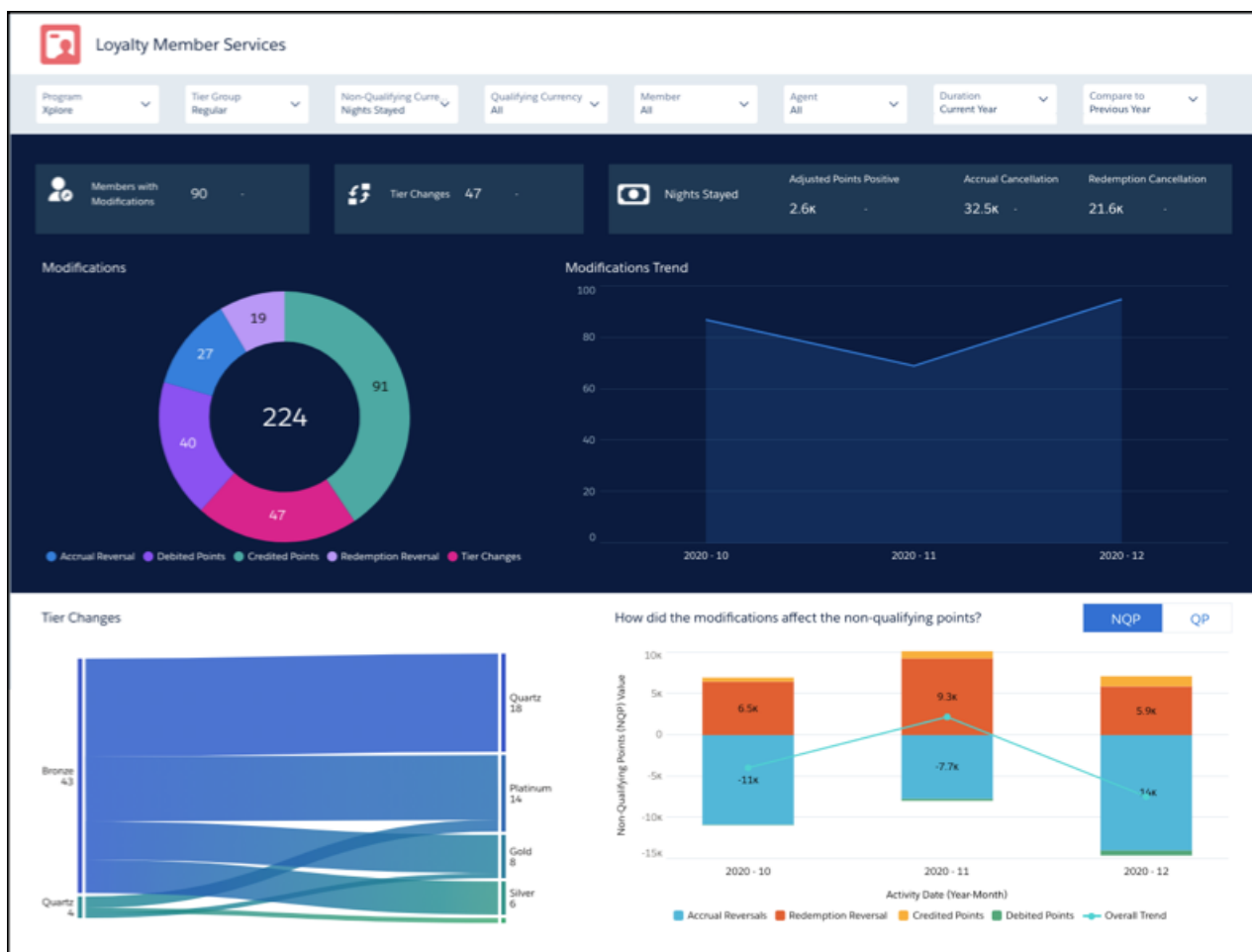
How: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select **Analytics for Loyalty**, and follow the instructions in the wizard to create your app.

Improve Member Engagement with Einstein Discovery for Loyalty

Use the Einstein Discovery for Loyalty Analytics app to view members' engagement score, identify factors affecting their engagement, and devise strategies to improve it.

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

Who: To create an app from the Einstein Discovery for Loyalty Analytics template, you must have the Loyalty Analytics Plus add-on license.

Why: The Einstein Discovery for Loyalty Analytics app gives predictions about member engagement based on factors such as demographics, enrollment channel, transactions, and membership duration.

How: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select **Einstein Discovery for Loyalty Analytics** and follow the instructions in the wizard to create your app.

Loyalty Management New Objects

Access more data through new Loyalty Management objects.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Loyalty Management is enabled.

View all the benefits

Use the new `Benefit` object.

View the action that's automatically triggered for a benefit

Use the new `BenefitAction` object.

View the type of benefits

Use the new `BenefitType` object.

View information about each transaction performed by a member in a loyalty program

Use the new `LoyaltyLedger` object.

Associate loyalty member tiers with the loyalty program currency

Use the new `LoyaltyMemberCurrency` object.

Associate loyalty program members with the loyalty tier

Use the new `LoyaltyMemberTier` object.

View products and product categories offered by loyalty partners

Use the new `LoyaltyPartnerProduct` object.

View loyalty processes in your organization

Use the new `LoyaltyProgram` object.

View currencies for a program

Use the new `LoyaltyProgramCurrency` object.

View the promotions used by a loyalty program member

Use the new `LoyaltyProgramMbrPromotion` object.

View information about loyalty program members

Use the new `LoyaltyProgramMember` object.

View partners associated with the loyalty program

Use the new `LoyaltyProgramPartner` object.

View tiers of a loyalty program

Use the new `LoyaltyTier` object.

Associate loyalty benefits with a tier

Use the new `LoyaltyTierBenefit` object.

View tier groups of a loyalty program

Use the new `LoyaltyTierGroup` object.

View benefits provided to a loyalty program member

Use the new `MemberBenefit` object.

Associate a loyalty program with an Experience Cloud Site

Use the new `NetworkReferencedObject` object.

View reasons available for the creation of a Journal

Use the new `JournalReason` object.

View transaction sub-types

Use the new `JournalSubType` object.

View transaction types

Use the new `JournalType` object.

View promotions associated with a loyalty program

Use the new `Promotion` object.

Associate promotions with loyalty partner products

Use the new `PromotionLoyaltyPtnrProdt` object.

Associate promotions with market segments

Use the new `PromotionMarketSegment` object.

View transactions of a loyalty program

Use the new `TransactionJournal` object.

View vouchers issued to a loyalty program member

Use the new `Voucher` object.

View vouchers associated with a loyalty program

Use the new `VoucherDefinition` object.

Loyalty Management Has New Metadata Types

Use the new metadata types for Loyalty Management.

Use invocable actions

The actionType on the the FlowActionCall subtype field of the Flow metadata type has new enumerated values for Loyalty Management.

- `adjustPoints`-Adjusts loyalty points for a specified program member or journal transaction.
- `assignTierBenefits`—Assign benefits to a loyalty program members based on their member's tier for benefits that are associated with a Benefit Action.
- `cancelAccrual`—Cancels a specific set of accrual transactions.
- `creditPoints`—Credits loyalty points to a specified program member's balance.
- `cancelRedemption`—Reverts a specific set of redemption transactions.
- `changeTier`—Changes the tier for a specified program member.
- `changeTierWhenNoErrors`—Changes the tier for a specified loyalty program member only when all the input parameters meet the criteria.
- `debitPoints`—Debits loyalty points to a specified program member's balance.
- `executeMemberBenefit`—Processes the benefit action associated with the benefit that is assigned to a loyalty program member.
- `getTier`—Gets the current tier for a specified program member.
- `getPointsBalance`—Gets the loyalty points balance for a specified program member.
- `issueVoucher`—Issues a voucher for a member or contract.

Apex: New Items

These methods and classes are new.

ConnectApi Namespace

The ConnectApi namespace has these new methods and classes.

Methods

This new method is in the `ConnectApi.LoyaltyConnect` class.

Get benefits for a member

```
getMemberBenefits(memberId)
```

This new method is in the `ConnectApi.LoyaltyVoucherConnect` class.

Redeem a voucher for a member

```
redeem(programName, membershipNumber, voucherCode)
```

Output Classes

These output classes are new.

ConnectApi.MemberBenefitsOutput

This new class has these properties.

- `memberBenefits`—List of all benefits available for a member.

`ConnectApi.MemberBenefitOutput`

This new class has these properties.

- `benefitId`—ID of the benefit available for the member.
- `benefitName`—The name of the benefit available for the member.
- `benefitTypeId`—ID of the associated benefit type record.
- `benefitTypeName`—The name of the associated benefit type.
- `createdRecordId`—ID of the record created during benefit assignment.
- `createdRecordName`—The display name of the record created during benefit assignment.
- `isActive`—Indicates whether the benefit is active.

Connect REST API

Loyalty Management REST API includes new calls.

Loyalty Management

Get loyalty benefits

Make a GET request to the new
`/services/data/vXX.X/connect/loyalty/member/${memberId}/memberbenefits` resource to get a list
of loyalty benefits available for a loyalty program member.

Redeem a voucher code

Make a POST request to the new
`/services/data/vXX.X/connect/loyalty/programs/${programName}/members/${membershipNumber}/`
`vouchers/{voucherCode}/redeem` resource to redeem a voucher code for a loyalty program member.

Loyalty Management Has New Invocable Actions

Use the new invocable actions for Loyalty Management.

Adjust loyalty points

Use the new `adjustPoints` standard action to adjust loyalty points for a specified program member or journal transaction.

Assign member tier benefits

Use the new `assignTierBenefits` standard action to assign benefits to a loyalty program members based on their member's
tier for benefits that are associated with a Benefit Action.

Cancel accrual transactions

Use the new `cancelAccrual` standard action to cancel a specific set of accrual transactions.

Credit loyalty points

Use the new `creditPoints` standard action to credit loyalty points to a specified program member's balance.

Change member tier

Use the new `changeTier` standard action to change the tier for a specified program member.

Change member tier when input parameters meet the criteria

Use the new `changeTierWhenNoErrors` standard action to change tier for a specified loyalty program member only when
all the input parameters meet the criteria.

Debit loyalty points

Use the new `debitPoints` standard action to debit loyalty points from a specified program member's balance.

Get loyalty points balance

Use the new `getPointsBalance` standard action to get the loyalty points balance for a specified program member.

Get member tier

Use the new `getTier` standard action to get the current tier for a specified program member.

Issue voucher

Use the new `issueVoucher` standard action to issue a voucher for a member or contract.

Process member benefits

Use the new `executeMemberBenefit` standard action to process the benefit action associated with the benefit that is assigned to a loyalty program member.

Revert redemption transactions

Use the new `cancelRedemption` standard action to revert a specific set of redemption transactions.

Batch Management

Process millions of records in your Salesforce org using Batch Management. Track the status and health of Batch Management jobs using Monitor Workflow Services (generally available).

IN THIS SECTION:

Define Jobs to Process Large Record Volumes

Create Batch Management jobs to process large volumes of data in a flow. Batch Management jobs process your data in manageable batches. Use Batch Management jobs to automate the execution of complex business processes across multiple objects. Batch Management jobs are scheduled using scheduled flows.

Schedule Your Jobs

Use scheduled flows to decide when and how frequently to run a Batch Management job. You can schedule jobs that you create or jobs that are available in your Salesforce org based on your org's licenses. You can use a scheduled flow to run multiple Batch Management jobs together.

Watch Your Batch Jobs

Monitor the status and the health of a Batch Management job run. Each time a job runs, a new record is created in Monitor Workflow Services. You can track the complete Batch Management job run and its batch job parts. You can also view the list of records that the batch job failed to process.

Share Your Batch Management Jobs

Batch Management jobs can be shared with other Salesforce orgs using change sets, managed packages, or unmanaged packages. Use change sets and packages to move jobs to your production Salesforce org or share them with your collaborators.

Batch Management Has a New Object

Do more with the new Batch Management objects.

Batch Management Has New Tooling API Objects

Use Tooling APIs to work with the Batch Management setup objects.

Batch Management Has a New Platform Event

Use a Platform Event to notify your subscribed users when Batch Management job runs in a flow are complete.

Batch Management Has a New Invocable Action

Run Batch Management jobs using an invocable action.

Batch Management Has New Metadata Types

Batch Management has a new metadata type and enumeration.

Monitor Workflow Services Has New Objects

You can now view the status and progress of Batch Management jobs using Monitor Workflow Services objects.

Define Jobs to Process Large Record Volumes

Create Batch Management jobs to process large volumes of data in a flow. Batch Management jobs process your data in manageable batches. Use Batch Management jobs to automate the execution of complex business processes across multiple objects. Batch Management jobs are scheduled using scheduled flows.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the System Administrator profile can create Batch Management 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, in the Quick Find box, enter `Batch Management`, and then select **Batch Management**. Click **New**. Define a Batch Management job and select the business flow for the Batch Management job to process. 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**.

SEE ALSO:

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

Loyalty Management Developer Guide: Batch Management Metadata API (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Batch Management Metadata API (can be outdated or unavailable during release preview)

Schedule Your Jobs

Use scheduled flows to decide when and how frequently to run a Batch Management job. You can schedule jobs that you create or jobs that are available in your Salesforce org based on your org's licenses. You can use a scheduled flow to run multiple Batch Management jobs together.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the Manage Flow permission can run Batch Management jobs in Flows.

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.

SEE ALSO:

   Salesforce Help: Schedule a Batch Job (can be outdated or unavailable during release preview)

   Loyalty Management Developer Guide: Batch Management Invocable Actions (can be outdated or unavailable during release preview)

   Rebate Management Developer Guide: Batch Management Invocable Actions (can be outdated or unavailable during release preview)

Watch Your Batch Jobs

Monitor the status and the health of a Batch Management job run. Each time a job runs, a new record is created in Monitor Workflow Services. You can track the complete Batch Management job run and its batch job parts. You can also view the list of records that the batch job failed to process.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the System Administrator profile can monitor Batch Management job runs using Monitor Workflow Services.

How: From Setup, in the Quick Find box, enter `Monitor Workflow Services`, and then select **Monitor Workflow Services**. To view the details of a Batch Management job run, click its record.

SEE ALSO:

> *Salesforce Help*: Monitor Your Batch Jobs (can be outdated or unavailable during release preview)

Share Your Batch Management Jobs

Batch Management jobs can be shared with other Salesforce orgs using change sets, managed packages, or unmanaged packages. Use change sets and packages to move jobs to your production Salesforce org or share them with your collaborators.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Batch Management Has a New Object

Do more with the new Batch Management objects.

View Batch Management jobs, including jobs that are available in your Salesforce org based on specific Industries licenses

> Use the new `BatchProcessJobDefinitionView` object.

SEE ALSO:

> *Loyalty Management Developer Guide*: Batch Management Standard Objects (can be outdated or unavailable during release preview)
> *Rebate Management Developer Guide*: Batch Management Standard Objects (can be outdated or unavailable during release preview)

Batch Management Has New Tooling API Objects

Use Tooling APIs to work with the Batch Management setup objects.

View the details of a Batch Management job

> Use the new `BatchProcessJobDefinition` object.

View a Batch Management job

> Use the new `BatchJobDefinition` object. Data Processing Engine also uses this object.

SEE ALSO:

> *Loyalty Management Developer Guide*: Batch Management Setup Objects (can be outdated or unavailable during release preview)
> *Rebate Management Developer Guide*: Batch Management Setup Objects (can be outdated or unavailable during release preview)

Batch Management Has a New Platform Event

Use a Platform Event to notify your subscribed users when Batch Management job runs in a flow are complete.

Be notified when a Batch Management job run in a flow is complete

Subscribe to the new `BatchJobStatusChangedEvent` for real-time notifications.

SEE ALSO:

Loyalty Management Developer Guide: BatchJobStatusChangedEvent Object (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: BatchJobStatusChangedEvent Object (can be outdated or unavailable during release preview)

Batch Management Has a New Invocable Action

Run Batch Management jobs using an invocable action.

Run a Batch Management job

Use the new `batchJobAction` custom action to create batch jobs and process data.

SEE ALSO:

Loyalty Management Developer Guide: Batch Management Invocable Actions (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Batch Management Invocable Actions (can be outdated or unavailable during release preview)

Batch Management Has New Metadata Types

Batch Management has a new metadata type and enumeration.

Define Batch Management jobs to process data

Use the new `BatchProcessJobDefinition` metadata type.

Use the Batch Management job action with Flows

Use the new `batchJobAction` enumeration value on the actionType on the FlowActionCall subtype field of the Flow metadata type.

SEE ALSO:

Loyalty Management Developer Guide: Batch Management Metadata API (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Batch Management Metadata API (can be outdated or unavailable during release preview)

Monitor Workflow Services Has New Objects

You can now view the status and progress of Batch Management jobs using Monitor Workflow Services objects.

View a Batch Management job run

Use the new `BatchJob` object.

View a Batch Management job part

Use the new `BatchJobPart` object.

View the records that weren't processed in a part of a Batch Management job run

Use the new `BatchDataPartFailedRecord` object.

SEE ALSO:

Loyalty Management Developer Guide: Monitor Workflow Services (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Monitor Workflow Services (can be outdated or unavailable during release preview)

Decision Tables

Decision tables read business rules and deliver outcomes for business scenarios. For example, you can define multiple business rules for product discount and create a decision table that evaluates products against the rules to calculate discounts for each product. Use a decision table in a flow to get outcomes on schedule or when required (generally available).

IN THIS SECTION:

Define Your Business Rules

Create business rules that guide your business decisions. For a decision table to read the business rules, create the rules as records for a standard object, a custom object, or a custom metadata type.

Specify the Rules and Automate the Rest

Automate decision-making to find solutions faster. Make a few simple selections to get a decision table ready to process records, evaluate rules, and provide outcomes. Select the object or the custom metadata type containing the rules, the input fields, and the output fields. A decision table can read up to 100,000 business rules and provide an outcome.

Determine the Outcome for Records from Multiple Sources

A set of business rules can apply to one or more areas of an organization. Use dataset links in a decision table to define the object records it evaluates. In a dataset link, map the input fields of the decision table with the object fields that it evaluates.

Invoke a Decision Table from a Flow

You can invoke a decision table in a flow on a schedule or when required. You can choose to invoke a decision table and provide details of what to evaluate. Or, you can invoke a decision table to provide outcomes for an associated dataset link object.

Update Your Business Rules Anytime

The rules that govern your business decisions evolve and change. If you modify or add a business rule, refresh the related decision table to ensure that it provides outcomes based on the updated rules.

Share Decision Tables

Test and fine-tune decision tables before deploying them in your production Salesforce org. You can use change sets, managed packages, or unmanaged packages to share decision tables with other Salesforce orgs

Keep Your Business Rules Safe

Use Salesforce Shield encrypted objects to store your business rules. Decision tables can read input and output fields of business rules from Salesforce Shield encrypted objects and provide outcomes.

Decision Table Has New Objects

Use Tooling APIs to work with the Decision Table setup objects.

Apex: New Items

These methods and classes are new.

Connect REST API

Decision Table REST API includes enhanced calls.

Decision Table Has New Invocable Actions

Run or refresh decision tables using invocable actions.

Decision Table Has New Metadata Types

Decision table has a new metadata type and enumeration.

Define Your Business Rules

Create business rules that guide your business decisions. For a decision table to read the business rules, create the rules as records for a standard object, a custom object, or a custom metadata type.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Why: For example, a sportswear seller can have various discount rules based on brand, price, or product category. You can add the rules in an object or custom metadata type. For example, to determine the discount for a brand of sport shoes, the decision table evaluates that product's record against the business rules and provides the discount as the outcome.

How: To incorporate business rules in your Salesforce org:

- Add the rules to a standard object.
- Create a custom object and add the rules to it.
- Create a custom metadata type and add the rules to it.

Product Discount Rule
All ▾ 📌

5 items • Sorted by Product Family • Filtered by All product discount rule • Updated a few seconds ago

		Product Discount Rules Name ⌄	Product Family ↑ ⌄	Brand ⌄	Lowest Price Point ⌄	Highest Price Point ⌄	Discount ⌄
1	☐	5% discount on Cloud Kicks sneakers below $500	Sneakers	Cloud Kicks	0	500	5%
2	☐	8% discount on Cloud Kicks sneakers between $501 and $1,500	Sneakers	Cloud Kicks	501	1,500	8%
3	☐	15% discount on regular Acme Running athletic shorts	Athletic Shorts	Acme Running	51	80	15%
4	☐	10% discount on premium Acme Running athletic shorts	Athletic Shorts	Acme Running	30	50	10%
5	☐	5% discount on Acme Running sporting accessories	Sporting Accessories	Acme Running	60	100	5%

SEE ALSO:

Salesforce Help: Business Rules (can be outdated or unavailable during release preview)

Specify the Rules and Automate the Rest
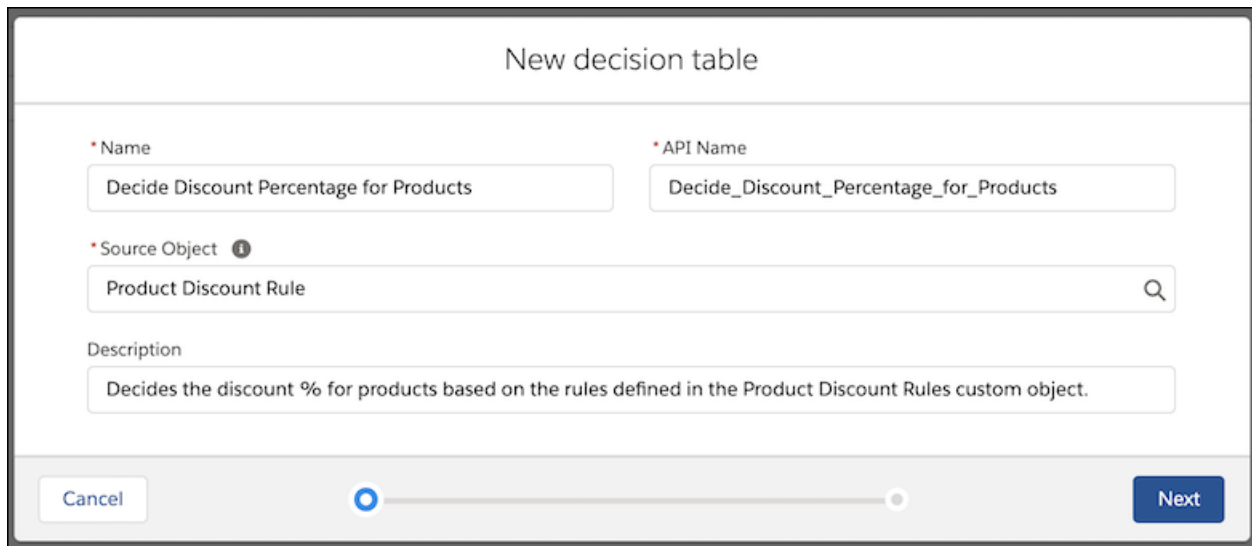
Automate decision-making to find solutions faster. Make a few simple selections to get a decision table ready to process records, evaluate rules, and provide outcomes. Select the object or the custom metadata type containing the rules, the input fields, and the output fields. A decision table can read up to 100,000 business rules and provide an outcome.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Decision Table is available to users with the System Administrator profile. You can provide permissions to other users by assigning them permissions to the Decision Table objects.

Why: Organizations can struggle to automate everyday processes such as choosing the discount percentage for a product or the care plan for a patient. Even with rules in place, finding the best possible outcome can be complex and time-consuming. Decision tables eliminate this manual task and automate the process.

How: From Setup, in the Quick Find box, enter `Decision Table`, and then select **Decision Table**. Click **New**. Name your decision table and select the source object or the custom metadata type that contains the business rules. Click **Next**. Select at least one input field, its operator, and one output field. The input fields represent the object or custom metadata type fields that must be compared to fields of the target record for which the decision table must provide an outcome. The output fields contain the values that the decision table must provide as outcomes when a rule is matched. Click **Save**, and then **Activate**.

SEE ALSO:

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

    Loyalty Management Developer Guide: Decision Table Setup Objects (can be outdated or unavailable during release preview)

    Loyalty Management Developer Guide: DecisionTable Metadata API (can be outdated or unavailable during release preview)

    Rebate Management Developer Guide: Decision Table Setup Objects (can be outdated or unavailable during release preview)

    Rebate Management Developer Guide: DecisionTable Metadata API (can be outdated or unavailable during release preview)

Determine the Outcome for Records from Multiple Sources

A set of business rules can apply to one or more areas of an organization. Use dataset links in a decision table to define the object records it evaluates. In a dataset link, map the input fields of the decision table with the object fields that it evaluates.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Decision Table is available to users assigned the System Administrator profile. You can also provide permissions to other users by assigning them permissions to the Decision Table objects.

Why: You can use different objects to store product records for different product lines. You can base the discount percentage for different product lines on the same business rules. You select each product line's object as a dataset link in your decision table.

How: Open the decision table to which you want to add a dataset link. On the Dataset Link card, click **New**. Enter the details of the dataset link, and select the object that contains the records that the decision table must evaluate. Map the decision table input fields with the fields of the source object selected in the dataset link. Click **Save**.

Salesforce Help: Add Dataset Links to Your Decision Table (can be outdated or unavailable during release preview)

Invoke a Decision Table from a Flow

You can invoke a decision table in a flow on a schedule or when required. You can choose to invoke a decision table and provide details of what to evaluate. Or, you can invoke a decision table to provide outcomes for an associated dataset link object.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: To run a decision table in Flows, the profile or the permission set assigned to the user must have the Run Decision Tables user permission enabled. The user must also have access to the Decision Table objects.

How: In a flow, drag the **Action** element on to the canvas. Select the Category as **Decision Table**. Search for the decision table that you want to invoke. If your decision table has associated dataset links, multiple search results appear. To invoke a decision table and specify your own input values, select the search result that contains the decision table name suffixed with Default (1). To get outcomes for records of an associated dataset link, select a search result that's suffixed with the name of an associated dataset link (2).

SEE ALSO:

Salesforce Help: Invoke a Decision Table (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: Decision Table Execution (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: Decision Table Actions (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Decision Table Execution (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Decision Table Actions (can be outdated or unavailable during release preview)

Update Your Business Rules Anytime

The rules that govern your business decisions evolve and change. If you modify or add a business rule, refresh the related decision table to ensure that it provides outcomes based on the updated rules.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Decision Table is available to users with the System Administrator profile. You can provide permissions to other users by assigning them permissions to the Decision Table objects.

How: Open a decision table and click **Refresh**. You can also refresh decision tables by using the **Refresh Decision Table** action in Flows based on a specific schedule or when required.

SEE ALSO:

Salesforce Help: Refresh a Decision Table (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: Decision Table Refresh Action (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Decision Table Refresh Action (can be outdated or unavailable during release preview)

Share Decision Tables

Test and fine-tune decision tables before deploying them in your production Salesforce org. You can use change sets, managed packages, or unmanaged packages to share decision tables with other Salesforce orgs

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Keep Your Business Rules Safe

Use Salesforce Shield encrypted objects to store your business rules. Decision tables can read input and output fields of business rules from Salesforce Shield encrypted objects and provide outcomes.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Decision Table Has New Objects

Use Tooling APIs to work with the Decision Table setup objects.

Create a decision table

Use the new `DecisionTable` object.

Create a dataset link for a decision table

Use the new `DecisionTableDatasetLink` object.

Define a decision table's input and outcome fields

Use the new `DecisionTableParameter` object.

Map a decision table parameter with a field from the object selected as the dataset link

Use the new `DecisionTblDatasetParameter` object.

SEE ALSO:

Loyalty Management Developer Guide: Decision Table Setup Objects (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Decision Table Setup Objects (can be outdated or unavailable during release preview)

Apex: New Items

These methods and classes are new.

ConnectApi Namespace

The ConnectApi namespace has these new methods and classes.

Methods

This new method is in the `ConnectApi.DecisionTable` class.

Execute a decision table

`execute(decisionTableId, DecisionTableInput)`

Input Classes

ConnectApi.DecisionTableInput

This new class has these properties.

- `conditions`—List of decision table conditions on which the decision table executes.
- `datasetLinkName`—The API name of the dataset link provided as an input for the decision table execution.

`ConnectApi.DecisionTableInputCondition`

This new class has these properties.

- `fieldName`—The field name that is selected as an input for the decision table.
- `operator`—The operator used for the input field.
- `value`—The value of the data type that is selected as an input.

Output Classes

`ConnectApi.DecisionTableOutcomeItem`

This new class has this property.

- `values`—The object configured with the list of outcome in decision table.

SEE ALSO:

>*Loyalty Management Developer Guide*: DecisionTable Methods (can be outdated or unavailable during release preview)
>
>*Rebate Management Developer Guide*: DecisionTable Methods (can be outdated or unavailable during release preview)

Connect REST API

Decision Table REST API includes enhanced calls.

Decision Table

Execute an active decision table

Make a POST request to the new `connect/decision-table/${decisionTableId}` resource with the new Decision Table Input request body.

SEE ALSO:

>*Loyalty Management Developer Guide*: Decision Table APIs (can be outdated or unavailable during release preview)
>
>*Rebate Management Developer Guide*: Decision Table APIs (can be outdated or unavailable during release preview)

Decision Table Has New Invocable Actions

Run or refresh decision tables using invocable actions.

Refresh a decision table cache

Use the new `refreshDecisionTable` standard action to refresh the decision table cache.

Run a decision table

Use the new `decisionTableAction` custom action to run a decision table definition.

SEE ALSO:

>*Loyalty Management Developer Guide*: Decision Table Invocable Actions (can be outdated or unavailable during release preview)
>
>*Rebate Management Developer Guide*: Decision Table Invocable Actions (can be outdated or unavailable during release preview)

Decision Table Has New Metadata Types

Decision table has a new metadata type and enumeration.

Create decision table rules to process records

Use the new `DecisionTable` metadata type.

Define mapping definition for a decision table

Use the new `DecisionTableDatasetLink` metadata type.

Work with decision tables in flows

The actionType field on the FlowAction Call subtype of the Flow metadata type has new enumeration values.

- `decisionTableAction`—Work with decision table actions.
- `decisionTableRefreshAction`—Work with decision table refresh actions.

SEE ALSO:

Loyalty Management Developer Guide: Decision Table Metadata API (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Decision Table Metadata API (can be outdated or unavailable during release preview)

Data Processing Engine

Extract data from standard objects and custom objects in your Salesforce org and transform it based on your business requirements. Then create, update, or upsert records with the transformed data (generally available).

IN THIS SECTION:

Transform Data with a Few Clicks

Data in your Salesforce org is stored across different objects. Use Data Processing Engine to gather data stored across different objects and then transform it. Create a Data Processing Engine definition. Then select data sources, define the required transformations, and choose whether you want to use the transformed data to create, upsert, or update records.

Provide Your Own Inputs While Transforming Data

You can run a Data Processing Engine definition to gather results for different bussiness scenarios. Input variables let you specify values that are used in Filter and Formula type nodes. You can either define the value of an input variable within the Data Processing Engine definition or when running the definition in Flows.

Run Data Processing Engine on Your Terms

Run a Data Processing Engine definition to create, update, or upsert records in your Salesforce org on a schedule or when needed. You can run a definition after it's activated. Use a flow to define when and how frequently a Data Processing Engine definition updates your org's data.

Track Your Data Processing Engine Runs

Use a tracking record to get the details of a Data Processing Engine definition run. Every time a Data Processing Engine definition transforms and updates data, a tracking record is created in Monitor Workflow Services.

Write Back Results to Salesforce Shield Encrypted Fields

Keep the data that you write back to object fields safe. After the results are written back to a Salesforce Shield encrypted field, the field doesn't lose encryption.

Save Time with Template Data Processing Engine Definitions

Your users or collaborators can make a copy of template definitions and customize them for their business requirements. Partners and independent software vendors (ISV) can create template definitions and share them with their customers. Template definitions are read-only.

Share Data Processing Engine Definitions with Other Orgs

After you create and test a Data Processing Engine definition in your sandbox org, use change sets or managed or unmanaged packages to deploy the definition in your production Salesforce org. You can use change sets or packages to share definitions with your collaborators who can deploy and use the definition in their orgs.

Track Your Data Processing Engine Usage

Monitor the amount of data that's processed in your Salesforce org by Data Processing Engine definitions and the data that's written back to Salesforce objects. Ensure that your org stays within Data Processing Engine limits.

Data Processing Engine Has New Objects

Do more with the new Data Processing Engine objects.

Data Processing Engine Has New Tooling API Objects

Use Tooling APIs to work with the Data Processing Engine setup objects.

Data Processing Engine Has a New Invocable Action

Run Data Processing Engine definitions using an invocable action.

Data Processing Engine Has New Metadata Types

Data Processing Engine has a new metadata type and enumeration.

Data Processing Engine Has a New Platform Event

Use a Platform Event to notify your subscribed users when Data Processing Engine job runs in a flow are complete.

Monitor Workflow Services Has New Objects

You can now view the status and progress of Data Processing Eninge definitions using Monitor Workflow Services objects.

Transform Data with a Few Clicks

Data in your Salesforce org is stored across different objects. Use Data Processing Engine to gather data stored across different objects and then transform it. Create a Data Processing Engine definition. Then select data sources, define the required transformations, and choose whether you want to use the transformed data to create, upsert, or update records.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Users with the Modify All Data and Customize Application permissions can create Data Processing Engine definitions.

How: From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**. Click **New**. Configure your Data Processing Engine definition and activate it.

Here's how you can select data sources, transform your data, and write back the results:

- Data Source: Select objects, fields, and related object fields that you want to use as data sources.
- Join: Join results from two nodes and decide the join type.
- Filter: Filter data from a node.
- Append: Create a union of nodes.
- Formula: Use the data from a node to create a formula.
- Group and Aggregate: Group and aggregate data based on fields from a node.
- Slice: Drop fields that you no longer require for processing in subsequent nodes.
- Writeback Object: Select the object fields and related object fields to write back the transformed results to.

Salesforce Help: Create a Data Processing Engine Definition (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: Data Processing Engine Metadata API (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Data Processing Engine Metadata API (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: BatchCalcJobDefinition (can be outdated or unavailable during release preview)

Provide Your Own Inputs While Transforming Data

You can run a Data Processing Engine definition to gather results for different bussiness scenarios. Input variables let you specify values that are used in Filter and Formula type nodes. You can either define the value of an input variable within the Data Processing Engine definition or when running the definition in Flows.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Users with the Modify All Data and Customize Application permissions can create Data Processing Engine definitions.

Why: For example, you can use a Data Processing Engine definition to transform data for customers from a city or for customers from different cities. For a single city, create an input variable and specify the name of the city as the value in the definition. To transform data for customers from different cities, every time you run the definition for a city in Flows, specify the city's name.

How: In the Data Processing Engine builder, on the **Input Variables** tab, click **New Input Variable**. Enter a name for the input variable and select a type. You can choose to add a value for the input variable. For a Text type input variable, you can enter a comma-separated list of values.

SEE ALSO:

Salesforce Help: Input Variables (can be outdated or unavailable during release preview)

Run Data Processing Engine on Your Terms

Run a Data Processing Engine definition to create, update, or upsert records in your Salesforce org on a schedule or when needed. You can run a definition after it's activated. Use a flow to define when and how frequently a Data Processing Engine definition updates your org's data.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Users with the Manage Flow permission can run Data Processing Engine definitions in Flows.

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 definition.

SEE ALSO:

Salesforce Help: Run a Data Processing Engine Definition (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Track Your Data Processing Engine Runs

Use a tracking record to get the details of a Data Processing Engine definition run. Every time a Data Processing Engine definition transforms and updates data, a tracking record is created in Monitor Workflow Services.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Users with the Modify All Data and Customize Application permissions can access Monitor Workflow Services.

How: In Setup, search for and select **Monitor Workflow Services**. To view the details of a Data Processing Engine definition's run, open the corresponding record.

SEE ALSO:

   Salesforce Help: Monitor Your Data Processing Engine Definitions (can be outdated or unavailable during release preview)

Write Back Results to Salesforce Shield Encrypted Fields

Keep the data that you write back to object fields safe. After the results are written back to a Salesforce Shield encrypted field, the field doesn't lose encryption.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Save Time with Template Data Processing Engine Definitions

Your users or collaborators can make a copy of template definitions and customize them for their business requirements. Partners and independent software vendors (ISV) can create template definitions and share them with their customers. Template definitions are read-only.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Users with the Modify All Data and Customize Application permissions can create template Data Processing Engine definitions.

How: In the New data processing engine definition window, select **Use this data processing engine as a template?**

SEE ALSO:

> *Salesforce Help*: Data Processing Engine Builder (can be outdated or unavailable during release preview)

Share Data Processing Engine Definitions with Other Orgs

After you create and test a Data Processing Engine definition in your sandbox org, use change sets or managed or unmanaged packages to deploy the definition in your production Salesforce org. You can use change sets or packages to share definitions with your collaborators who can deploy and use the definition in their orgs.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Track Your Data Processing Engine Usage

Monitor the amount of data that's processed in your Salesforce org by Data Processing Engine definitions and the data that's written back to Salesforce objects. Ensure that your org stays within Data Processing Engine limits.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Rebate Management, or Loyalty Management is enabled. The Salesforce org must have Data Pipelines enabled.

Who: Admins with the Data Pipelines Base User permission set can view Data Processing Engine usage.

How: From Setup, in the Quick Find box, enter `Data Pipelines`, then select **Data Pipelines**. Click **Get Started**. You can view your usage for the day and for the org.
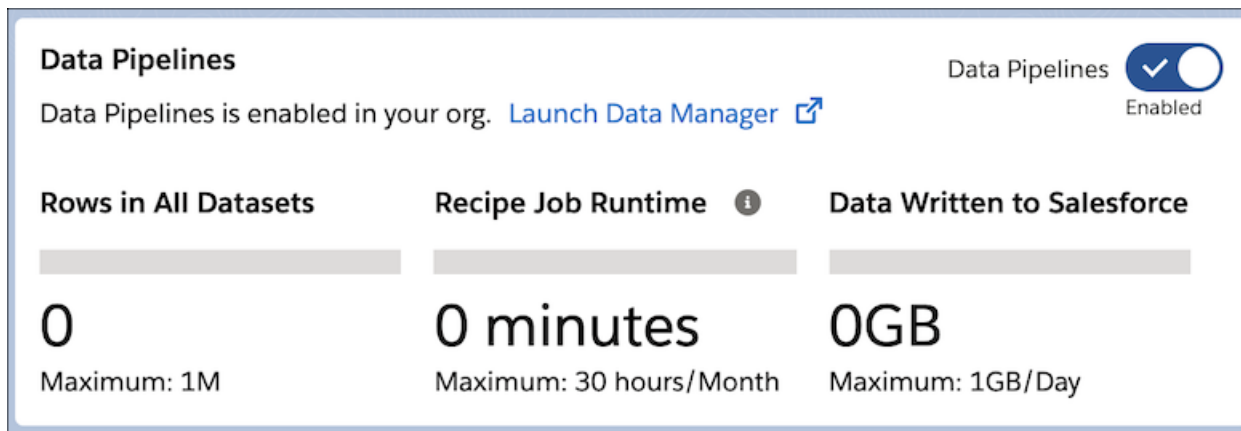
SEE ALSO:

> *Salesforce Help*: Data Processing Engine Limits (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Track Your Data Processing Engine Usage (can be outdated or unavailable during release preview)

Data Processing Engine Has New Objects

Do more with the new Data Processing Engine objects.

View Data Processing Engine definitions, including definitions that are available in your Salesforce org based on specific Industries licenses

> Use the new `BatchCalcJobDefinitionView` object.

SEE ALSO:

> *Loyalty Management Developer Guide*: Data Processing Engine Standard Object (can be outdated or unavailable during release preview)
>
> *Rebate Management Developer Guide*: Data Processing Engine Standard Object (can be outdated or unavailable during release preview)
>
> *Financial Services Cloud Developer Guide*: BatchCalcJobDefinitionView (can be outdated or unavailable during release preview)

Data Processing Engine Has New Tooling API Objects

Use Tooling APIs to work with the Data Processing Engine setup objects.

View a Data Processing Engine definition

> Use the new `BatchCalcJobDefinition` object.

View a Data Processing Engine definition job

> Use the new `BatchJobDefinition` object. Batch Management also uses this object

SEE ALSO:

> *Loyalty Management Developer Guide*: Data Processing Engine Setup Object (can be outdated or unavailable during release preview)
>
> *Rebate Management Developer Guide*: Data Processing Engine Setup Object (can be outdated or unavailable during release preview)
>
> *Financial Services Cloud Developer Guide*: BatchCalcJobDefinition (can be outdated or unavailable during release preview)

Data Processing Engine Has a New Invocable Action

Run Data Processing Engine definitions using an invocable action.

Run a Data Processing Engine definition
Use the new `dataProcessingEngineAction` custom action to transform data based on your requirements.

SEE ALSO:

Loyalty Management Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: Data Processing Engine Invocable Actions (can be outdated or unavailable during release preview)

Data Processing Engine Has New Metadata Types

Data Processing Engine has a new metadata type and enumeration.

Transform data with a Data Processing Engine definition
Use the new `BatchCalcJobDefinition` metadata type.

Use the Data Processing Engine definition action with Flows
Use the new `dataProcessingEngineAction` enumeration value on the actionType on the FlowActionCall subtype field of the Flow metadata type.

SEE ALSO:

Loyalty Management Developer Guide: Data Processing Engine Metadata API (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Data Processing Engine Metadata API (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: BatchCalcJobDefinition (can be outdated or unavailable during release preview)

Data Processing Engine Has a New Platform Event

Use a Platform Event to notify your subscribed users when Data Processing Engine job runs in a flow are complete.

Be notified when a Data Processing Engine definition run in a flow is complete.
Subscribe to the new `BatchJobStatusChangedEvent` for real-time notifications.

SEE ALSO:

Loyalty Management Developer Guide: BatchJobStatusChangedEvent Object (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: BatchJobStatusChangedEvent Object (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: BatchJobStatusChangedEvent Object (can be outdated or unavailable during release preview)

Monitor Workflow Services Has New Objects

You can now view the status and progress of Data Processing Eninge definitions using Monitor Workflow Services objects.

View a Data Processing Engine definition run

Use the new `BatchJob` object.

View a Data Processing Engine definition part

Use the new `BatchJobPart` object.

View the records that weren't processed in a part of a Data Processing Engine definition

Use the new `BatchDataPartFailedRecord` object.

SEE ALSO:

Loyalty Management Developer Guide: Monitor Workflow Services (can be outdated or unavailable during release preview)

Rebate Management Developer Guide: Monitor Workflow Services (can be outdated or unavailable during release preview)

Financial Services Cloud Developer Guide: Monitor Workflow Services (can be outdated or unavailable during release preview)

Manufacturing Cloud

Manage sales agreements easily with new features and enhancements. Convert quotes and opportunities directly to easily trackable sales agreements using a new Connect API resource. Manage account forecasts better with an option to consider opportunity schedules in forecasting. Delete existing sales agreements to cater to changed requirements.

IN THIS SECTION:

Introducing the Customer 360 Guide for Discrete Manufacturing

Explore the power of multicloud solutions to unite marketing, Omni-Channel selling, and service to deliver connected experiences.

Convert Quotes and Opportunities to Sales Agreements

Your account managers can now convert quotes or opportunities directly to sales agreements using the new Sales Agreements Connect REST API. The Connect API allows them to automatically convert a quote or an opportunity to a sales agreement to ensure accuracy.

Consider Opportunity Schedules in Account Forecasting

Compute accurate forecast calculations based on opportunity quantity and revenue schedules using opportunity schedules in account forecasting.

Unclutter Your Sales Agreements List

With the new Delete Sales Agreements permission added to the Manufacturing Sales Agreements permission set, account managers can remove any active, approved, expired, or canceled sales agreements to cater to changed requirements. Previously, your users could delete sales agreements in draft state only.

New Manufacturing Cloud Metadata Type

Do more with this new Manufacturing Cloud metadata type.

Connect REST API

Manufacturing Cloud REST API includes a new call.

Introducing the Customer 360 Guide for Discrete Manufacturing

Explore the power of multicloud solutions to unite marketing, Omni-Channel selling, and service to deliver connected experiences.

Why: This Customer 360 Guide explores Salesforce cross-cloud architecture for discrete manufacturers. The assets in this Customer 360 Guide help you build the future of your manufacturing business and implement changes to fully realize your digital transformation. The

guide brings together assets for c-suite executives, line-of-business leaders, architects, and developers to drive digital transformation and engage with partners. The guide includes five complete solution kits.

IN THIS SECTION:

[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 and configurations.

SEE ALSO:

[Customer 360 Guide for Discrete Manufacturing](#)

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 and configurations.

IN THIS SECTION:

[Offer Buy Online, Pick Up in Store (BOPIS)](#)

Enable shoppers to buy products online for local store pickup through a Salesforce B2C Commerce storefront.

[Streamline Manufacturing Reorders](#)

Enhance the reorder experience using the negotiated Sales Agreement object in Manufacturing Cloud.

[Take on B2B and B2C Marketing with Pardot and Journey Builder](#)

Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multichannel messaging, journeys, and transactional messaging.

[Synchronize Product and Pricing Data](#)

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

[Link Cart to Quote](#)

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

[Link Cart to Cash](#)

Connect B2B Commerce with CPQ billing and order information to synchronize transactions, connect data flows, and collect transaction data across clouds.

Offer Buy Online, Pick Up in Store (BOPIS)

Enable shoppers to buy products online for local store pickup through a Salesforce B2C Commerce storefront.

How: To check out the complete solution kit, see Salesforce Help: [Offer Buy Online, Pick Up in Store (BOPIS)](#).

Streamline Manufacturing Reorders

Enhance the reorder experience using the negotiated Sales Agreement object in Manufacturing Cloud.

How: To check out the complete solution kit, see Salesforce Help: [Streamline Manufacturing Reorders](#).

Take on B2B and B2C Marketing with Pardot and Journey Builder

Execute B2B (considered purchase) and B2C (transactional purchase) marketing initiatives across your business units using features like lead scoring, Salesforce integration, multichannel messaging, journeys, and transactional messaging.

How: To check out the complete solution kit, see Salesforce Help: Take on B2B and B2C Marketing with Pardot and Journey Builder.

Synchronize Product and Pricing Data

Establish a single source of truth for products and pricing data in CPQ and B2B Commerce.

How: To check out the complete solution kit, see Salesforce Help: Synchronize Product and Pricing Data.

Link Cart to Quote

Integrate B2B Commerce carts with CPQ to allow sales representatives to finalize quotes and customers to complete orders.

How: To check out the complete solution kit, see Salesforce Help: Link Cart to Quote.

Link Cart to Cash

Connect B2B Commerce with CPQ billing and order information to synchronize transactions, connect data flows, and collect transaction data across clouds.

How: To check out the complete solution kit, see Salesforce Help: Link Cart to Cash.

Convert Quotes and Opportunities to Sales Agreements

Your account managers can now convert quotes or opportunities directly to sales agreements using the new Sales Agreements Connect REST API. The Connect API allows them to automatically convert a quote or an opportunity to a sales agreement to ensure accuracy.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Manufacturing Sales Agreements permission set.

How: Use the new `ConvertToSalesAgreement` usage type available in ObjectHierarchyRelationship settings to map an input object (quote or opportunity) to an output object (sales agreement) and define field mappings. Then use the Sales Agreements Connect API to create a sales agreement from an instance of input object.

Consider Opportunity Schedules in Account Forecasting

Compute accurate forecast calculations based on opportunity quantity and revenue schedules using opportunity schedules in account forecasting.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Manufacturing Account Forecasting permission set.

How: In Setup, enter `Manufacturing` in the Quick Find box, and then select **Account Forecasting**. In the Account Forecast Calculation Settings section, enable Opportunity Product Schedules.

Unclutter Your Sales Agreements List

With the new Delete Sales Agreements permission added to the Manufacturing Sales Agreements permission set, account managers can remove any active, approved, expired, or canceled sales agreements to cater to changed requirements. Previously, your users could delete sales agreements in draft state only.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available to users with the Manufacturing Sales Agreements permission set.

How: Delete Sales Agreements is a general user permission that can be assigned to a profile.

SEE ALSO:

    Bring Predictability to Your Business:: Delete Sales Agreements

New Manufacturing Cloud Metadata Type

Do more with this new Manufacturing Cloud metadata type.

Represents the mapping between an input object and an output object. It also maps the child objects of the parent input and output object
    Use the new ObjectHierarchyRelationship metadata type.

Connect REST API

Manufacturing Cloud REST API includes a new call.

Manufacturing Cloud

Create a sales agreement from an external source

Make a POST request to the `/services/data/vXX.X/connect/manufacturing/sales-agreements` resource with the new Sales Agreement Input request body.

Rebate Management

Run volume-, revenue-, and growth-based rebate programs with Rebate Management. Build long-lasting channel relationships through transparent and mutually profitable incentives. Create rebate programs and specify the type of rebate, eligibility rules, and benefit structure, including thresholds. Calculate payouts in context by working with your partners, and analyze payout information at the end of term or anytime. Rebate payouts are processed at the cadence you select with the detail you want. Use the Manufacturing Experience Cloud template to create a site and collaborate with your partners. Get actionable insights on your rebates with Einstein Analytics for Rebates (generally available).

IN THIS SECTION:

Define Rebate Programs to Easily Calculate Rebate Amounts

Set up volume-, revenue-, and growth-based rebate programs with automated payout calculations. Optimize the incentives offered with the right mix of discounts and rebates to build a mutually profitable relationship. Seamlessly integrate your Salesforce accounts with rebate programs by enrolling accounts as members in eligible programs.

Gain New Insights with Enhanced Rebate Processing

Define the payout calculation criteria based on amount per unit, percent of revenue, or fixed amount (lump sum). Add product-based eligibility and tiers with thresholds to your rebates. Customize the calculation process using the flexible and extensible back-end process. Accrue and calculate payouts as transactions are received. Transactions can be in the form of orders, invoices, claims, or any other rebate data source. Track rebate payouts by date and status, perform an audit, and approve payouts. Calculate payouts just in time or at the end of a period.

Increase Sales and Partner Collaboration on Rebates

Provide up-to-date incentive program accrual and payout information to your sales teams and partners. Collaborate with your partners using the Manufacturing Experience Cloud site template. Drive the right partner behaviors with intelligent and prescriptive program and payout performance insights. Partners can upload their transactions and view payouts using the Payouts menu.

Analyze Rebate Programs and Boost Your Business with Rebate Analytics

Use Rebate Analytics dashboards to get actionable insights into rebate programs that help you fine-tune programs, achieve business goals, and boost product sales. You can configure the app to get out-of-the-box analytics for your custom incentive programs. The embedded dashboards give you immediate insights into incentives for your orders, sales agreement products, and rebate programs from Salesforce pages you use everyday. Use the pre-configured Einstein Discovery story to identify factors affecting profitability and improve it.

Define Rebate Programs to Easily Calculate Rebate Amounts

Set up volume-, revenue-, and growth-based rebate programs with automated payout calculations. Optimize the incentives offered with the right mix of discounts and rebates to build a mutually profitable relationship. Seamlessly integrate your Salesforce accounts with rebate programs by enrolling accounts as members in eligible programs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

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 rebate type records.

Gain New Insights with Enhanced Rebate Processing

Define the payout calculation criteria based on amount per unit, percent of revenue, or fixed amount (lump sum). Add product-based eligibility and tiers with thresholds to your rebates. Customize the calculation process using the flexible and extensible back-end process. Accrue and calculate payouts as transactions are received. Transactions can be in the form of orders, invoices, claims, or any other rebate data source. Track rebate payouts by date and status, perform an audit, and approve payouts. Calculate payouts just in time or at the end of a period.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: View the payout details in the Payout tab of rebate program member records.

SEE ALSO:

Create and Manage Your Rebate Programs: View Program Member Payout Details

Increase Sales and Partner Collaboration on Rebates

Provide up-to-date incentive program accrual and payout information to your sales teams and partners. Collaborate with your partners using the Manufacturing Experience Cloud site template. Drive the right partner behaviors with intelligent and prescriptive program and payout performance insights. Partners can upload their transactions and view payouts using the Payouts menu.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: Use Rebates objects in the Manufacturing partner Experience Cloud site.

Partners can upload their rebate transactions and view approved payouts.

Analyze Rebate Programs and Boost Your Business with Rebate Analytics

Use Rebate Analytics dashboards to get actionable insights into rebate programs that help you fine-tune programs, achieve business goals, and boost product sales. You can configure the app to get out-of-the-box analytics for your custom incentive programs. The embedded dashboards give you immediate insights into incentives for your orders, sales agreement products, and rebate programs from Salesforce pages you use everyday. Use the pre-configured Einstein Discovery story to identify factors affecting profitability and improve it.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and all versions of the Salesforce app in Enterprise, Unlimited, and Developer editions.

Who: To use the Rebate Analytics dashboards, you must have the Manufacturing Analytics Plus add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and choose **App**. Select **Analytics for Manufacturing**, and then follow the instructions in the wizard to create your app.
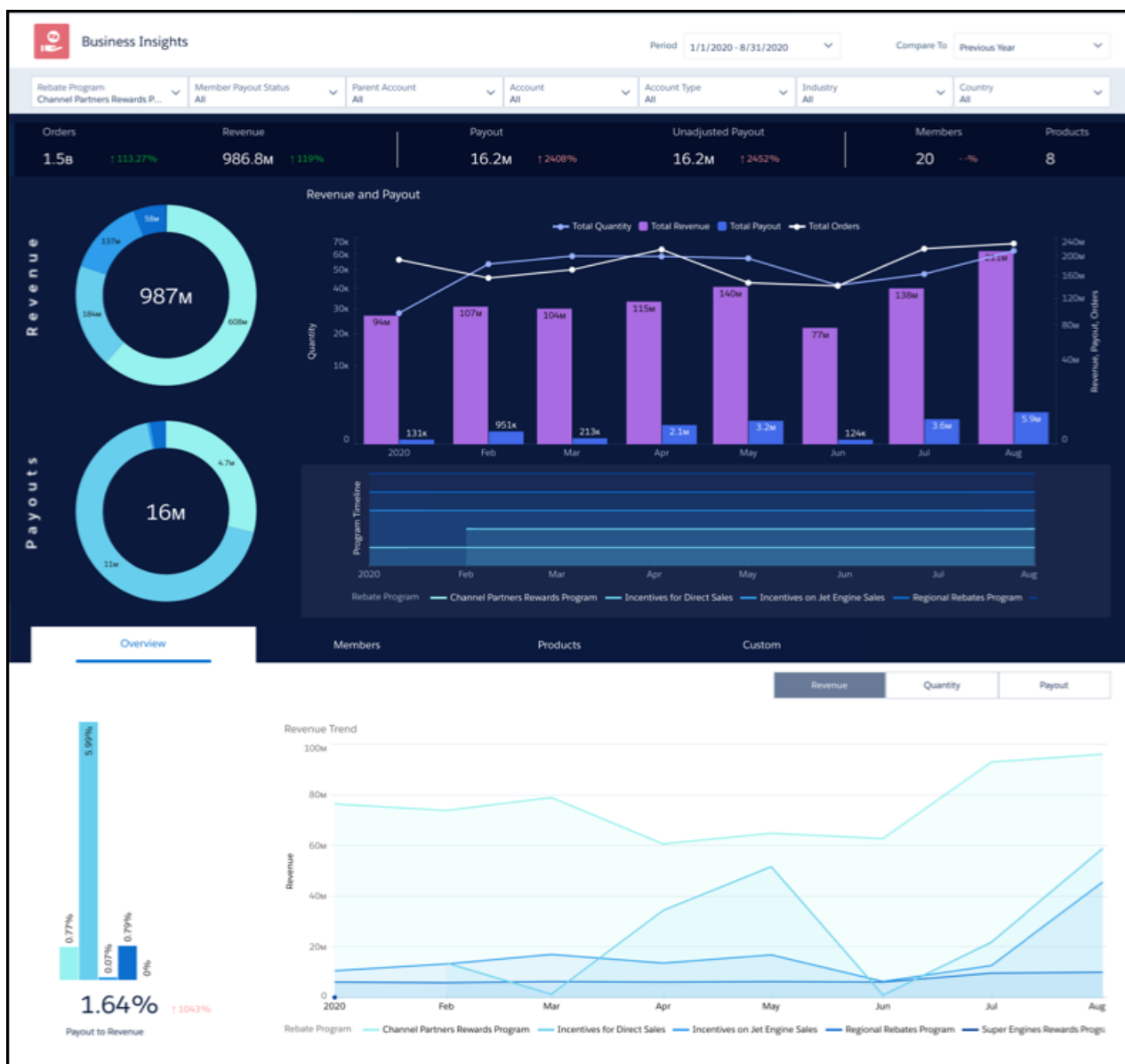
Health Cloud

Health Cloud brings you better ways to manage your patient and provider data. We've made it easier to create provider records, and we've built a new FHIR-aligned data model for electronic health records. Intelligent Document Management is more flexible and easier to use, and Intelligent Sales adds calendars to help your users get more out of surgical visits.

IN THIS SECTION:

[Create Provider API](#)

We've add a convenient business API to support provider data population so customers can easily manage all the providers in their networks.

Create Provider API

We've add a convenient business API to support provider data population so customers can easily manage all the providers in their networks.

Why: This reduces the steps involved in creating a provider record and its related records to a single API call.

How: A new business API enables you to programmatically enroll providers along with the related entities, such as Operating Hours, Specialty, and more.

SEE ALSO:

Interoperability

Health Cloud has a brand new data model for all your electronic health record (EHR) needs. This new set of standard objects is the successor to the EHR data model that was part of the Health Cloud managed package. It's built to align with the Fast Healthcare Interoperability Resources (FHIR) R4 standards.

IN THIS SECTION:

Build reports to get a comprehensive view of the health records in the new FHIR R4-aligned data model.

FHIR R4 Support for Better Interoperability

Interoperability in Health Cloud is even better now with its new FHIR R4-aligned data model. This new data model is built entirely on core and offers 26 new standard objects and updates to a few existing Health Cloud objects for all your electronic health record (EHR) needs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this data model, your Salesforce org must be provisioned with the Health Cloud license.

Why: Built to align with the industry standards defined by HL7's FHIR R4, the new data model supports greater interoperability with external EHR systems. The new objects in this data model are the successors to their counterpart custom objects in the Health Cloud managed package's existing EHR data model.

How: To use the new data model, from **Setup**, go to **FHIR R4 Support Settings** and enable the **FHIR-Aligned Data Model** org pref.

> 📝 Note:
> - Starting with the Summer '22 release, new customers won't be able to create records in the packaged EHR objects that have counterpart standard objects in the FHIR R4-aligned data model.
> - All future development in Health Cloud will be built on the FHIR R4-aligned data model. The packaged objects in the EHR data model won't be used for future development.

SEE ALSO:

Run Reports on the FHIR R4-Aligned Data Model

Build reports to get a comprehensive view of the health records in the new FHIR R4-aligned data model.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this data model, your Salesforce org must be provisioned with the Health Cloud license.

When: This change was planned for the Summer '21 release, but is available from the first week of March 2021.

Intelligent Document Automation

We've added several features to Intelligent Document Automation to make it easier to configure and use. You can map incoming documents to Care Requests and custom objects., and users can see at a glance which documents have already been processed.

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.

IN THIS SECTION:

When a call center agent transforms a document, now you can provide a ready-made set of document checklist items for them to choose from, so they don't have to find one themselves or create a new one.

A new icon shows users at a glance when a page in a document has been transformed as part of the patient intake process.

SEE ALSO:

Salesforce Help: Intelligent Document Automation

Create Action Plans Automatically

When a call center agent transforms a document, now you can provide a ready-made set of document checklist items for them to choose from, so they don't have to find one themselves or create a new one.

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.

How: Create an action plan template based on the document type, and give it a selection of document checklist items.

Why: Action plans are the containers for document checklist items. When your users receive a document, they can choose from a list of document checklist items to attach it to. The next time they receive a similar document, Salesforce automatically creates the same set of document checklist items.

See Transformed Pages

A new icon shows users at a glance when a page in a document has been transformed as part of the patient intake process.
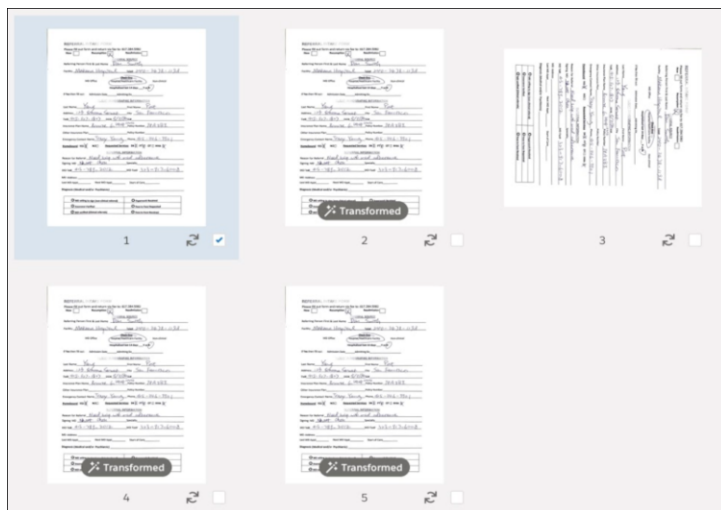
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To use this feature, you must have the Health Cloud license provisioned in Salesforce.

Intelligent Form Reader

Intelligent Form Reader with Amazon Textract makes it easier to get the right data out of the right documents fast—even if they're handwritten forms. You can manage all the required documentation in one place, and define follow-up actions based on what's in the document.

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 and the Intelligent Form Reader add-on license. Users need the Health Cloud and Health Cloud Platform permission set licenses.

Why: When a case manager signs a patient up for services or brings a patient into a home health service, 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. With Intelligent Form Reader, data from faxed or uploaded documents is pulled directly into Health Cloud, reducing the need for users to manually manage documents.

How: Admins map incoming document types to Health Cloud data objects. When users upload forms as PDF, PNG, or JPEG files, Health Cloud automatically creates a record for each document. Amazon Textract pulls the data from the image into that record, and Health Cloud distributes the data to the Salesforce objects mapped by the admin.

For printed documents, Intelligent Form Reader works with text in English, Spanish, German, Italian, Portuguese, and French. Only English is supported for handwritten documents.

IN THIS SECTION:

[Resolve Unclear Field Values in Received Documents](#)
Forms can be messy in real life. When a field in a document is mapped to multiple values or multiple fields are mapped to the same value, users can resolve it in real time by choosing the right value to map the field to. For example, if the Name field was mapped to Lead.FirstName but Lead.FirstName is already filled, the user can choose whether to keep the original First Name value or replace it.

SEE ALSO:

[Salesforce Help: Intelligent Form Reader](#)

Resolve Unclear Field Values in Received Documents

Forms can be messy in real life. When a field in a document is mapped to multiple values or multiple fields are mapped to the same value, users can resolve it in real time by choosing the right value to map the field to. For example, if the Name field was mapped to Lead.FirstName but Lead.FirstName is already filled, the user can choose whether to keep the original First Name value or replace it.

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 and the Intelligent Form Reader add-on license.

How: This form contains two phone fields: one for the patient and one for the referring facility. The call center agent can now pick the right field in the record to store each number.

Intelligent Sales

Intelligent Sales is making it easier for your users to track their visits with Salesforce Calendars.

IN THIS SECTION:

Track Visits on the Salesforce Calendar

Visits now show up as events on the primary visitor's Salesforce Calendar. This change can help you monitor your visits better and stay on top of all of them.

Track Visits on the Salesforce Calendar

Visits now show up as events on the primary visitor's Salesforce Calendar. This change can help you monitor your visits better and stay on top of all of them.

Where: This change applies 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 need the Health Cloud and Health Cloud Add-On licenses provisioned.

How: To see visits on calendars, from **Setup**, go to **Visit Calendar Settings** and enable **Add Visits to Salesforce Calendar**.

📝 Note: Only visits scheduled after this setting is enabled are automatically added to the calendar.

Choose from Account Types in the Analytics for Healthcare App

Now you can select between the Person or Individual account record type when you create your Analytics for Healthcare app. This update allows the app to accurately reflect the account record type you're using in your Salesforce org.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To create an app from the Analytics for Healthcare template, you need the Healthcare Analytics Plus add-on license.

How: In Tableau CRM Analytics Studio, click **Create**, and choose **App**. Find and select **Analytics for Healthcare.** In the wizard, you can now select which account record type represents an individual.

If you have an existing app, you can upgrade to view the new functionality. To upgrade your app, from the Tableau CRM home page, click **New version available**, and then follow the wizard's instructions. Note that upgrading an app removes any customizations you made.

Share Vaccine Information with Vaccine Eligibility Packages

Offer a sign-up form to receive updates from you about the COVID-19 vaccine. Send recipients emails and text messages based on their responses.

Where: This change applies to Lightning Experience in Enterprises and Unlimited editions.

Who: Additional product, feature, or user licenses may be required, such as the Health Cloud license provisioned in Salesforce.

SEE ALSO:

Salesforce Help: Vaccine Eligibility Packages

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

Where: This change applies to Enterprise, Performance, and Unlimited editions.

FHIR R4-Aligned Data Model

Specify identifiers for supported business records
Use the new `Identifier` object.

Store detailed information about the language a person speaks
Use the new `PersonLanguage` object.

Specify the care performer in an observation, immunization, or procedure
Use the new `CarePerformer` object.

Store information about a patient's medical reaction
Use the new `PatientHealthReaction` object.

Store information about a patient's immunization
Use the new `PatientImmunization` object.

Store information about a patient's medical procedure
Use the new `PatientMedicalProcedure` object.

Add more details to a `PatientMedicalProcedure` record
Use the new `PatientMedicalProcedureDetail` object.

Store dosage information about a patient's prescribed medication
Use the new `PatientMedicationDosage` object.

Store information about a patient's health condition
Use the new `HealthCondition` object.

Store information about a patient's allergy or intolerance
Use the new `AllergyIntolerance` object.

Store information about a medication
Use the new `Medication` object.

Store information about the medication a patient is taking or has taken in the past
Use the new `MedicationStatement` object.

Store information about the medication ordered or prescribed for a patient
Use the new `MedicationRequest` object.

Store information about a patient's care observation
Use the updated `CareObservation` object.

Add a component of an observation to a `CareObservation` record
Use the new `CareObservationComponent` object.

Store information about a clinical warning or notification
Use the new `ClinicalAlert` object.

Store information about a patient's health encounter
Use the new `ClinicalEncounter` object.

Add diagnostic information to a `ClinicalEncounter` record
Use the new `ClinicalEncounterDiagnosis` object.

Add information about an encounter's facility to a `ClinicalEncounter` record
Use the new `ClinicalEncounterFacility` object.

Add an identifier to a `ClinicalEncounter` record
Use the new `ClinicalEncounterIdentifier` object.

Add information about the provider involved in an encounter to a `ClinicalEncounter` record
Use the new `ClinicalEncounterProvider` object.

Add information about the reason for an encounter to a `ClinicalEncounter` record
Use the new `ClinicalEncounterReason` object.

Associate a `ClinicalServiceRequest` record to a `ClinicalEncounter` record
Use the new `ClinicalEncounterSvcRequest` object.

Store information about service requests for a patient
Use the new `ClinicalServiceRequest` object.

Add more details to a `ClinicalServiceRequest` record
Use the new `ClinicalServiceRequestDetail` object.

Store information about a patient's diagnostic report
Use the new `DiagnosticSummary` object.

Store information about a healthcare facility
Use the new `HealthcareFacility` object.

Indicate whether a patient's account is still active
Use the new `IsActive` field on the `Account` object.

Indicate the period that a patient's account was active
Use the new `EffectiveDate` and `EndDate` fields on the `Account` object.

Specify a patient's marital status
Use the new `MaritalStatus` field on the `Contact` object.

Specify a patient's gender
Use the new `Gender` field on the `Contact` object.

Specify a patient's date of death
Use the new `DeceasedDate` field on the `Contact` object.

In case the patient was part of a multi-child birth, specify the patient's sequence in the birth
Use the new `MultipleBirthSequence` field on the `Contact` object.

Financial Services Cloud

Track branch performance and productivity with new Branch Management features. Capture life events and business milestones on-the-go, and get more control over display options for the Policy component. See more at-a-glance in Actionable Relationship Center (ARC), which now includes Compliant Data Sharing participants and a configurable set of related lists. Enhance Compliant Data Sharing with participant groups and non-owner participant sharing. Take structured notes of client or partner interactions and share them with stakeholders in a compliant manner with the new Interaction Summaries feature. Speed up document-driven processes by using Intelligent Form Reader to recognize and copy data from uploaded files. Optimize record rollups and rollup-by-lookup (RBL) calculations with improved code and the high-performance RBL framework.

IN THIS SECTION:

Branch Management

Track branch performance and productivity with Branch Management. The Branch Management Console app, data model, and branch association engine (beta) features let banks and administrators track the work output of branches, employees, and customer segments in Financial Services Cloud. Branch Management works seamlessly with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

Insurance for Financial Services Cloud

New options on the Policy component give you greater control over the information that you want to appear on the component. With the Life Events or Business Milestones component now supported on mobile devices, agents can capture life events or business milestones on the go.

Actionable Relationship Center (ARC)

View Compliant Data Sharing record participants and related lists with compact layouts enabled in ARC.

Interaction Summaries

Take structured notes of client or partner interactions and share them with stakeholders in a compliant manner with the new Interaction Summaries feature.

Compliant Data Sharing

Create participant groups and share records with them. Non-owner participants can now share records, and Interaction Summary is enabled for Compliant Data Sharing.

Intelligent Form Reader

Intelligent Form Reader lets users copy field data from scanned, uploaded files. First, set up mapping templates for common document types. Then speed up document-driven business processes by using Intelligent Form Reader to recognize and copy important data from uploaded files.

Rollups for Financial Services Cloud

Use optimized code for record rollups and record rollup triggers. Perform rollup-by-lookup (RBL) calculations faster with the new, high-performance RBL framework.

Other Financial Services Cloud Changes

Do more with other Financial Services Cloud enhancements.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

New Financial Services Cloud Metadata Types

Do more with the new metadata types.

Branch Management

Track branch performance and productivity with Branch Management. The Branch Management Console app, data model, and branch association engine (beta) features let banks and administrators track the work output of branches, employees, and customer segments in Financial Services Cloud. Branch Management works seamlessly with existing Financial Services Cloud features, and prepares an organization for relationship marketing at the branch level.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Set up branch hierarchies, and synchronize them with service territories and account hierarchies as needed. Link branches and associated records to the key Service Cloud objects (Service Territory, Service Territory Member, and Service Resource) that power Salesforce Scheduler and Field Service Lightning.

To enable automatic branch association for accounts and leads, add the Branch Selector component to a Salesforce application.

IN THIS SECTION:

With the Branch Management data model, you can define branch hierarchies and personnel assignments with the Branch Unit, Business Member, and Banker objects. Create branch member types by creating custom objects that implement the Business Member object interface. Attribute customers and other records to specific branches using the Branch Unit Customer and Branch Unit Related Record objects. Align with Service Cloud records by relating branch data to service territories and service resources.

The Branch Management Console is a one-stop shop where admins can define branch hierarchies and record data about branches and branch members. The app includes tabs for listing and editing Branch Units, Bankers, and Branch Unit Business Member assignments. Admins can give branch managers and other users access to the app. Anyone with access can manage branch information.

The Branch Selector is a Utility Bar tool that lets users select the branch unit they're working with. After a user selects their current branch, any account or lead records created by that user are automatically associated to that branch. A user's current branch is active until they select a different branch. You can add the Branch Selector component to any Financial Services Cloud app, such as Wealth Management or Retail Banking.

Gain insights about branch performance and productivity by automatically tracking the accounts and leads that bankers create at each branch. Monitor branch performance by creating branch-specific reports about accounts, leads, and branch members.

Do you need a better understanding of how your employees in different branches are performing so that you can improve operations? Do you want to be able to see how skills are distributed across your different branches? You can use the new Branch Management dashboard in the Analytics for Retail Banking app to get a comprehensive view of your employees' activities in different branches. For example, you can see the clients, total balance, lead conversion, and closed wins for employees in different branches.

Capture Branch Hierarchies and Members with the Branch Data Model

With the Branch Management data model, you can define branch hierarchies and personnel assignments with the Branch Unit, Business Member, and Banker objects. Create branch member types by creating custom objects that implement the Business Member object interface. Attribute customers and other records to specific branches using the Branch Unit Customer and Branch Unit Related Record objects. Align with Service Cloud records by relating branch data to service territories and service resources.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: The Branch Management data model lets you define your branch structure and employee and partner assignments so you can track activities and performance by branch.

Define Branches and Members in the Branch Management Console

The Branch Management Console is a one-stop shop where admins can define branch hierarchies and record data about branches and branch members. The app includes tabs for listing and editing Branch Units, Bankers, and Branch Unit Business Member assignments. Admins can give branch managers and other users access to the app. Anyone with access can manage branch information.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: From the App Launcher, find and open the Branch Management Console app

Open the .Branch Management navigation menu to see the options for working with branches, bankers, business unit members, and branch customers.
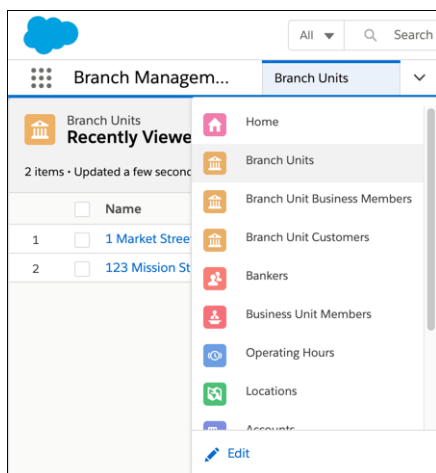
Set Your Branch Context with the Branch Selector

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Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Add the Branch Selector component to apps to let branch managers and members specify the branch they're currently working with.
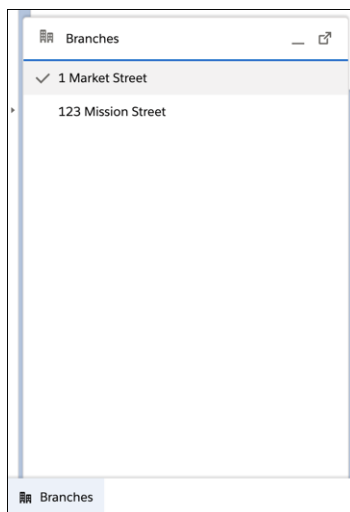
Track Account and Lead Creation with Automatic Branch Association (Beta)

Gain insights about branch performance and productivity by automatically tracking the accounts and leads that bankers create at each branch. Monitor branch performance by creating branch-specific reports about accounts, leads, and branch members.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Automatically assign new accounts and leads to a branch. Automatic assignment happens whenever an active banker with an active current branch creates or edits an account or lead record.

Trace new leads back to their original branch to gain insights about branch productivity.

Improve Branch Operations in the Analytics for Retail Banking App

Do you need a better understanding of how your employees in different branches are performing so that you can improve operations? Do you want to be able to see how skills are distributed across your different branches? You can use the new Branch Management dashboard in the Analytics for Retail Banking app to get a comprehensive view of your employees' activities in different branches. For example, you can see the clients, total balance, lead conversion, and closed wins for employees in different branches.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: The Analytics for Retail Banking app is only for Salesforce Financial Services Cloud users. To create an app from the Analytics for Retail template, you must also have the FSC Analytics Plus add-on license.

How: In Tableau CRM Analytics Studio, click **Create**, and choose **App**. Find and select **Analytics for Retail Banking**, and then follow the instructions in the wizard to create your app. A new dashboard is included in the template.

If you have an existing app, you can upgrade to view the new functionality. To upgrade your app, from the Tableau CRM home page, click **New version available**, and then follow the wizard's instructions. Note that upgrading an app removes any customizations you made.

Insurance for Financial Services Cloud

New options on the Policy component give you greater control over the information that you want to appear on the component. With the Life Events or Business Milestones component now supported on mobile devices, agents can capture life events or business milestones on the go.

IN THIS SECTION:

Capture Life Events and Business Milestones on the Go
The Life Events or Business Milestones component is now supported on mobile devices. No matter where you are, you can capture events or milestones with just a few taps on your mobile device. To view the details about an event or milestone, tap on that event or milestone.

PK Chunking Support Added for Key Claim and Policy Objects
We added Primary Key (PK) chunking support for Claim, ClaimParticipant, CustomerProperty, InsurancePolicy, InsurancePolicyAsset, and InsurancePolicyParticipant objects. With PK chunking, you get better performance and reliability when performing bulk queries on these objects.

Policy Component Enhancements
With the new Set Policy Types Order option on the Policy component, keep the most popular or frequently used policy types at the top of the list. Craft a custom title for the Policy component that reflects the information it displays.

Analytics for Insurance
Use the new Analytics for Insurance dashboards to analyze your households and uncover cross-sell opportunities. The improved configuration wizard makes it easier to customize your Analytics for Insurance app data. Get predictive insights even faster with the Einstein Discovery for Insurance Analytics template.

Capture Life Events and Business Milestones on the Go

The Life Events or Business Milestones component is now supported on mobile devices. No matter where you are, you can capture events or milestones with just a few taps on your mobile device. To view the details about an event or milestone, tap on that event or milestone.

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: Add the Life Events or Business Milestones component to the account or person account page layout for mobile devices.
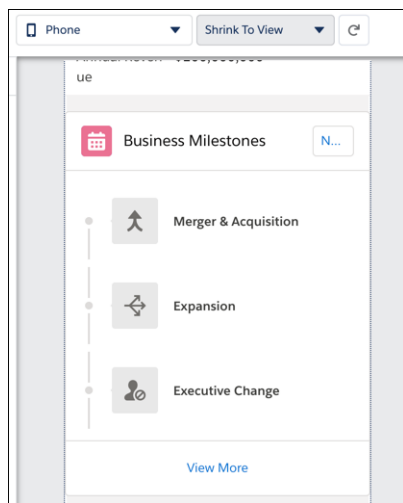
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Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the FSC Insurance permission set to use this feature.

Policy Component Enhancements

With the new Set Policy Types Order option on the Policy component, keep the most popular or frequently used policy types at the top of the list. Craft a custom title for the Policy component that reflects the information it displays.

IN THIS SECTION:

List Policy Types in the Order You Want
You can now customize the policy type display order on the Policy component. For example, you can keep the most popular or frequently used policy types at the top of the list. By default, policy types appear in alphabetical order.

You can now change the default title of the Policy component to a custom title that best indicates the information you choose to display.

Learn about other small but important changes that improve your experience with the Policy component.

List Policy Types in the Order You Want

You can now customize the policy type display order on the Policy component. For example, you can keep the most popular or frequently used policy types at the top of the list. By default, policy types appear in alphabetical order.

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 account page, and select the Policy component. In the properties pane, under Set Policy Types Order, click **Select**. Move policy types to the Selected list, and reorder them by dragging them up or down the list.

SEE ALSO:

Financial Services Cloud Administrator Guide: Set Policy Type Order (can be outdated or unavailable during release preview)

Craft a Custom Title for the Policy Component

You can now change the default title of the Policy component to a custom title that best indicates the information you choose to display.

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 record page, and select the Policy component. In the properties pane, in the **Title** field, enter a title for the component.

SEE ALSO:

> *Financial Services Cloud Administrator Guide*: Set a Custom Title for the Policy Component (can be outdated or unavailable during release preview)

Other Changes to the Policy Component

Learn about other small but important changes that improve your experience with the Policy component.

Where: These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud is enabled.

Why: To make the Policy component more user-friendly, we made some small changes that can make a big difference.

No more static labels on the Policy component
The Policy component now uses the Name Insured field label from the policy record to indicate that the account or household is the policy owner. Previously, it used a static label, Owner.

Claims have a new icon
We replaced the old claim icon with a new one that's a better indicator of claims.
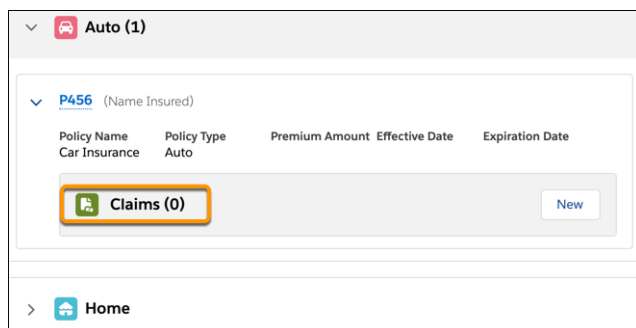
View more policies under each policy type

The Policy component now shows 10 insurance policies under each policy type. Previously, it showed five.

Show the most relevant details

We removed the Policy Number field from the component, giving you room to add one more field of your choice. On the relevant page layout, edit the Insurance Policies related list to add the field you want.

Analytics for Insurance

Use the new Analytics for Insurance dashboards to analyze your households and uncover cross-sell opportunities. The improved configuration wizard makes it easier to customize your Analytics for Insurance app data. Get predictive insights even faster with the Einstein Discovery for Insurance Analytics template.

IN THIS SECTION:

Analyze Households and Uncover Cross-Sell Opportunities

The new Households dashboard helps agents effectively manage their books of business, identify high-value households, and discover opportunities to increase revenue.

Create Apps with or without Lead History

Enjoy greater flexibility when creating an app with the enhanced wizard. You can choose to include or exclude lead history data in your dashboards.

Set Up Predictions Faster

Use the enhanced configuration wizard to set up predictions for your Einstein Discovery for Insurance Analytics App even faster. Build datasets, run stories, deploy models, and create dashboards with just one click.

Analyze Households and Uncover Cross-Sell Opportunities

The new Households dashboard helps agents effectively manage their books of business, identify high-value households, and discover opportunities to increase revenue.

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: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select **Analytics for Insurance** and follow the instructions in the wizard to create your app.
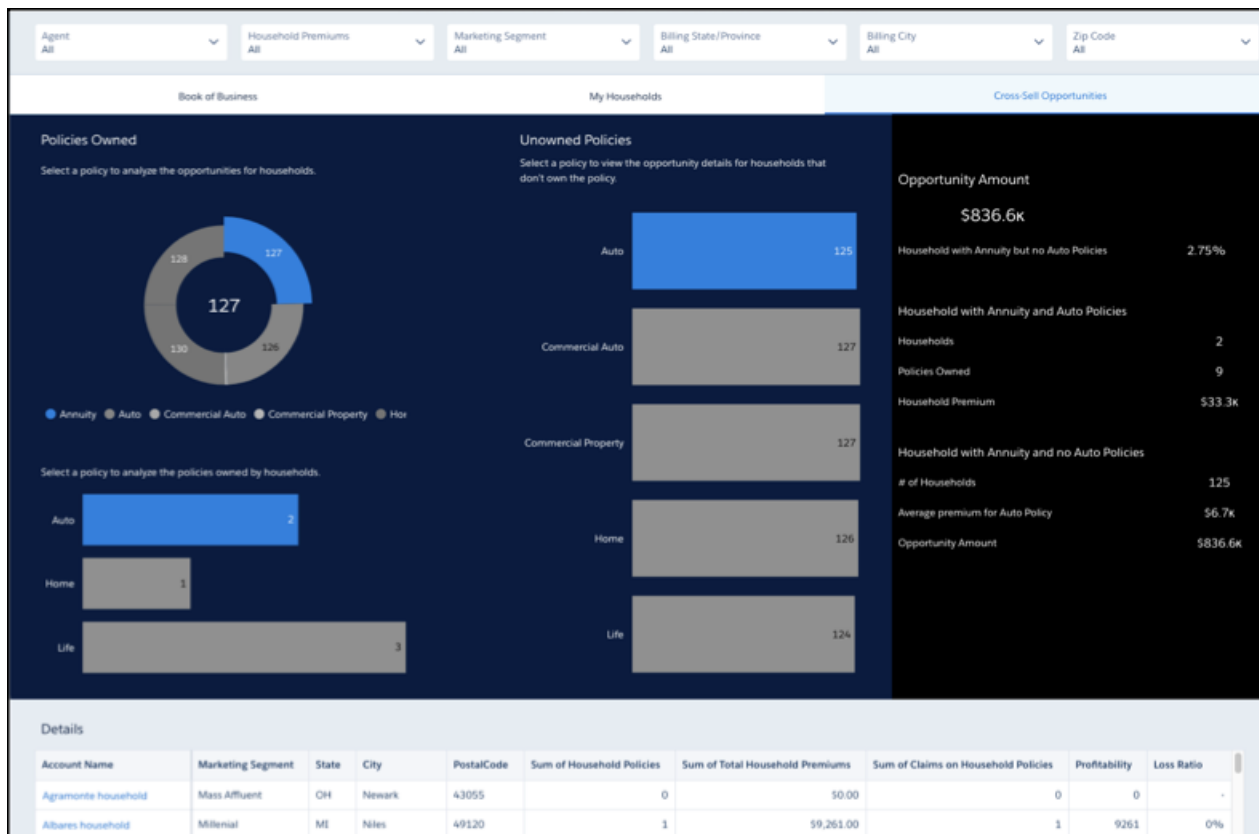
Create Apps with or without Lead History

Enjoy greater flexibility when creating an app with the enhanced wizard. You can choose to include or exclude lead history data in your dashboards.

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 include or exclude lead history data in the app.

Set Up Predictions Faster

Use the enhanced configuration wizard to set up predictions for your Einstein Discovery for Insurance Analytics App even faster. Build datasets, run stories, deploy models, and create dashboards with just one click.

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.

How: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select **Einstein Discovery for Insurance Analytics** and follow the instructions in the wizard to create your app.

Actionable Relationship Center (ARC)

View Compliant Data Sharing record participants and related lists with compact layouts enabled in ARC.

IN THIS SECTION:

[View Record Participants in ARC](#)
ARC's detail panel now shows a list of participants and participant groups with access to the selected record.

[Changes to Related Lists in ARC](#)
Display up to 10 related lists with an enabled compact layout in ARC. And related lists now appear in a collapsed state by default after the Financial Services Cloud junction objects.

View Record Participants in ARC

ARC's detail panel now shows a list of participants and participant groups with access to the selected record.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: In ARC detail panel, select the Participants tab.

📝 Note: To see record participants, Compliant Data Sharing for the selected record type must be enabled.

Changes to Related Lists in ARC

Display up to 10 related lists with an enabled compact layout in ARC. And related lists now appear in a collapsed state by default after the Financial Services Cloud junction objects.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: In Lightning App Builder, edit the default page layout for the root object and add or remove related lists from the Related Lists container.

📝 Note: ARC only shows related lists with a compact layout enabled.
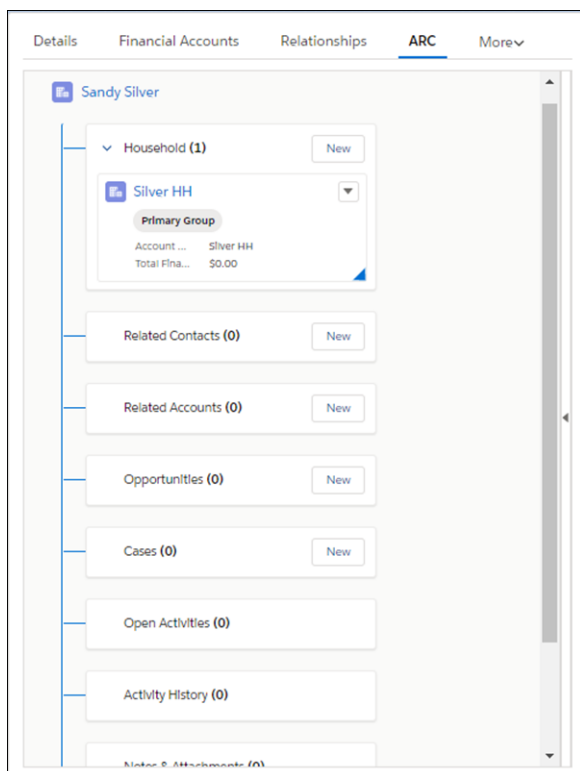
Interaction Summaries

Take structured notes of client or partner interactions and share them with stakeholders in a compliant manner with the new Interaction Summaries feature.

IN THIS SECTION:

[Capture and Share Meeting Notes with Interaction Summaries](#)
Help bankers and financial advisors build and deepen customer relationships with the new Interaction Summaries data model. They can manage every aspect of client and partner interactions and take advantage of structured note-taking and compliant, role-based data sharing options. When you add the Interaction Summaries Lightning component to the home or account page, they can create interaction summaries linked with interactions. And by adding the Interaction Attendees Lightning component to the interaction summary or interaction page, they have an easy way to see and add attendees.

Capture and Share Meeting Notes with Interaction Summaries

Help bankers and financial advisors build and deepen customer relationships with the new Interaction Summaries data model. They can manage every aspect of client and partner interactions and take advantage of structured note-taking and compliant, role-based data sharing options. When you add the Interaction Summaries Lightning component to the home or account page, they can create interaction summaries linked with interactions. And by adding the Interaction Attendees Lightning component to the interaction summary or interaction page, they have an easy way to see and add attendees.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Why: When creating an interaction summary, bankers and financial advisors can take detailed meeting notes, specify the confidentiality level of the notes, and add action items or next steps. They can share notes that contain confidential information only with relevant stakeholders to maintain compliance. Before their next meeting, they can quickly search or filter interaction summaries to find and review past interaction summaries and be better prepared for the meeting. On an account page, the Interaction Summaries component shows all interaction summaries for that account. On the Home page, it shows interaction summaries that the banker has access to across all accounts.

How: To enable interaction summaries in your org, on the Interaction Summary Settings page in Setup, enable **Interaction Summary**.
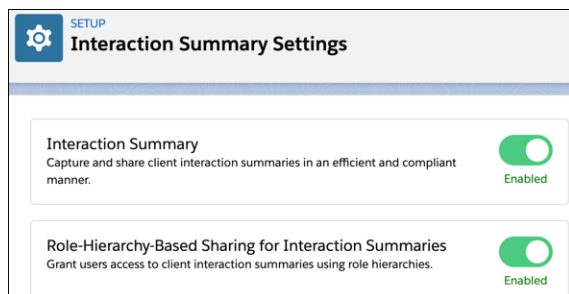
SEE ALSO:

Share Interaction Summaries in a Compliant Manner

Financial Services Cloud Administrator Guide: Capture and Share Interaction Summaries (can be outdated or unavailable during release preview)

Compliant Data Sharing

Create participant groups and share records with them. Non-owner participants can now share records, and Interaction Summary is enabled for Compliant Data Sharing.

IN THIS SECTION:

Share Records with Participant Groups

A participant group is a group used by Compliant Data Sharing that contains users who play the same role in their record interactions. Create participant groups and share records with them like you would with participants.

Allow Non-Owners to Share Records

Compliant Data Sharing now allows a participant with edit access to a record to share that record with other participants.

Share Interaction Summaries in a Compliant Manner

Interaction summaries give users another way to capture and manage customer communication and build customer relationships. Compliant Data Sharing allows users to ensure that interaction summaries containing confidential information such as Material Non-Public Information (MNPI) are only shared with relevant stakeholders to maintain compliance.

Share Records with Participant Groups

A participant group is a group used by Compliant Data Sharing that contains users who play the same role in their record interactions. Create participant groups and share records with them like you would with participants.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Share a record with a group of users like a coverage team or support team without having to create individual participant records for each team member. Assigning a participant group to a record, instead of each of the users in the group minimizes share table operations and improves performance. Members of a participant group can be individual users or participant groups or a mix of the two.

📝 **Note:** A record can have a maximum of 20 participants.

How: From Setup, under Compliant Data Sharing, select **Participant Groups**. After a participant group is created, share a record with it as you would with a participant.

Allow Non-Owners to Share Records

Compliant Data Sharing now allows a participant with edit access to a record to share that record with other participants.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: A non-owner participant with edit access to a record can share it with other relevant team members.

Share Interaction Summaries in a Compliant Manner

Interaction summaries give users another way to capture and manage customer communication and build customer relationships. Compliant Data Sharing allows users to ensure that interaction summaries containing confidential information such as Material Non-Public Information (MNPI) are only shared with relevant stakeholders to maintain compliance.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

Capture and Share Meeting Notes with Interaction Summaries

Intelligent Form Reader

Intelligent Form Reader lets users copy field data from scanned, uploaded files. First, set up mapping templates for common document types. Then speed up document-driven business processes by using Intelligent Form Reader to recognize and copy important data from uploaded files.

IN THIS SECTION:

Automate Financial Data Capture Using Mappings

Simplify record management and reduce manual effort and errors in capturing customer financial data. OCR-mapping automates data collection from customer-submitted information such as W2 forms, tax returns, or other financial documents. You can then update or create a record or use it to verify the accuracy of an existing record.

Extract Information from Uploaded Documents

Accelerate document-driven business processes by using optical character recognition (OCR) technology to extract fields from documents uploaded by borrowers, partners, or loan officers. Any Salesforce process that uses document checklist items can use this new Intelligent Form Reader capability.

Automate Financial Data Capture Using Mappings

Simplify record management and reduce manual effort and errors in capturing customer financial data. OCR-mapping automates data collection from customer-submitted information such as W2 forms, tax returns, or other financial documents. You can then update or create a record or use it to verify the accuracy of an existing record.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled.

How: Identify the fields that you want to capture when a document is uploaded. Create a mapping for the fields using the Intelligent Form Reader.

Define the form type that you want to scan and the object that stores the scanned data.

Add keys and define the key names that you want to map to the Salesforce object fields from the uploaded document.

For example, you can create a mapping to verify the employment details from a W2 form that a borrower uploads. The form reader extracts information from the designated areas and then stores it in the mapping fields.

Extract Information from Uploaded Documents

Accelerate document-driven business processes by using optical character recognition (OCR) technology to extract fields from documents uploaded by borrowers, partners, or loan officers. Any Salesforce process that uses document checklist items can use this new Intelligent Form Reader capability.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Users often rely on scans of important documents when inputting or verifying important information. Manually entering field data based on scanned documents can be time consuming. Automatically extracting data from document files can speed up document-driven data capture processes.

How: List the document files required to gather or verify important information as document checklist items. Salesforce users or Experience Cloud users then upload files for each document. Other Salesforce users then review the uploaded files and use the Intelligent Form Reader OCR capability to extract field data from the files.

For example, a loan applicant can upload a scan of their latest W2 form to verify their employment. A loan officer then reviews the uploaded file. They select a W2 mapping template that maps visual areas on the scanned document to fields in a Loan Application

Employment record. The Intelligent Form Reader component then recognizes and copies text information from those visual areas and stores it in the corresponding fields.

Rollups for Financial Services Cloud

Use optimized code for record rollups and record rollup triggers. Perform rollup-by-lookup (RBL) calculations faster with the new, high-performance RBL framework.

IN THIS SECTION:

Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine
Switch to the new Rollup-by-Lookup (RBL) framework and use the superior processing power of Tableau CRM for faster calculations of RBL rules. The new RBL framework lets you convert your existing RBL rules into Data Processing Engine definitions. The high-performance Data Processing Engine definitions significantly reduce the processing time to aggregate financial information. In Data Processing Engine, you have greater flexibility when defining or modifying RBL rules. For example, you can add multiple data sources, define joins and appends, and add formulas to your rules.

Optimize Record Rollups (GA)
Use the Record Rollup Optimization org preference to improve record rollup performance.

Use Optimized Record Rollup Triggers
Use optimized code to improve Before Insert and Before Update record rollup trigger performance for more objects.

Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine

Switch to the new Rollup-by-Lookup (RBL) framework and use the superior processing power of Tableau CRM for faster calculations of RBL rules. The new RBL framework lets you convert your existing RBL rules into Data Processing Engine definitions. The high-performance Data Processing Engine definitions significantly reduce the processing time to aggregate financial information. In Data Processing Engine, you have greater flexibility when defining or modifying RBL rules. For example, you can add multiple data sources, define joins and appends, and add formulas to your rules.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: To enable the new RBL framework, in Setup, on the General Settings page for Financial Services, enable **RBL Using Data Processing Engine**. To convert your existing RBL rules into Data Processing Engine definitions, enable **Convert RBL Rules into Data Processing Engine Definitions**.
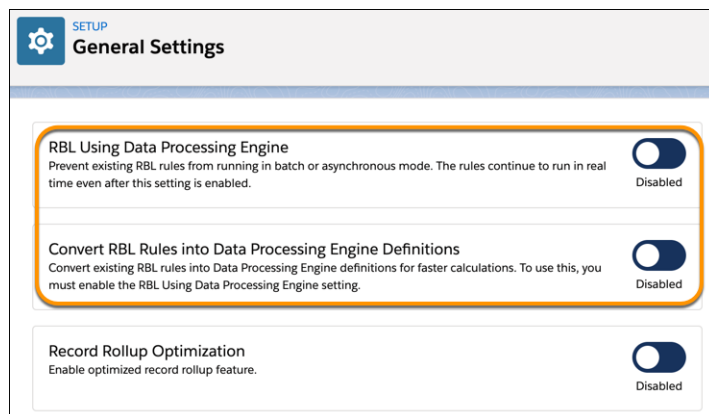
SEE ALSO:

Financial Services Cloud Administrator Guide: Perform Rollup-by-Lookup Calculations Faster with Data Processing Engine (can be outdated or unavailable during release preview)

Optimize Record Rollups (GA)

Use the Record Rollup Optimization org preference to improve record rollup performance.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: From Setup, under Financial Services General Settings, enable **Record Rollup Optimization**.

SEE ALSO:

Financial Services Cloud Administrator Guide: Optimize Record Rollup Performance (can be outdated or unavailable during release preview)

Financial Services Cloud Administrator Guide: Define Rollup Settings for Objects (can be outdated or unavailable during release preview)

Use Optimized Record Rollup Triggers

Use optimized code to improve Before Insert and Before Update record rollup trigger performance for more objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: From Setup, in Custom Metadata Types, click **Manage Records** for Use Standard Trigger. Select an object and then select **Active** to enable optimized code for that object.

Other Financial Services Cloud Changes

Do more with other Financial Services Cloud enhancements.

IN THIS SECTION:

Drive Client Engagement with Life Event Insights

To help drive client engagement, the Analytics for Wealth Management app now includes person life event data that you can aggregate into groups. Life events can include occasions such as birthdays or retirement. For example, you can create a marketing campaign for clients near retirement age or send greetings to clients who are recently married.

Stay Productive with More Financial Services Cloud Lightning Components for Mobile

Boost remote user productivity by adding more Financial Services Cloud Lightning components to the Salesforce mobile app.

Use the Flexibility of the Optional Customer Property Field

The Customer Property field in the Insurance Policy Asset object is now optional. Existing users don't have access to this field by default. Update the field-level security either using permission sets or profiles to provide access to users.

Drive Client Engagement with Life Event Insights

To help drive client engagement, the Analytics for Wealth Management app now includes person life event data that you can aggregate into groups. Life events can include occasions such as birthdays or retirement. For example, you can create a marketing campaign for clients near retirement age or send greetings to clients who are recently married.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: The Analytics for Wealth Management app is only for Salesforce Financial Services Cloud users. To create an app from the Analytics for Wealth Management template, you must also have the FSC Analytics Plus add-on license.

How: In Tableau CRM Analytics Studio, click **Create**, and choose **App**. Find and select **Analytics for Wealth Management**, and then follow the instructions in the wizard to create your app.

If you have an existing app, you can upgrade to view the new functionality. To upgrade your app, from the Tableau CRM home page, click **New version available**, and then follow the wizard's instructions. Note that upgrading an app removes any customizations you made.

Stay Productive with More Financial Services Cloud Lightning Components for Mobile

Boost remote user productivity by adding more Financial Services Cloud Lightning components to 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 additional Financial Services Cloud components that are mobile-enabled.

Table 4: Mobile-Enabled Components

Component	Description
Financial Account Alert	Display an alert message on a financial account page.
Financial Account List	Show a related list of financial accounts on an account page.
Financial Account Role List	Show a related list of financial account roles on an account page.
Group Members	Show a related list of group members and rollup totals on a group-enabled account page.
Group Members (Configurable)	Show a related list of group members and rollup totals on a group-enabled account page. Can be configured to show fields for those members based on a given field set.
Relationship Group List	List the relationship groups that an account, contact, or individual belongs to.

Use the Flexibility of the Optional Customer Property Field

The Customer Property field in the Insurance Policy Asset object is now optional. Existing users don't have access to this field by default. Update the field-level security either using permission sets or profiles to provide access to users.

Where: These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud is enabled.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Branch Management

Capture branch information and define branch hierarchies

Use the new `BranchUnit` object.

Record users or contacts who can work with each branch

Use the new `BranchUnitBusinessMember` object.

Identify users who work in the banker role at branches

Use the new `Banker` object.

Record the customers associated with each branch

Use the new `BranchUnitCustomer` object.

Interaction Summary

Capture an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner

Use the new `Interaction` object.

Store the attendees of an interaction

Use the new `InteractionAttendee` object.

Store the summary of an interaction, including confidentiality information

Use the new `InteractionSummary` object.

View the users with whom an interaction summary is shared

Use the new `InteractionSummaryParticipant` object.

Insurance

Associate a claim with an insurance policy coverage and store information about financial activities related to the claim, including payouts and reserves

Use the new `ClaimCoverage` object.

View the amount of money paid to a claimant or claim participant to cover a claim

Use the new `ClaimPaymentSummary` object.

Store the charges calculated for an insurance policy and its related assets, coverages, and participants in a region

Use the new `InsurancePolicySurcharge` object.

Store the transaction related to a change that affects tan insurance policy's premium, such as an endorsement, renewal, or cancellation

Use the new `InsurancePolicyTransaction` object.

Store a producer's commission for an insurance policy

Use the new `ProducerCommission` object.

New Fields on ClaimItem

Categorize claim items based on involved persons or property

Use the new `Category` field.

Specify the exact address where the claim item is located
Use the new `CurrentAddress` field.

Associate a claim participant with the claim item
Use the new `ClaimParticipantId` field.

Associate an insurance policy asset with the claim item
Use the new `InsurancePolicyAssetId` field.

New Fields on ClaimParticipant

Specify the insurance policy participant associated with the claim
Use the new `InsurancePolicyParticipantId` field.

New Fields on InsurancePolicy

View the ID of the original insurance policy
Use the new `OriginalPolicyId` field.

View the date when the original policy went into effect
Use the new `OriginalEffectiveDate` field.

View the expiration date of the original policy
Use the new `OriginalExpirationDate` field.

Specify the premium calculation method for a payment period
Use the new `PremiumCalculationMethod` field.

Specify the type of premium payment, such as Advance or Arrears
Use the new `PremiumPaymentType` field.

Specify the time period for which the policy provides coverage
Use the new `PolicyTerm` field.

View the total insured amount
Use the new `TotalSumInsured` field.

View the date up to which the policy is paid for
Use the new `PaidToDate` field.

View the expected fee for the policy over the policy period
Use the new `StandardFeeAmount` field.

View the expected premium for the policy over the policy period
Use the new `StandardPremiumAmount` field.

View the expected tax on the policy over the policy period
Use the new `StandardTaxAmount` field.

View the expected fee for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermFeeAmount` field.

View the expected premium for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermPremiumAmount` field.

View the sum of the expected premium, fee, and tax for the policy over the policy period
Use the new `TotalStandardAmount` field.

View the expected tax on the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermTaxAmount` field.

New Fields on InsurancePolicyAsset

View the insured customer property
Use the new `AssetName` field.

View the primary participant on the policy
Use the new `PrimaryPolicyParticipantId` field.

View the expected fee for the policy over the policy period
Use the new `StandardFeeAmount` field.

View the expected premium for the policy over the policy period
Use the new `StandardPremiumAmount` field.

View the expected tax on the policy over the policy period
Use the new `StandardTaxAmount` field.

View the expected fee for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermFeeAmount` field.

View the expected premium for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermPremiumAmount` field.

View the sum of the expected premium, fee, and tax for the policy over the policy period
Use the new `TotalStandardAmount` field.

View the expected tax on the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermTaxAmount` field.

View the sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TotalTermAmount` field.

New Fields on InsurancePolicyMemberAsset

View the insurance policy associated with the asset
Use the new `InsurancePolicyId` field.

New Fields on InsurancePolicyCoverage

View the expected fee for the policy over the policy period
Use the new `StandardFeeAmount` field.

View the expected premium for the policy over the policy period
Use the new `StandardPremiumAmount` field.

View the expected tax on the policy over the policy period
Use the new `StandardTaxAmount` field.

View the expected fee for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermFeeAmount` field.

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View the sum of the expected premium, fee, and tax for the policy over the policy period
Use the new `TotalStandardAmount` field.

View the expected tax on the policy over the policy period, prorated based on the policy's effective dates
Use the new `TermTaxAmount` field.

New Fields on InsurancePolicyParticipant

Specify whether this client owns the policy or is just a participant on the policy
Use the new `IsPolicyholder` field.

View the expected fee for the policy over the policy period
Use the new `StandardFeeAmount` field.

View the expected premium for the policy over the policy period
Use the new `StandardPremiumAmount` field.

View the expected tax on the policy over the policy period
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View the sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates
Use the new `TotalTermAmount` field.

Intelligent Form Reader

OcrDocumentScanResult Object
Add a document ID of the content to the OCR document scan result

- Use the `ContentDocumentId` field to add the content document ID for the `OcrDocumentScanResult` object.

Properties updated for the object

- The `nillable` and `updateable` properties on the `ContentVersionId` field have changed to `false`.
- The `createeable` property on the `PageNumber` field has changed to `false`.
- The `nillable` and `defaultedOnCreate` properties on the `OcrService` field have changed to `false`.

Deprecated fields on the object

- `OwnerId`
- `DocumentRequestId`

Deprecated value from the `OcrService` field

- `AMAZON_TEXTRACT`

OcrDocumentScanResult Object

Choose an OCR scan service in the `OcrDocumentScanResult` object

- Use the Amazon Textract service for scanning the documents by selecting the `AMAZON_TEXTRACT` value from the `OcrService` picklist.

Add a document request ID in the `OcrDocumentScanResult` object

- Use the `DocumentRequestId` field to add the document request Id.

OcrSampleDocument Object

Deprecated fields on the object

- `NamespacePrefix`

OcrTargetObject Object

Deprecated values on the `TargetObject` picklist

- `LicensingError`
- `ChannelProgramLevelOwnerSharingRule`

OcrTargetObjFieldMapping Object

Deprecated values on the `TargetField` picklist

- `DeceasedDate`
- `Division`
- `Gender`
- `IdeaThemeId`
- `SequenceInMultipleBirth`

New values supported by the `TargetField` picklist

- `DeclarationExtIdentifier`
- `EmploymentExtIdentifier`
- `Email FinancialExtIdentifier`
- `AddressExtIdentifier`
- `UrlName`
- `TitleHolderExtIdentifier`
- `SourceSystemIdentifier`
- `UniversalPolicyNumber`
- `LiabilityExtIdentifier`
- `AssetExtIdentifier`
- `ApplicationExtIdentifier`
- `ReportNumber`
- `PropertyExtIdentifier`
- `IncomeExtIdentifier`
- `ApplicantExtIdentifier`

OcrTemplate Object

Deprecated fields on the object

- `NamespacePrefix`

Properties updated on the object

- The `nillable` property on the `TemplateName` field has changed to `true`.
- The `nillable` property on the `DocumentTypeId` field has changed to `true`.
- The `createeable` property on the `IsActive` field has changed to `false`.

OcrTemplateSampleDocument Object

Property updated on the object

- The `nillable` property on the `OcrSampleDocumentId` field has changed to `false`.

New Financial Services Cloud Metadata Types

Do more with the new metadata types.

Compliant Data Sharing

Retrieve and edit participant details, including their name and associated default access level

Use the ParticipantRole metadata type. Introduced in API version 50.0, this type has been added to the *Financial Services Cloud Developer Guide*.

Consumer Goods Cloud

Ensure that reps perform the right activities during their store visits with Einstein Visit Task Recommendations. Streamline store deliveries by creating vehicle-user assignments for reps. Predefine activity sequences to help your reps perform their visit tasks in the most effective order. Help sales managers create retail store records faster with the Retail Store enhancements. And with the Visit Execution and Direct Store Delivery enhancements, help your reps become more efficient during their store visits.

IN THIS SECTION:

Einstein for Consumer Goods Enhancements

Make store visits more efficient and productive with intelligent task recommendations.

Plan Store Deliveries Better with Controlled Vehicle-User Assignments

Streamline store deliveries by creating vehicle-user assignments for reps. When a vehicle-user assignment is active, no other assignment involving that vehicle or user can be activated. Eliminate assignment-related confusion and ensure smoother and faster deliveries to stores. Also, sales managers can add product inventories for vehicles. When reps know the exact inventory, they're better able to meet ad hoc requests from a store.

Access Visit and Order Details on the Retail Store Page

Give your sales managers easy access to all visit and order details for a store. When you add the Visits and Orders related lists to the Retail Store page layout, sales managers can see all visits and orders for a store right on the store page. And they can create visits and place orders for the store directly from the store page.

Visit Execution Enhancements

Field reps can now add tasks to visits on the fly to better service a store. Predefine activity sequence to help your reps perform their visit tasks in the most effective order.

Analytics for Consumer Goods

Monitor the price compliance of a store and improve retail execution. Use the enhanced Einstein Discovery story to get intelligent insights into a store's performance and increase store sales.

Einstein for Consumer Goods Enhancements

Make store visits more efficient and productive with intelligent task recommendations.

IN THIS SECTION:

Plan the Right Tasks for a Visit with Einstein Visit Task Recommendation

Sales managers can now identify the right set of visit tasks to maximize profits and deliver brand value with Einstein Visit Task Recommendations. Task recommendations are based on and tailored to address your unique business requirements.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: Use the provided sample flow to learn how task recommendations are generated. Then create a flow based on your business requirements. Sales managers can use the flow to create task recommendation requests for an existing visit or visit recommendation.

Sales managers can also create task recommendation requests when creating visit recommendation requests.

SEE ALSO:

Get Visit Recommendation Using Predictions

Help your sales managers make every field rep visit count. Identify the visit metrics that you want to collect and build insights around them. Map these insights to your visit recommendation strategies and get an optimal recommendation in return.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Users need the Retail Execution Lightning Plus permission set to use this feature.

How: First, create a prediction using the Einstein Prediction Builder.

Then, map the predictions in the strategy you create with Next Best Action.

Next, run the Visit Recommendation request and view the suggestions based on the predictions. You can also see the strategy and prediction reasons for the recommendation.
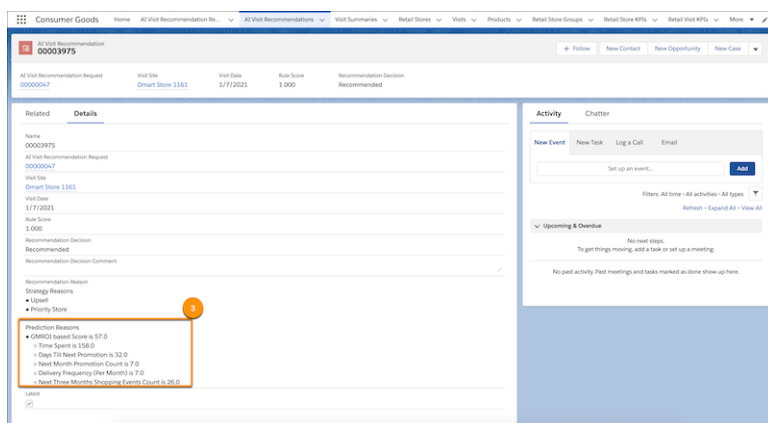
Use Einstein for Consumer Goods with Lightning Retail Execution Starter License

Einstein for Consumer Goods is now available with the Lightning Retail Execution Starter license.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

# Plan Store Deliveries Better with Controlled Vehicle-User Assignments

Streamline store deliveries by creating vehicle-user assignments for reps. When a vehicle-user assignment is active, no other assignment involving that vehicle or user can be activated. Eliminate assignment-related confusion and ensure smoother and faster deliveries to stores. Also, sales managers can add product inventories for vehicles. When reps know the exact inventory, they're better able to meet ad hoc requests from a store.

Where: This change applies to Lightning Experience in Developer, Performance, Enterprise, and Unlimited Editions where Consumer Goods Cloud is enabled.

How: To create a vehicle user assignment, select the **Vehicle User Assignment** tab, and then click **New**.

To view the available inventory in a vehicle, reps can select the **Vehicle Inventory** tab.
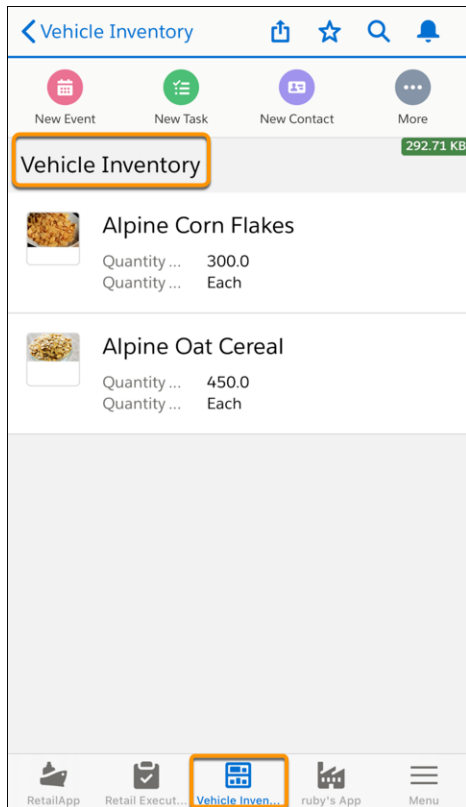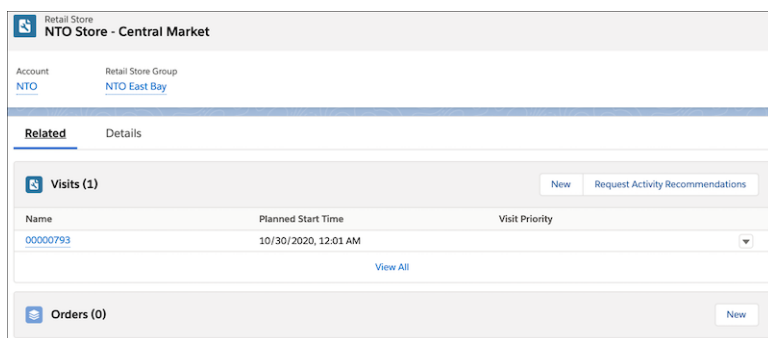
SEE ALSO:

Salesforce Help: Assign a Vehicle to a Rep (can be outdated or unavailable during release preview)

Access Visit and Order Details on the Retail Store Page

Give your sales managers easy access to all visit and order details for a store. When you add the Visits and Orders related lists to the Retail Store page layout, sales managers can see all visits and orders for a store right on the store page. And they can create visits and place orders for the store directly from the store page.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: Add Visits and Orders related lists to the Retail Store page layout.

Visit Execution Enhancements

Field reps can now add tasks to visits on the fly to better service a store. Predefine activity sequence to help your reps perform their visit tasks in the most effective order.

IN THIS SECTION:

Serve Stores Better by Creating Tasks on the Fly

Field reps can now add tasks during a visit to ensure that they don't miss opportunities to better service a store. For example, if a product is out of stock, the field rep can create an order task and place an order for the product right away.

Streamline Task Execution with Task and KPI Sequencing

Help your reps perform their visit tasks in the most effective order and make the most of the time they spend at stores during visits. With a predefined, logical sequence of visit activities, you eliminate confusion and guesswork so that reps understand which task to perform next.

Stay Organized with Assigned Tasks

Assign minor activities to reps, such as delivering promotional materials or meeting with store managers. Add these activities to reps' task lists to ensure that they get done during store visits.

Serve Stores Better by Creating Tasks on the Fly

Field reps can now add tasks during a visit to ensure that they don't miss opportunities to better service a store. For example, if a product is out of stock, the field rep can create an order task and place an order for the product right away.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: On a visit home page, from the menu on the top right, click **Add a Task**.
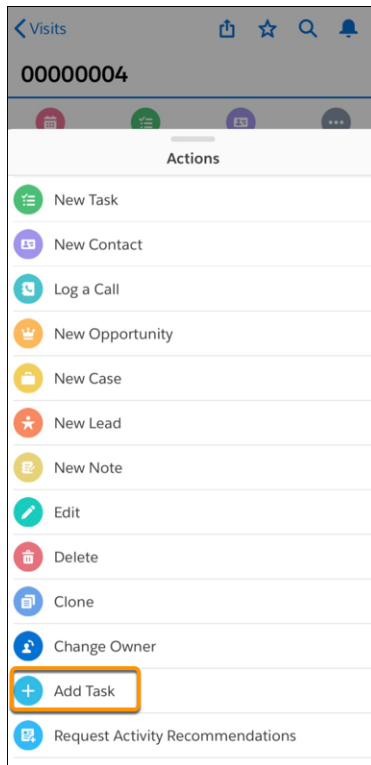
SEE ALSO:

> *Salesforce Help*: Create a Task (can be outdated or unavailable during release preview)

Streamline Task Execution with Task and KPI Sequencing

Help your reps perform their visit tasks in the most effective order and make the most of the time they spend at stores during visits. With a predefined, logical sequence of visit activities, you eliminate confusion and guesswork so that reps understand which task to perform next.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: When creating a task or assessment task definition, enter a display order.

SEE ALSO:

> *Salesforce Help*: Associate an Assessment Task Definition to an Action Plan Template (can be outdated or unavailable during release preview)

> *Salesforce Help*: Associate an Assessment Task Definition to an Assessment Indicator Definition (can be outdated or unavailable during release preview)

Stay Organized with Assigned Tasks

Assign minor activities to reps, such as delivering promotional materials or meeting with store managers. Add these activities to reps' task lists to ensure that they get done during store visits.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: When creating an action plan template, click **New**, and then click **Tasks**.

SEE ALSO:

> *Salesforce Help*: Associate Tasks to an Action Plan Template (can be outdated or unavailable during release preview)

Analytics for Consumer Goods

Monitor the price compliance of a store and improve retail execution. Use the enhanced Einstein Discovery story to get intelligent insights into a store's performance and increase store sales.

IN THIS SECTION:

[Monitor Store Price Compliance with Analytics for Consumer Goods](#)

The Analytics for Consumer Goods app gives you insights into a store's price compliance and helps you improve retail execution.

[Analyze Store Performance and Increase Sales with Einstein Discovery](#)

Use the enhanced Maximize Units Sales from Store Order story to see how your store is performing when compared to the average performance for a store group or all stores. The input variables are now calculated by comparing KPI values with the average of a store group or all stores.

Monitor Store Price Compliance with Analytics for Consumer Goods

The Analytics for Consumer Goods app gives you insights into a store's price compliance and helps you improve retail execution.

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 Analytics for Consumer Goods template, you must also have the Analytics for Consumer Goods add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select the Analytics for Consumer Goods template and follow the instructions in the wizard to create your app.

Analyze Store Performance and Increase Sales with Einstein Discovery

Use the enhanced Maximize Units Sales from Store Order story to see how your store is performing when compared to the average performance for a store group or all stores. The input variables are now calculated by comparing KPI values with the average of a store group or all stores.

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 Analytics for Consumer Goods template, you must also have the Analytics for Consumer Goods add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and select **App**. Select the Analytics for Consumer Goods template and follow the instructions in the wizard to create your app.

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 do even more with Consumer Goods objects.

Set up retail stores faster

The new Address field on the Retail Store object helps sales managers create retail store records faster because they no longer create a location every time they create a store record.

Easily share retail store records

The Retail Store object now inherits sharing rules from the Account object. So when you give your reps access to account records, they automatically get access to retail store records.

Understand Visit Recommendation flows

Use the Visit Recommendation - Sample Flow to understand how visit recommendations are generated.

Do more with Consumer Goods object records

You can now attach files, add notes, and make Chatter posts on Consumer Goods object records. You can also create formula fields and enable field history tracking on key Consumer Goods objects.

Better manage access to Consumer Goods objects with updated permission sets

Starting in Winter '21, the default access levels are updated for Consumer Goods objects in the Lightning Retail Execution Merchandiser, Lightning Retail Execution Starter, Lightning Retail Execution Plus, and Lightning Retail Execution Contractor permission sets. You can change the access levels according to your requirements.

SEE ALSO:

[User Licenses](#)

Trailhead Module: [Create Formula Fields (can be outdated or unavailable during release preview)](#)

Salesforce Help: [Track Field History for Standard Objects](#)

Consumer Goods Cloud Has New Objects

Do more with the new Consumer Goods Cloud and Einstein Visit Task Recommendations objects.

Associate a vehicle to a driver

Use the new `VehicleUserAssignment` object.

New Field on the RetailVisitKpi Object

Identify the reference object associated with the RetailVisitKPI

Use the new `ContextId` field on the `RetailVisitKpi` object.

New Field on the Retail Store Object

Add a retail store address

Use the new `Address` field on the `RetailStore` object.

New Objects for Einstein Visit Task Recommendations

Create requests to generate visit task recommendations

Use the new `AiVisitTaskRcmdRequest` object.

View all visit task recommendations

Use the new `AiVisitTaskRcmd` object.

New Objects for Einstein Visit Recommendations

Track posts on the visit recommendation feed

Use the new `AiVisitRecommendationFeed` object.

View the history of the changes to the visit recommendation

Use the new `AiVisitRecommendationHistory` object.

Track posts on the visit recommendation request feed

Use the new `AiVisitRecommendRequestFeed` object.

View the history of the changes to the visit recommendation request

Use the new `AiVisitRecommendRequestHistory` object.

Track posts on the image feed
> Use the new `ImageFeed` object.

View the history of the changes to the images
> Use the new `ImageHistory` object.

Consumer Goods Cloud Has a New Invocable Action

Do more with the new Einstein Visit Task Recommendations invocable action.

New Invocable Action for Einstein Visit Task Recommendations

Save visit and task recommendation decisions
> Use the new `saveRecommendationDecision` standard action to save visit and task recommendation decisions.

Connect REST API

Consumer Goods Cloud REST API includes a new call.

Einstein Visit Recommendations

Save a visit or task recommendation decision
> Make a POST request to the new `/connect/visit/recommendations/recommendation-decisions` resource with the new Recommendation Decision Input request body.

Public Sector Solutions

Add visits to the Salesforce calendar, and help your compliance officers quickly and easily check inspectors' availability when scheduling visits. New features in the Inspection Management Mobile app improve the overall inspection experience. And enhancements to the Public Sector portal improve process efficiency and ensure complete transparency throughout the application approval process.

IN THIS SECTION:

[View Regulatory Fees When Applying for a License or Permit](#)
Your constituents can now review fee information on the Application Fee Details page before they submit an application. You can choose to integrate a payment gateway to allow your constituents pay fees online with their application. The Fee Payment History page shows regulatory transaction fees associated with licenses and permits, inspections, and enforcement actions for an application. Compliance officers can see the same regulatory transaction fees on the account record page and change the fees as needed.

[View Scheduled Visits on the Salesforce Calendar](#)
Visits that your users create and assign to a field inspector appear as events on the field inspector's Salesforce calendar. Your compliance officers can quickly check field inspectors' availability to avoid scheduling conflicts when assigning visits.

[Improve the Inspection Experience with the Inspection Management Mobile App](#)
Field inspectors can amplify their productivity while conducting site visits and stay informed about the constituent's account using the Inspection Management mobile app.

[Track and Manage Complaints Better with Public Sector Site Enhancements](#)
Public Sector constituents can now add titles to their complaints to make them easily searchable. Inspectors can add comments to explain why a complaint was rejected, giving constituents more clarity. And constituents accessing the portal can now also view their complaints in a list or Kanban view.

New Objects in Public Sector Solutions

Salesforce Public Sector Solutions has new objects that help store and access information.

View Regulatory Fees When Applying for a License or Permit

Your constituents can now review fee information on the Application Fee Details page before they submit an application. You can choose to integrate a payment gateway to allow your constituents pay fees online with their application. The Fee Payment History page shows regulatory transaction fees associated with licenses and permits, inspections, and enforcement actions for an application. Compliance officers can see the same regulatory transaction fees on the account record page and change the fees as needed.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: On the Business License Application page, all fees attached to a business license application appear in the Regulatory Transaction Fees section on the Related tab. You can also view fees for individual license applications.

On the Application Fee Details page, constituents can review their application fee information.

SEE ALSO:

Salesforce Help: Set Up the Regulatory Fees Using Vlocity Integration Procedure (can be outdated or unavailable during release preview)

Salesforce Help: Configure Fee Payment History Page (can be outdated or unavailable during release preview)

View Scheduled Visits on the Salesforce Calendar

Visits that your users create and assign to a field inspector appear as events on the field inspector's Salesforce calendar. Your compliance officers can quickly check field inspectors' availability to avoid scheduling conflicts when assigning visits.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: To see visits on calendars, from **Setup**, go to **Visit Calendar Settings** and enable **Add Visits to Salesforce Calendar**.
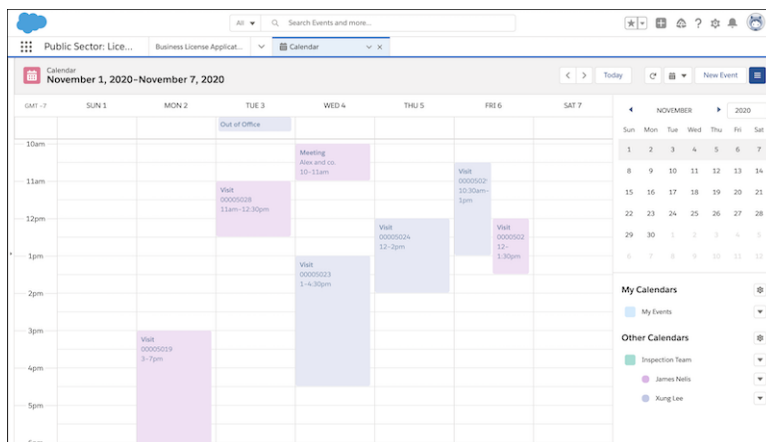
SEE ALSO:

Salesforce Help: Set Up Salesforce Calendar (can be outdated or unavailable during release preview)

Improve the Inspection Experience with the Inspection Management Mobile App

Field inspectors can amplify their productivity while conducting site visits and stay informed about the constituent's account using the Inspection Management mobile app.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

IN THIS SECTION:

Efficiently Perform Inspection Tasks

You can define task sequences for site visits to help your field inspectors be more productive. A predefined sequence directs field inspectors to complete tasks in a specific order.

Stay Informed during a Site Visit

The Inspection Management mobile app lets your users review any violations that field inspectors note during site visits. And the Details tab shows a complete history of the constituent's account.

Efficiently Perform Inspection Tasks

You can define task sequences for site visits to help your field inspectors be more productive. A predefined sequence directs field inspectors to complete tasks in a specific order.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: From the App Launcher, go to the **Action Plan Template** to define the task sequence.

SEE ALSO:

Salesforce Help: Associate Assessment Task Definitions to an Action Plan Template (can be outdated or unavailable during release preview)

Stay Informed during a Site Visit

The Inspection Management mobile app lets your users review any violations that field inspectors note during site visits. And the Details tab shows a complete history of the constituent's account.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: View violations from the Task tab and account information from the Details tab.
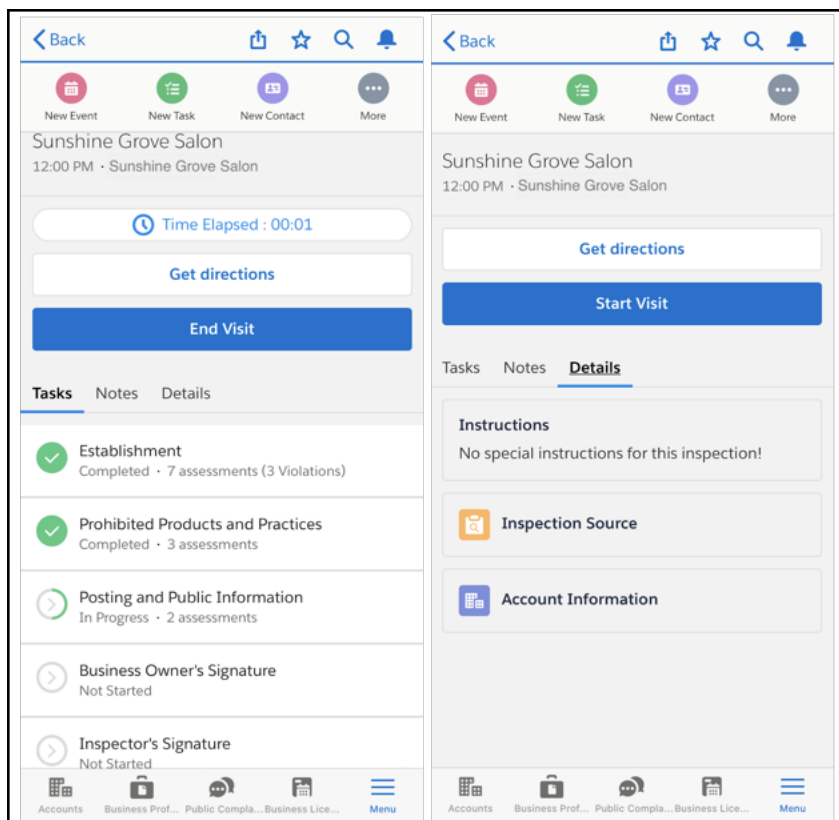
Track and Manage Complaints Better with Public Sector Site Enhancements

Public Sector constituents can now add titles to their complaints to make them easily searchable. Inspectors can add comments to explain why a complaint was rejected, giving constituents more clarity. And constituents accessing the portal can now also view their complaints in a list or Kanban view.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

How: Constituents can log in to the portal using a person account and create and view their complaints. To remain anonymous, they can log in with the **Not a member** option.

New Objects in Public Sector Solutions

Salesforce Public Sector Solutions has new objects that help store and access information.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

Associate regulatory transaction fees with your applications, inspections, or violations

Use the new `RegulatoryTrxnFee` object.

Store specific fee items associated with your regulatory transaction fees

Use the new `RegulatoryTrxnFeeItem` object.

New Fields on the PublicComplaint Object

View the subject of a PublicComplaint
Use the new `Subject` field on the `PublicComplaint` object.

View comments for a PublicComplaint
Use the new `comments` field on the `PublicComplaint` object.

SEE ALSO:
Public Sector Solutions Developer Guide for License and Permit Management, and Inspection Management: RegulatoryTrxnFee (can be outdated or unavailable during release preview)

Public Sector Solutions Developer Guide for License and Permit Management, and Inspection Management: RegulatoryTrxnFee (can be outdated or unavailable during release preview)

Emergency Response Management

Updated flows make your emergency response management experience smoother.

IN THIS SECTION:

Capture Date and Time in Contact Collection Flows
The updated Contact Collection and Contact Collection for Community flows now collect both the date and time of encounters.

Capture Date and Time in Contact Collection Flows

The updated Contact Collection and Contact Collection for Community flows now collect both the date and time of encounters.

How: If you cloned any flows from these two flows, you must deprecate the cloned flows and clone the Contact Collection or Contact Collection for Community flow again.

More Information About Communities User Licenses for Industries

We've created a new help page that lays out in detail the objects that you can share with Experience Cloud users. Use this new resource to help plan your Experience Cloud site implementation based on the licenses you have.

Why: Use Experience Cloud sites (formerly known as communities) to make some features available to users outside your org. For example, perhaps you're running a chiropractic office and you want to enable your patients to update their addresses when they move so that you don't lose touch with them. If you give your patients (that is, your Experience Cloud users) Write access to the Contact object, they can update their own contact information. But you probably don't want them changing the address of the chiropractic office, so you might just give them Read access to the Account object.

How: A community license determines the baseline set of features that an Experience Cloud user can access. Assign user permissions for data access through a profile and optionally one or more permission sets. Each community license enables you to give create, read, write, or delete permissions to Experience Cloud users for specific data objects. With the Communities User Licenses for Industries resource, you can tell at a glance which permissions you can assign on which objects under the license you have.

	Customer Community	Customer Community Plus	Partner Community	External Apps
Account	**Create**, **Read**, Edit	Create, **Read**, Edit	Create, **Read**, Edit	**Read**, Edit
AccountBrand	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AccountRelationship		Read	Read	
Accreditation	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit
ActionPlan			**Create**, **Read**, **Edit**, **Delete**	**Create**, **Read**, **Edit**, **Delete**

Analytics

Fast-track important business decisions with an improved Lightning Experience report builder, save time building and managing dashboards with reusable components, and find insights in a flash with a redesigned Einstein Discovery interface.

IN THIS SECTION:

Reports and Dashboards

Create reports faster in the Lightning Experience report builder, save dashboard filter settings in a custom URL, and export reports in .xlsx format.

Tableau CRM

Tableau CRM (formerly Einstein Analytics) brings much more than a new name to your favorite analytics platform. Integrate data between your business and Tableau CRM more seamlessly with Data Prep enhancements. Create and manage dashboards more efficiently with reusable components (generally available). And improve your Einstein Discovery predictive process with models built outside of Salesforce.

Reports and Dashboards

Create reports faster in the Lightning Experience report builder, save dashboard filter settings in a custom URL, and export reports in .xlsx format.

IN THIS SECTION:

Streamline Report Creation with Multi-Field Selection

Spend less time creating reports and more on translating results into next steps. Multi-select allows you to drag multiple fields to your reports with a single action. Plus, you can now add or remove fields and columns and preview the results without delay.

Save Dashboard Results with Filter URL Parameters

There's no need to set up the same filters each time you view your dashboard in Lightning Experience. Create a custom URL that includes the filter parameters. Then when you access the URL, your dashboard opens with the filters already set. For example, you can customize your Opportunity Stages dashboard with a different URL for each account or create a custom URL for an account owner or lead source.

Get Report Details Emailed in .xlsx Format

Get report exports in the format you want. When exporting a report, you can select .xlsx, .xls, or .csv as the format. Previously only .xls and .csv were supported.

Enable Enhanced Folder Sharing (Update, Postponed)

This update is postponed to Spring '22. It was originally scheduled for auto-activation (enforcement) in Spring '20. Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards.

Streamline Report Creation with Multi-Field Selection

Spend less time creating reports and more on translating results into next steps. Multi-select allows you to drag multiple fields to your reports with a single action. Plus, you can now add or remove fields and columns and preview the results without delay.

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

How: Select one or more fields from the Fields panel in the Lightning report builder (1) and drag them to the Columns list in the Outline panel (2) or directly to the report preview. To select multiple fields, press Ctrl (Windows), Cmd (Mac), or Shift when you click.

📝 Note: This feature isn't available for joined reports.
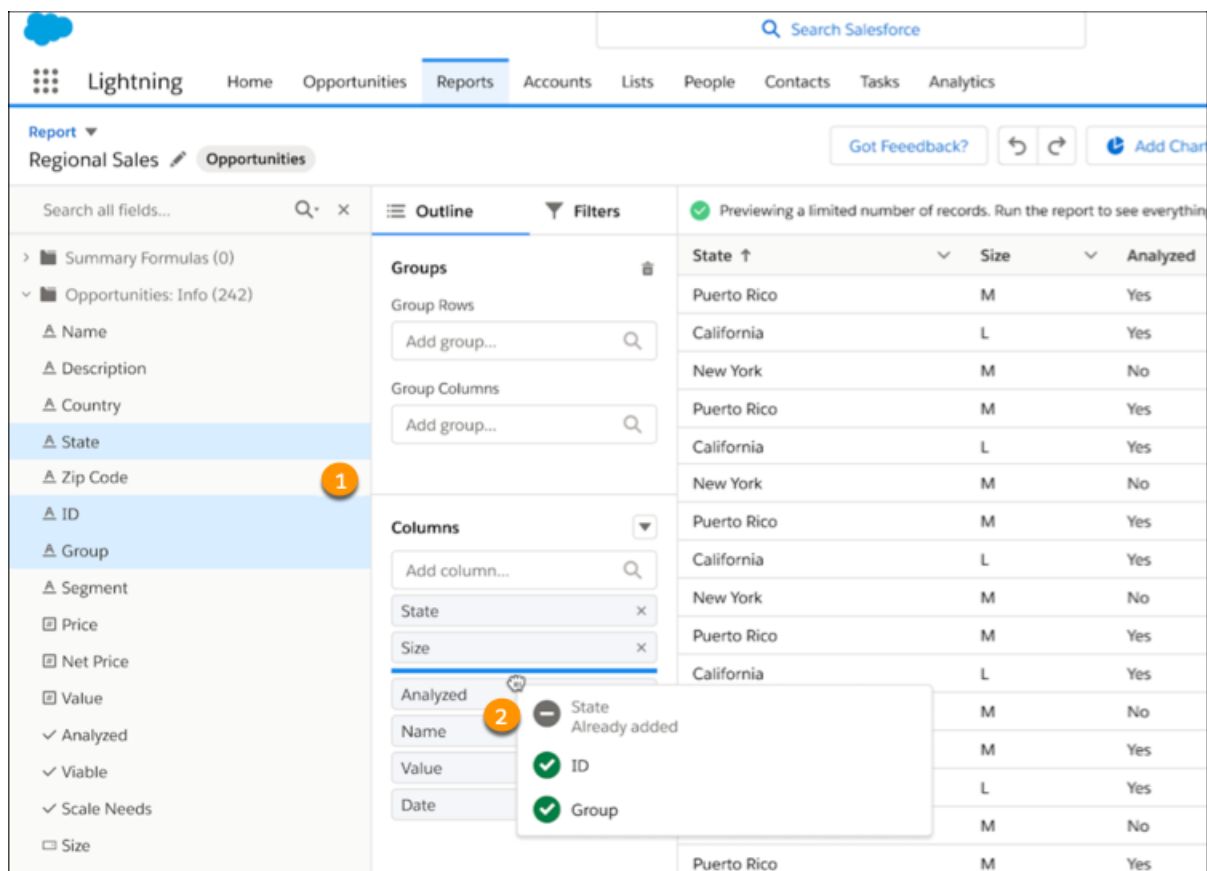
For the fastest performance when creating reports, we recommend that you disable automatic preview updates (1). But even if you leave automatic preview on, you still get better performance when adding fields, removing fields, and repositioning columns.

SEE ALSO:

IdeaExchange: Lightning Report Builder Extremely Slow and Buggy

Save Dashboard Results with Filter URL Parameters

There's no need to set up the same filters each time you view your dashboard in Lightning Experience. Create a custom URL that includes the filter parameters. Then when you access the URL, your dashboard opens with the filters already set. For example, you can customize your Opportunity Stages dashboard with a different URL for each account or create a custom URL for an account owner or lead source.
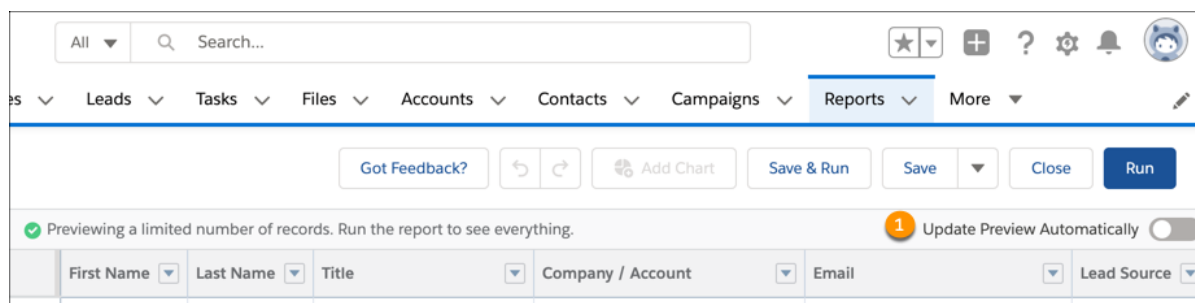
Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In the dashboard builder, set up the dashboard filters you want to use (1). Locate the URL for the dashboard page (2).
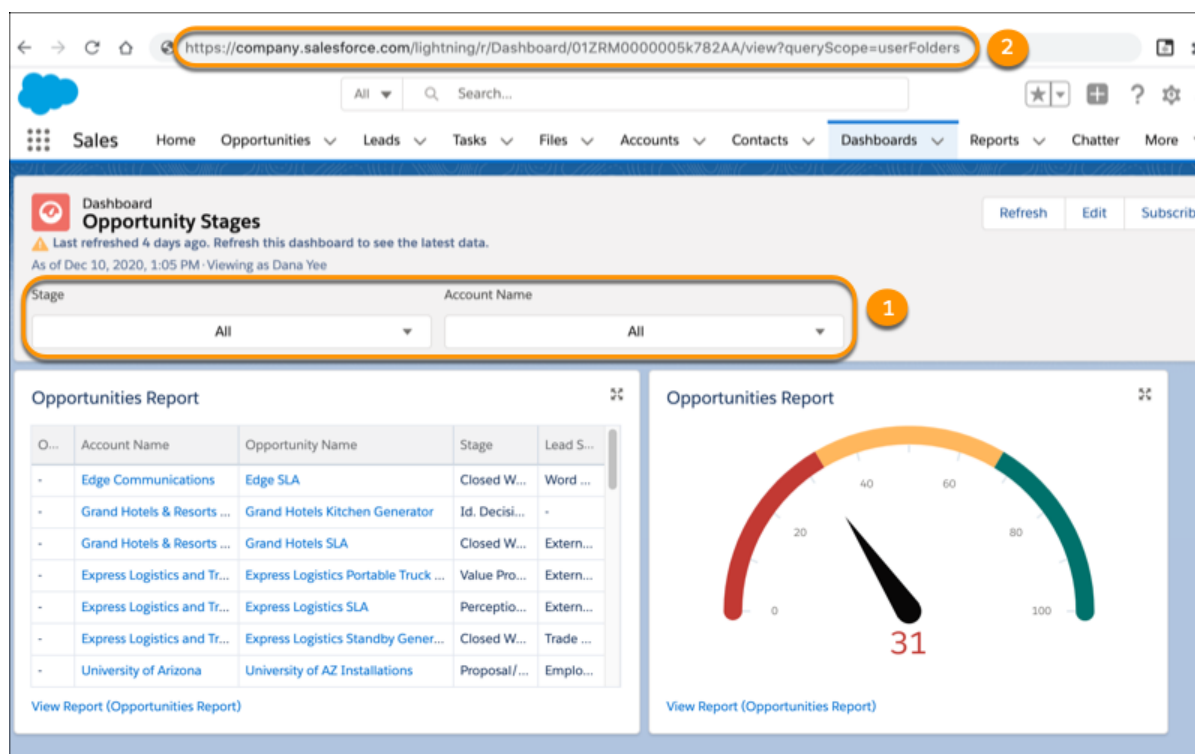
Now add the filter parameters to the end of the URL. For example, this URL sets Stage (the first filter, or fv0) to "Closed Won" and Account Name (the second filter, or fv1) to "Acme."

```
https://company.salesforce.com/lightning/r/Dashboard/01ZRM0000005jrv2AA/view?queryScope=userFolders&fv0=Closed%20Won&fv1=Acme
```

To add filters to the URL, use this structure:

- *&*—Denotes a new parameter in the URL. If no other parameters are present in the URL, then substitute `?` in place of `&`.
- *fv0*—The *fv* stands for filter value, and is the name of the parameter. The number that follows represents the order in which the filter appears in the dashboard. The first filter is `0`, the second filter is `1`, and the third is `2`.
- *=Closed%20Won*—Specifies the filter value. The parameter value must be URI encoded, which means certain characters (such as spaces) must be written in a format that URLs can understand. In the example, the space (' ') between Closed and Won becomes `%20` when URI encoded.

To open the dashboard with the filters selected, go to the URL you created. The URL is also available to share with your team or to modify and reuse.
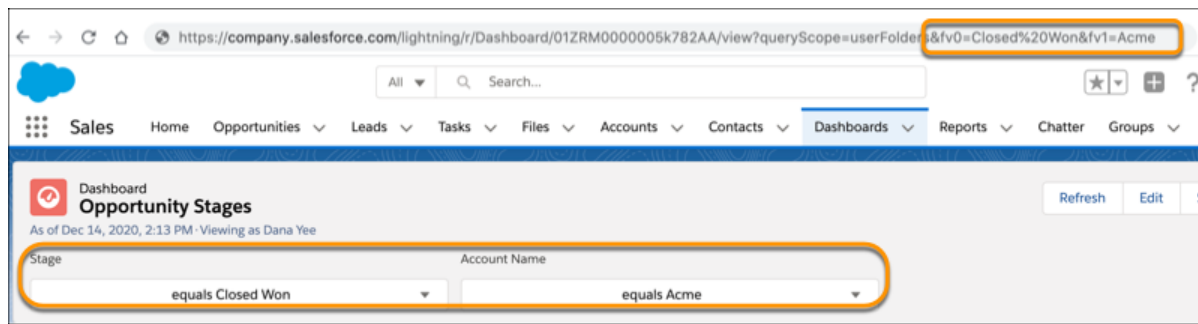
SEE ALSO:

> *IdeaExchange*: Ability to pass Dashboard filters by URL
>
> Filter Dashboards via URL Parameters in Lightning Experience

Get Report Details Emailed in .xlsx Format

Get report exports in the format you want. When exporting a report, you can select .xlsx, .xls, or .csv as the format. Previously only .xls and .csv were supported.

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

How: On the Reports page, select the **Export** row-level action for the report. Click **Details Only** and then select **.xlsx** as the **Format** option.
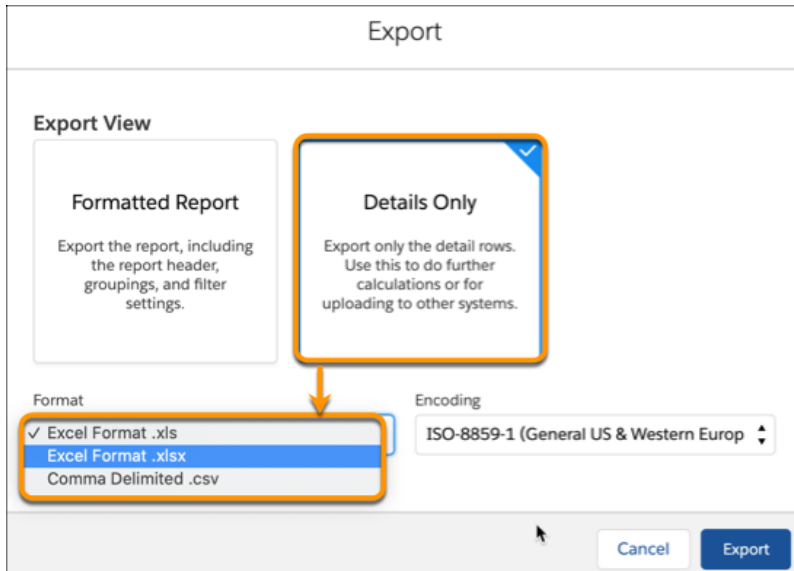
If security is a concern, you can hide the .xls option by selecting **Hide the option to export a report in XLS format in Lightning Experience** in Reports and Dashboards Settings.

Enable Enhanced Folder Sharing (Update, Postponed)

This update is postponed to Spring '22. It was originally scheduled for auto-activation (enforcement) in Spring '20. Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards.

Where: This change applies to Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

When: Retirement is targeted for Spring '22 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. After you turn on enhanced folder sharing, you can't revert to legacy folder sharing.

Tableau CRM

Tableau CRM (formerly Einstein Analytics) brings much more than a new name to your favorite analytics platform. Integrate data between your business and Tableau CRM more seamlessly with Data Prep enhancements. Create and manage dashboards more efficiently with reusable components (generally available). And improve your Einstein Discovery predictive process with models built outside of Salesforce.

IN THIS SECTION:

Einstein Analytics Is Now 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 offers the best experience for native analytics inside Salesforce CRM products. Tableau CRM continues to combine AI and BI, 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.

Tableau CRM Data Integration and Preparation

Make decisions today based on forecasts for tomorrow with Time Series Forecasting (pilot), and push Tableau CRM data into your business operations with Snowflake Sync Out (generally available) and the .csv Data Prep output node.

Analytics Prebuilt Templates and Apps

Streamline building your apps, dashboards, and stories with a Tableau CRM template specific to your industry. Get more insights into your team's activities in Revenue Operations dashboards, explore top drivers with Einstein Discovery modeling, improve branch retail bank performance using the branch management dashboard, and drive customer retention with the new Analytics for Loyalty and Rebate Analytics apps.

Analytics App Building

Streamline dashboard building with reusable components (generally available), make data more actionable with configurable actions and mass actions, and add custom details to number widgets without cluttering your dashboard.

Einstein Discovery

Navigate insights seamlessly with Einstein Discovery's new story interface, get predictions in datasets using Data Prep recipes, and predict outcomes using externally-built models that you upload and deploy into Salesforce.

Tableau CRM for Everyone

With more ways to customize Tableau CRM (formerly Einstein Analytics), you and your users can more easily set up and access relevant analytics experiences. Control how Analytics tab users access the Analytics Studio, manage asset visibility within apps (beta), provide notifications and subscriptions within embedded dashboards, and order subscription updates your way.

Salesforce Data Pipelines

Modify and enrich your Salesforce data at scale.

Einstein Analytics Is Now 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 offers the best experience for native analytics inside Salesforce CRM products. Tableau CRM continues to combine AI and BI, 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.

Where: This change applies to Tableau CRM in Lightning Experience, Salesforce Classic, and the Salesforce mobile app. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: As part of this rename, there are tool name changes and documentation updates. For instance, Einstein Analytics user licenses and permission sets are now renamed to Tableau CRM.

Tableau CRM Data Integration and Preparation

Make decisions today based on forecasts for tomorrow with Time Series Forecasting (pilot), and push Tableau CRM data into your business operations with Snowflake Sync Out (generally available) and the .csv Data Prep output node.

IN THIS SECTION:

Keep Salesforce Data Fresh in Snowflake with Sync Out (Generally Available)

With Sync Out for Snowflake, keep your Salesforce data up to date in Snowflake without the need for a third-party ETL tool. 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 Tableau CRM to Snowflake using the Tableau CRM connector for Snowflake and scheduled Data Sync. This feature is now generally available.

Export Datasets to .csv with the Data Prep Output Node

Use the Data Prep output node to save your prepared data from Tableau CRM as a data and schema file. Then you can download the data locally using the public API as a .csv file. This data push lets you transfer augmented, cleaned, and improved data from Tableau CRM into your external systems for analysis, storage, or to inform business processes. For example, export a dataset from Tableau CRM, then download it locally to explore in Microsoft Excel.

Merge Prepared Tableau CRM Data into Salesforce with the Salesforce Output Connector (Beta)

Push your prepared dataset Account, Opportunity, and custom object data into any Salesforce org from Tableau CRM with the Tableau CRM Salesforce Output connector and Data Prep. With your prepared data back in Salesforce, you can integrate external data, apply the suite of Salesforce automation tools to act on the data, and allow non-Tableau CRM users access to the data through reports and dashboards.

Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Beta)

Push your prepared data from Tableau CRM into Tableau Online with the Tableau Online Output connector and Data Prep recipes. Your transformed, merged, and cleaned data is pushed to Tableau Online as a .hyper file for further analysis. For example, prepare historical Opportunity data for struggling products in Tableau CRM, and then use Tableau Online's tools to identify helpful trends to optimize deals.

Tighter Security Encryption Requirements for Connected Data Sources

Tableau CRM is committed to keeping your data safe, so now TLS protocol version 1.2 is enforced for all connections. This TLS protocol version was already supported, but now it's enforced. Source systems that use TLS v1.1 or below can't connect until you reconfigure them.

Identify More Candidates for Simplified Row-Level Sharing with the Improved Sharing Inheritance Coverage Assessment

Easily determine which objects and users are good candidates for Sharing Inheritance with the improved Sharing Inheritance Coverage Assessment. Sharing inheritance lets Tableau CRM apply the same sharing setup for your datasets as Salesforce uses for your objects. The Sharing Inheritance Coverage tool now shows your Salesforce org's sharing descriptor limit and the top records or users with more than the limit alongside their sharing descriptor count.

Perform Calculations Across Rows with Window Functions

For each row in a data source, perform a calculation on a selection—or window—of related rows. Unlike aggregation that groups rows, window functions return a result for each row. For example, you can calculate the changes to the opportunity amount throughout the stages of each opportunity to see if you can hit your sales target. You can use window functions in a Custom Formula transformation of a Data Prep recipe.

Stay Ahead of the Game with the Smart Transform Pilot Program

Join the Smart Transform Pilot Program to try out all pilot features in Data Prep recipes. The program now includes: Time Series Forecasting transformation, Cluster transformation, and pivot functionality in the Aggregate node. Pilot features can change with each release as existing features become generally available or are retired and new pilot features are added to the program.

Anticipate the Future with Time Series Forecasting (Pilot)

Time series forecasting lets you make decisions today based on forecasts about tomorrow. Use the Time Series Forecasting transformation in a Data Prep recipe to run forecasts based on historical data. For example, estimate quarterly sales.

Find New Ways to Segment Your Data with Clustering (Pilot)

To segment rows of data into distinct clusters based on common characteristics, use the Cluster transformation in a Data Prep recipe. For example, you can cluster accounts based on account industry, rating, number of employees, and annual revenue. Using the clusters, you can identify products and services to upsell to each account based on other accounts in the same cluster.

Analyze Aggregated Data from More Angles with Pivoting (Pilot)

Use pivoting to group important metrics by dimensions in columns. For example, you can group each country's total revenue by account type to analyze revenue for each combination of country and account type. To pivot dimensions as columns, use the Aggregation node in a Data Prep recipe.

Clean Up Your Data by Standardizing Column Value Formats

When you integrate data with a Data Prep recipe, column values can have inconsistent or unwanted formats. You can now set the precision and scale for measure columns, character length for dimension columns, and date formats for date columns in the following transformations: Edit Attributes, Dimension to Measure, Measure to Dimension, and Formula.

Append Rows from Disjoint Data Sources

Now you can append data that has different columns than what's in the recipe. When you stack rows from different sources using an Append node, sometimes columns in one source don't exist in the other. The Append node in a Data Prep recipe now supports columns from the right data source that don't exist in the left.

Other Enhancements to Data Prep

Prevent API name conflicts when you join data and get up to speed with the preview change for Input nodes.

Run Recipes and Dataflows Smarter with Priority Scheduling

Do your smaller recipe or dataflow runs often wait for lengthier runs to finish? Priority scheduling for recipes and dataflows automatically manages your run queue. It prioritizes smaller and faster runs while ensuring that larger and longer runs are completed on time. Priority is automatically calculated based on factors such as historic runtime, dataset input size, and CSV file size.

Keep Salesforce Data Fresh in Snowflake with Sync Out (Generally Available)

With Sync Out for Snowflake, keep your Salesforce data up to date in Snowflake without the need for a third-party ETL tool. 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 Tableau CRM to Snowflake using the Tableau CRM connector for Snowflake and scheduled Data Sync. This feature is now generally available.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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 Tableau CRM received it from Salesforce, with no additional processing time for augmentation.

How: Enable Sync Out for Snowflake in Analytics Settings in 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.
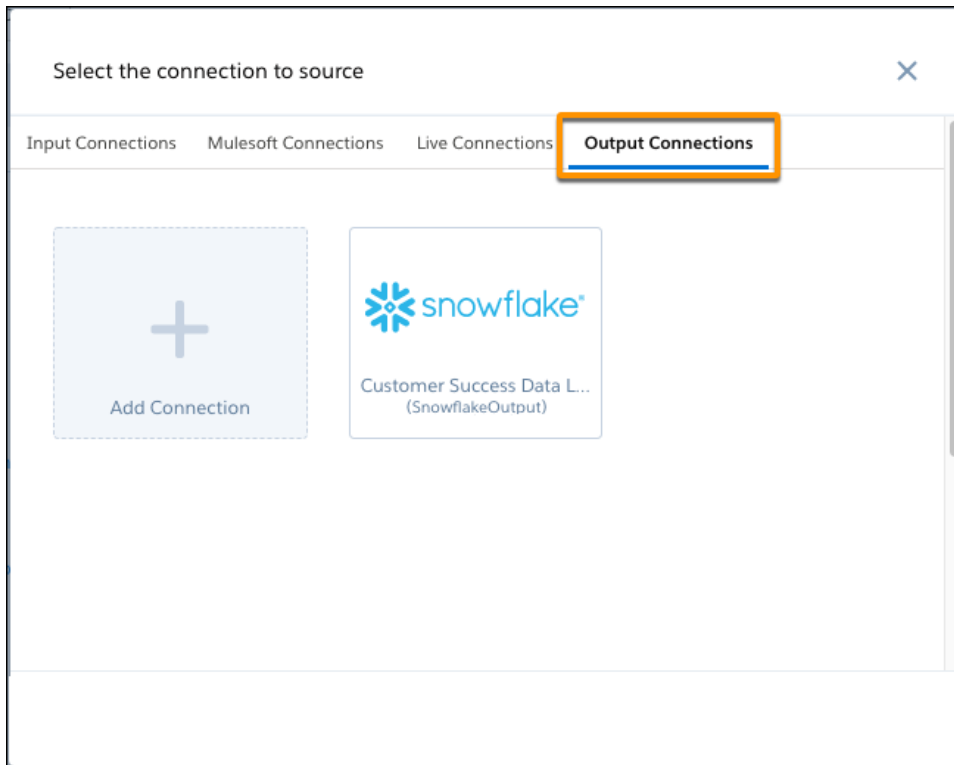
Back on the Connect tab, find the local Salesforce connection with data you want to export to Snowflake. For our example, the SFDC_LOCAL_DAILY connection includes the account object. Select the menu (▼) next to the connection and click **Sync Out**.

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 Tableau CRM, Sync Out then pushes the same account data to Snowflake.

SEE ALSO:

Salesforce Help: Sync Out for Snowflake

Export Datasets to .csv with the Data Prep Output Node

Use the Data Prep output node to save your prepared data from Tableau CRM as a data and schema file. Then you can download the data locally using the public API as a .csv file. This data push lets you transfer augmented, cleaned, and improved data from Tableau CRM into your external systems for analysis, storage, or to inform business processes. For example, export a dataset from Tableau CRM, then download it locally to explore in Microsoft Excel.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Build your recipe with Data Prep. In an Output node, select to write to CSV (1). Enter the name (2) of the user who downloads the file. Optionally, specify the maximum file size and maximum number of rows per partition of the CSV file (3).

Save the recipe. When the recipe runs, Tableau CRM writes the output to the Salesforce database. To retrieve the data from Salesforce, use a tool such as Workbench to find the dataset ID and the Salesforce CLI to download the file. Talk to your Salesforce developer about using these tools.

SEE ALSO:

Salesforce Blogger: Export Your Einstein Analytics Datasets

Merge Prepared Tableau CRM Data into Salesforce with the Salesforce Output Connector (Beta)

Push your prepared dataset Account, Opportunity, and custom object data into any Salesforce org from Tableau CRM with the Tableau CRM Salesforce Output connector and Data Prep. With your prepared data back in Salesforce, you can integrate external data, apply the suite of Salesforce automation tools to act on the data, and allow non-Tableau CRM users access to the data through reports and dashboards.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

> **Note:** As a beta feature, Salesforce Output Connector 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 Salesforce Output Connector in the Tableau CRM Pilot and Beta Connectors group in the Trailblazer Community.

Why: Tableau CRM helps you merge remote data with Salesforce records and use transformations such as predict missing values, sentiment analysis, and clustering for improved analysis and visualization. Now you can use a Data Prep output node with the Salesforce output connector to insert, update, and upsert the augmented data to any connected Salesforce org.

For example, look up and update Account data with external Orders, then push the data back into Salesforce. Use Data Sync to pull Account record data from Salesforce into Tableau CRM, and the Tableau CRM Snowflake Connector to pull Order data from Snowflake. Then use a Data Prep Join node to associate the Order data to Account records and an output node to push the transformed data to Salesforce. In Salesforce, use Process Builder to alert account owners when their order trend is declining.

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 a Salesforce org's information. The org credentials you use determine the connector's access level.
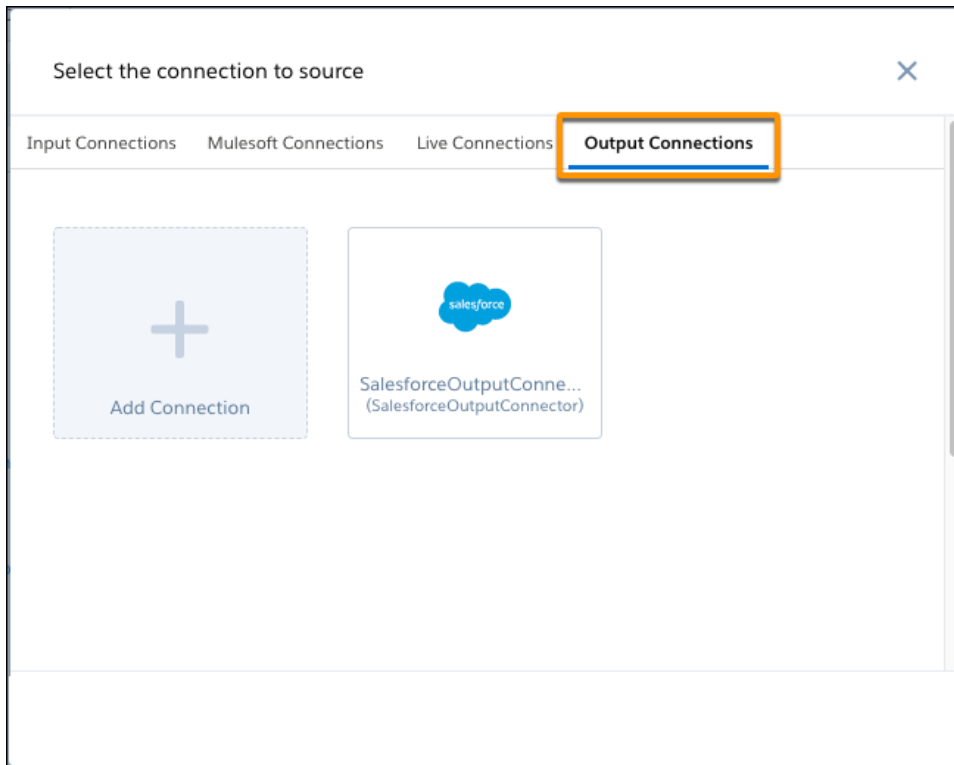
Build your recipe with Data Prep. In our example, look up and update Salesforce account data with external order data. In an Output node, select to write to the Output Connection (1). Select the Salesforce Output connection to push data to (2) and the object to write to (3). Select whether you want the push to UPDATE, INSERT, or UPSERT data (4). Map recipe columns to their equivalent external object columns (5).

Save the recipe. When the recipe runs, Tableau CRM writes the output to the Salesforce org.

SEE ALSO:

   Salesforce Help: Salesforce Output Connection

Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Beta)

Push your prepared data from Tableau CRM into Tableau Online with the Tableau Online Output connector and Data Prep recipes. Your transformed, merged, and cleaned data is pushed to Tableau Online as a .hyper file for further analysis. For example, prepare historical Opportunity data for struggling products in Tableau CRM, and then use Tableau Online's tools to identify helpful trends to optimize deals.

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📝 Note: As a beta feature, the Tableau Online Output Connector 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 the Tableau Online Output Connector in the Tableau CRM Pilot and Beta Connectors group in the Trailblazer Community.

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 Tableau Online account information.
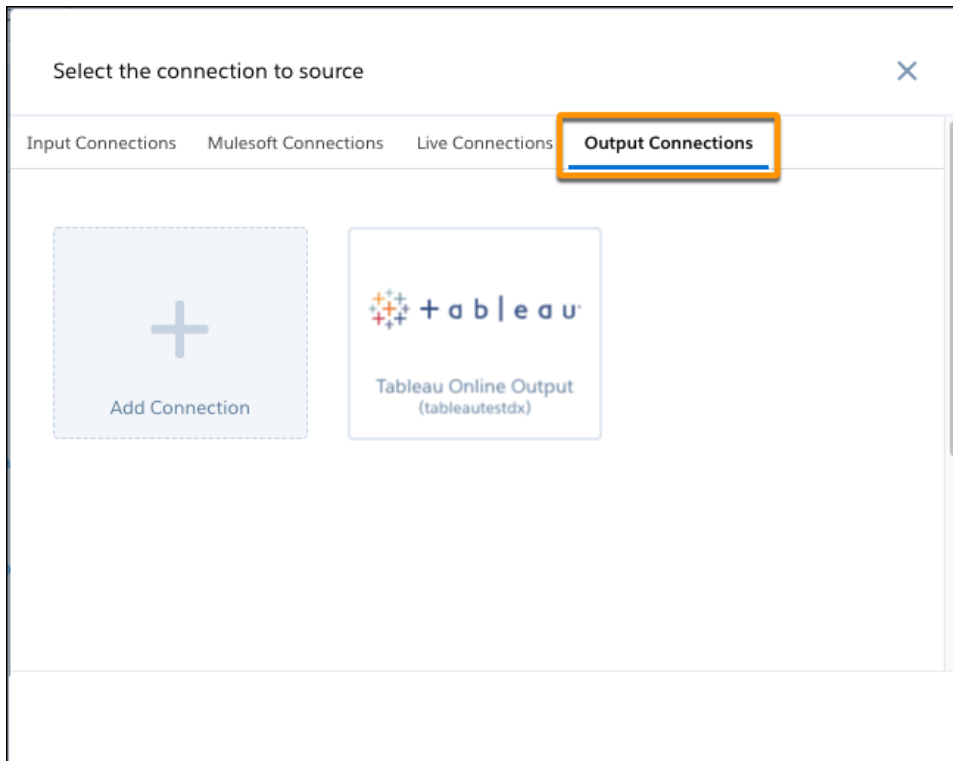
Build your recipe with Data Prep. In an Output node, select to write to the Output Connection (1). Choose the Tableau Online connection to push data to (2). Choose the Tableau Online project to write to as the Object Name (3).

Save the recipe. Each time the recipe runs, Tableau CRM writes the output as an Extract.hyper file within the specified Tableau Online project. From here you can perform extra analysis or augment the Tableau CRM data into your Tableau Online dashboards.
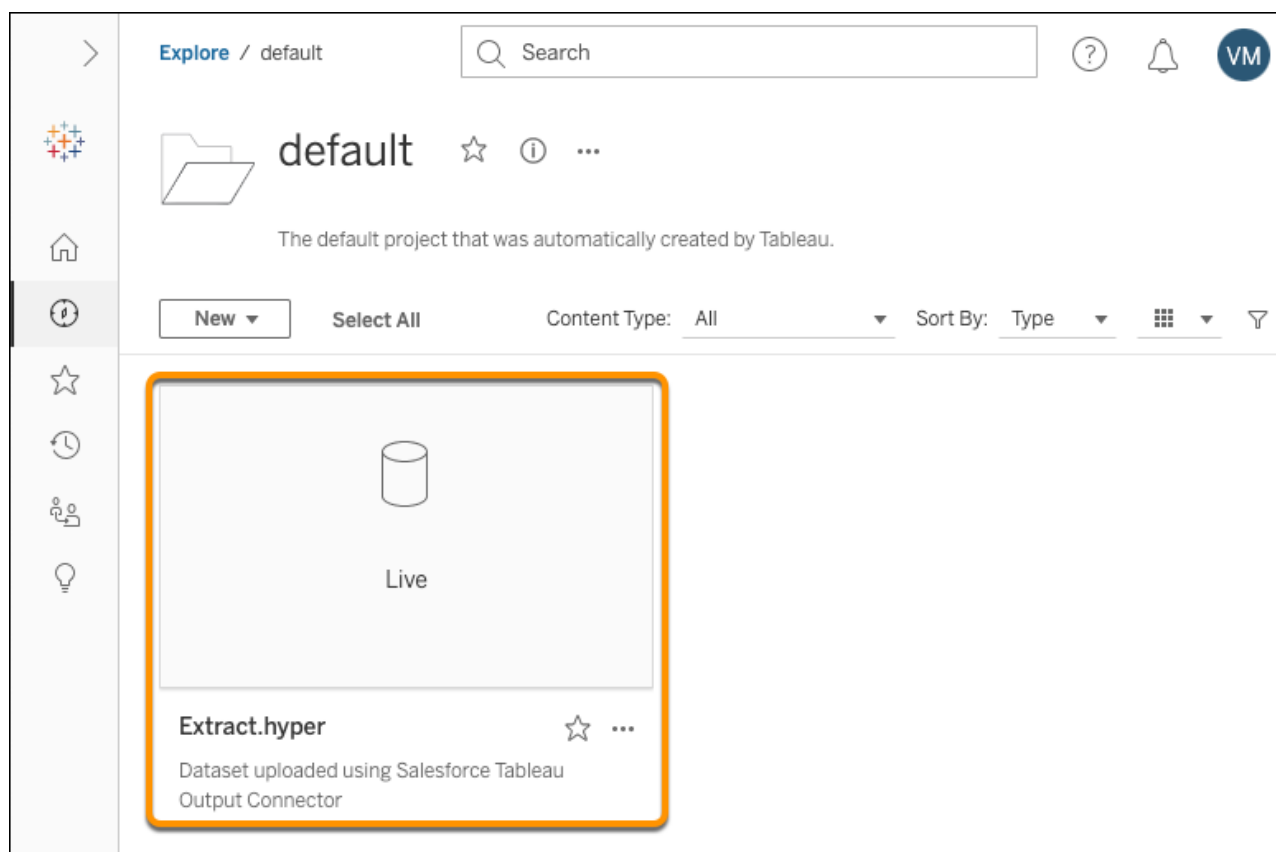
SEE ALSO:

Salesforce Help: Tableau Hyper Output Connection

Tighter Security Encryption Requirements for Connected Data Sources

Tableau CRM is committed to keeping your data safe, so now TLS protocol version 1.2 is enforced for all connections. This TLS protocol version was already supported, but now it's enforced. Source systems that use TLS v1.1 or below can't connect until you reconfigure them.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To confirm or reconfigure your source system's encryption to meet or exceed TLS v1.2, consult your connected system's encryption documentation and configuration. Reconfigure your existing connections to meet this standard if they don't already.

Identify More Candidates for Simplified Row-Level Sharing with the Improved Sharing Inheritance Coverage Assessment

Easily determine which objects and users are good candidates for Sharing Inheritance with the improved Sharing Inheritance Coverage Assessment. Sharing inheritance lets Tableau CRM apply the same sharing setup for your datasets as Salesforce uses for your objects. The Sharing Inheritance Coverage tool now shows your Salesforce org's sharing descriptor limit and the top records or users with more than the limit alongside their sharing descriptor count.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM 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 **Sharing Inheritance Coverage Assessment**. In the Salesforce Objects tab (1), select the object to assess for Sharing Inheritance and click **View Assessment** (2). The top-most records with more than your org's maximum sharing descriptors (3) appear.
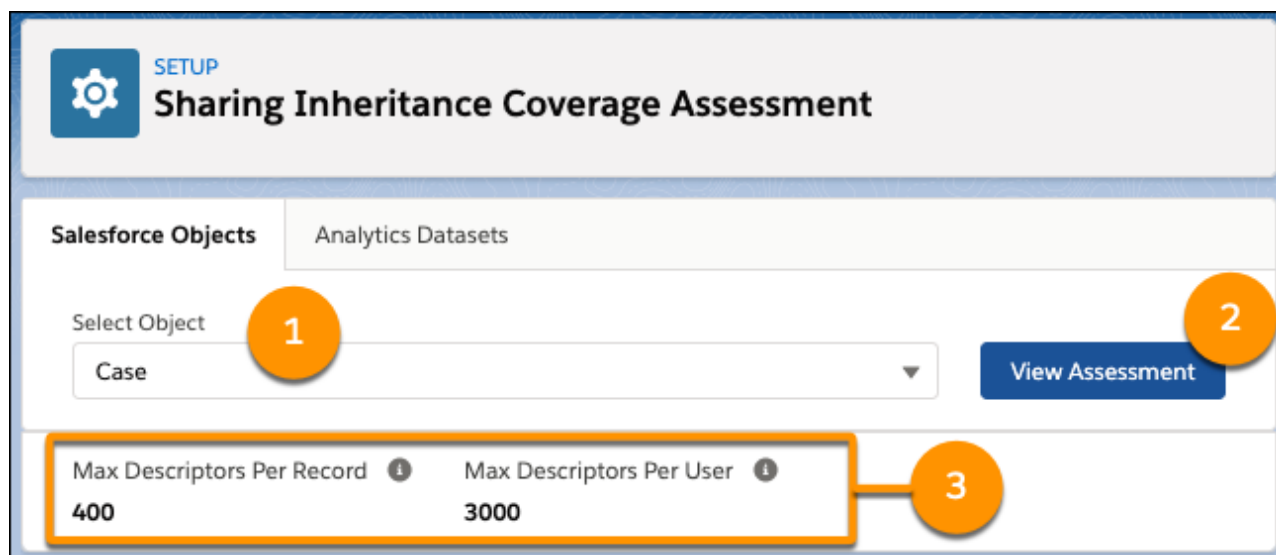
A sharing descriptor is the ID of the user or group that has access to the record. When object records and users have fewer than your org's maximum descriptors, go ahead and apply Sharing Inheritance. If records exceed the limit, depending on your org's sharing strategy flexibility, choose to reduce the number of descriptors per record or contact Salesforce Support to evaluate whether higher limits are an option.

SEE ALSO:

Salesforce Help: Add Row-Level Security by Inheriting Sharing Rules

Perform Calculations Across Rows with Window Functions

For each row in a data source, perform a calculation on a selection—or window—of related rows. Unlike aggregation that groups rows, window functions return a result for each row. For example, you can calculate the changes to the opportunity amount throughout the stages of each opportunity to see if you can hit your sales target. You can use window functions in a Custom Formula transformation of a Data Prep recipe.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Use window functions in custom formulas to perform calculations across rows. For example, you can use window functions to calculate the percentage change in profit each time an opportunity record is updated. The Opportunity History object tracks changes to opportunities over time. When records are sorted in ascending order by date, you can see the history of changes to each opportunity.

Opportunity ↑	Date ↑	Profit	Volume	Stage	Account	Case	Owner	Product
Abbott Inc [1276] - Jan 10	1/10/17	$19,681	68	Qualification	Carroll-Rosenbaum	14	Andy Peterson	Basic Internet
Abbott Inc [1276] - Jan 10	1/12/17	$28,999	65	Proposal	Jaskolski-Simonis	12	John Smith	Basic Internet
Abbott Inc [1276] - Jan 10	1/13/17	$36,804	64	Perception Analysis	Lang, Russel and Abernathy	12	Wes Hardin	Basic Internet
Abbott Inc [1276] - Jan 10	1/13/19	$77,481	284	Won	Skiles Inc	13	Vanessa Central	Basic Internet
Abbott Inc [1276] - Jan 10	1/15/19	$58,674	288	Qualification	Smitham Inc	10	Anne Frost	Basic Internet
Abbott Inc [1276] - Jan 10	1/16/16	$5,547	43	Qualification	Weber-Howell	10	Andy Peterson	Basic Internet

To create a custom formula with window functions, add a Custom Formula transformation to a Transform node in a Data Prep recipe. Enable **Multiple row formula** to use the window functions in your formula. For example, enter the following custom formula to calculate the percentage change in profit.

```
(((current(Profit)-lag(Profit)))/current(Profit))*100
```

Then define the window properties. For example, set Partition By to Opportunity Name, Order By to Last Modified Date, and Sort Direction to Ascending. Based on these settings, the transformation combines all records into partitions (think buckets) based on the same opportunity name. It then sorts the records in each partition in ascending order based on the last modified date. The records must be sorted to determine the profit change since the previous opportunity record update.

When you run the recipe, the first calculation in each partition is null because the lag function is not defined for the first row and no default value was specified. All subsequent values in the partition show the percentage change in profit.

You can use these window functions in a formula.

Window Functions	Description
current	Returns the value from the current record in the partition.
dense_rank	Returns the rank of each record in the partition based on order. Ranks are consecutive—they don't repeat when the values match.
first_value	Returns the value from the first record in the partition.
lag	Returns the value from the previous record in the partition.
last_value	Returns the value from the last record in the partition.
lead	Returns the value from the next record in the partition.
rank	Returns the rank of each record in the partition based on order. Repeats the rank when the values are the same, and skips as many on the next non-match.
row_number	Returns the row number in the partition. Increments by 1 for every row in the partition.

Stay Ahead of the Game with the Smart Transform Pilot Program

Join the Smart Transform Pilot Program to try out all pilot features in Data Prep recipes. The program now includes: Time Series Forecasting transformation, Cluster transformation, and pivot functionality in the Aggregate node. Pilot features can change with each release as existing features become generally available or are retired and new pilot features are added to the program.

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Who: To use the Smart Transform Pilot Program features, you must be assigned the Enable Data Prep Pilot Features user permission and your org must participate in the Smart Transform Pilot Program.

Anticipate the Future with Time Series Forecasting (Pilot)

Time series forecasting lets you make decisions today based on forecasts about tomorrow. Use the Time Series Forecasting transformation in a Data Prep recipe to run forecasts based on historical data. For example, estimate quarterly sales.

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Who: To use the Time Series Forecasting transformation, you must be assigned the Enable Data Prep Pilot Features user permission and your org must participate in the Smart Transform Pilot Program.

How: Before you create a Time Series Forecast transformation, add an Aggregate node to combine the measures for your forecast period. For example, to forecast the total amount and number of opportunities for the next 6 months, add both measures as aggregates (1) and group rows by year and month in the Close Date column (2) in the Aggregate node.
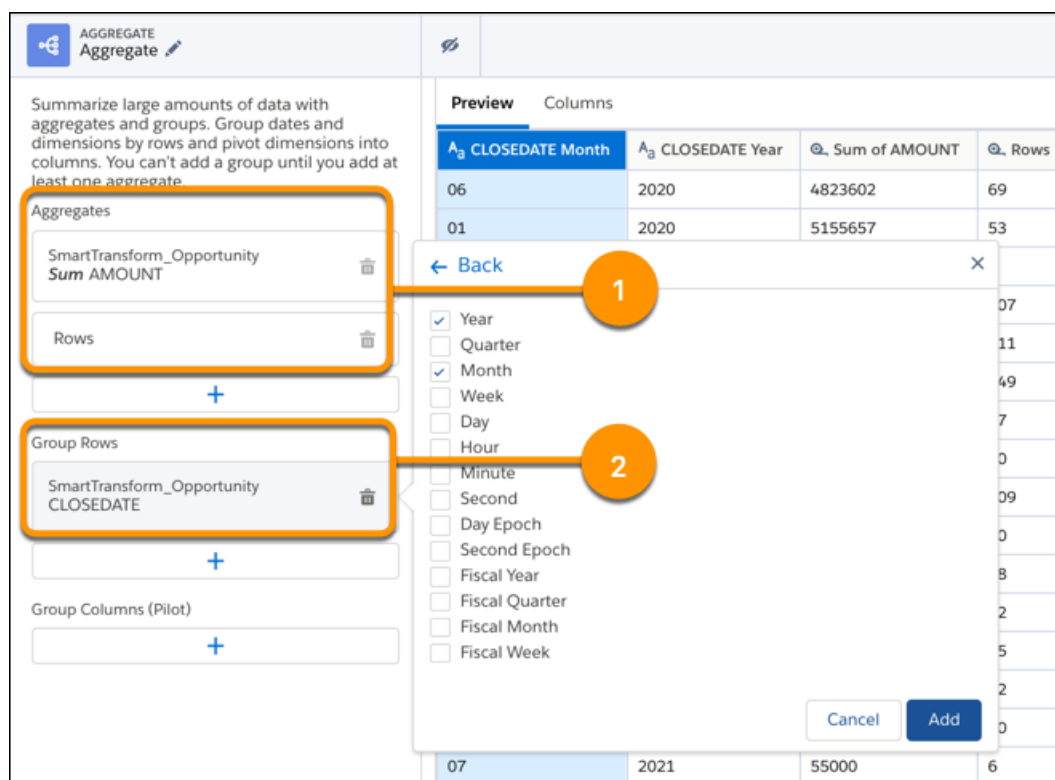
To add a Time Series Forecasting transformation to a Transform node, click the Time Series Forecast button ( ) in the Transform toolbar. Choose the time interval of the timeseries data, such as week or month in the Group Dates By field (1). Then select the dimension columns that identify the related time periods. For example, if you group dates by year-month, select the year and month columns (2). These columns were created by the Aggregate node that you previously created. You can ignore the Seasonality field (3). This feature isn't available yet.

In the Forecast Length field (4), specify the number of periods to forecast. For instance, if you group dates by year-month and set the forecast length to 12, you get predictions for the next 12 months. In Columns to Forecast (5), choose which measure columns to forecast—you can forecast up to five columns.

Then select the forecast model to use in the Model field (6).

- Additive uses Holt-Winters Additive method. Use this method when the seasonal variations are roughly constant throughout the series.

- Multiplicative uses Holt-Winters Multiplicative method. Use this method when the seasonal variations change proportionally to the average (level of the series).

If the data in the last period is incomplete, meaning the period isn't over yet, select **Ignore Last Time Period** (7). If you use incomplete data, the forecast can be misleading.

Run the recipe to see the forecasts. Each forecast column shows the results for every time period. In the example, the Rows Forecast and the Sum of Amount Forecast columns show the forecasts. If needed, you can use the Coalesce function to combine the forecasts for future periods with actual measures in a single column, as shown here.

CLOSEDATE Month ↑	CLOSEDATE Year ↑	Rows	Rows Forecast	Actual and Forecasted Rows	Date	Sum of AMOUNT	Sum of AMOUNT Forecast	Actual and Forecasted Amounts
02	2021	48	210	48	2021-01-01	2,204,520	1,440,218	2204520
03	2021	25	113	25	2021-02-01	1,328,893	-8,648,451	1328893
04	2021	10	62	10	2021-03-01	180,000	-1,623,855	180000
05	2021	10	33	10	2021-04-01	149,000	-1,344,426	149000
06	2021	10	22	10	2021-05-01	163,000	-192,907	163000
07	2021	12	18	12	2021-06-01	181,000	102,906	181000
08	2021	6	17	6	2021-07-01	55,000	182,742	55000
09	2021	15	13	15	2021-08-01	185,696	-44,406	185696
10	2021	6	17	6	2021-09-01	100,000	268,489	100000
11	2021	7	13	7	2021-10-01	86,000	49,381	86000
12	2021	0	12	12	2021-11-01	0	64,376	64376
01	2022	0	15	15	2021-12-01	0	42,753	42753
02	2022	0	18	18	2022-01-01	0	21,129	21129
03	2022	0	21	21	2022-02-01	0	-494	-494
04	2022	0	24	24	2022-03-01	0	-22,118	-22118
04	2022	0	27	27	2022-04-01	0	-43,741	-43741

Note: When you run the recipe, to produce forecasts for each period, the transformation fills in missing time period rows behind the scenes, entering 0 for forecasted columns and null for other columns.

Find New Ways to Segment Your Data with Clustering (Pilot)

To segment rows of data into distinct clusters based on common characteristics, use the Cluster transformation in a Data Prep recipe. For example, you can cluster accounts based on account industry, rating, number of employees, and annual revenue. Using the clusters, you can identify products and services to upsell to each account based on other accounts in the same cluster.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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Who: To use the Cluster transformation, you must be assigned the Enable Data Prep Pilot Features user permission and your org must participate in the Smart Transform Pilot Program.

How: To add a Cluster transformation to a Transform node in a Data Prep recipe, click the Cluster button ( ). To set up the transformation, enter the number of clusters and the columns—measures or dimensions—used to determine clusters.

For example, to segment accounts, you can create three clusters based on the account industry, rating, number of employees, and annual revenue.

After you run the recipe, each account is assigned a cluster.

Account Cluster	Account Name	Number of Employees	Annual Revenue	Industry ↓	Rating
Cluster 1	US Wirefree	112,327	1,350,000,000	Utilities	Hot
Cluster 1	Tru Vue	71,721	1,110,000,000	Utilities	Cool
Cluster 1	Softura	100,997	1,500,000,000	Utilities	Hot
Cluster 1	Bbk Holding Company	103,478	1,440,000,000	Utilities	Warm
Cluster 2	Internap	38	5,150,000,000	Utilities	Warm
Cluster 2	Vertical Venture DOT Co	153	5,030,000,000	Utilities	Hot
Cluster 2	Digicon Imaging	61	6,530,000,000	Utilities	Warm
Cluster 2	Springer-Miller Systems	8,986	8,630,000,000	Utilities	Cool

The clustering algorithm determines clusters based on the collective set of values from the selected columns. For example, accounts with the same industry and rating can be placed in different clusters if the number of employees and annual revenues don't fall into the same ranges determined by the algorithm.

You can then build a dashboard to gain insights about accounts in each cluster. For example, although Cluster 3 has the highest average annual revenue (about $40 billion), only three accounts are in that cluster. If no insights jump out based on the clusters, you can create a different set of clusters to look at other key characteristics, such as products purchased and opportunity types.

Analyze Aggregated Data from More Angles with Pivoting (Pilot)

Use pivoting to group important metrics by dimensions in columns. For example, you can group each country's total revenue by account type to analyze revenue for each combination of country and account type. To pivot dimensions as columns, use the Aggregation node in a Data Prep recipe.

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Who: To use the pivot feature in an Aggregate node, you must be assigned the Enable Data Prep Pilot Features user permission and your org must participate in the Smart Transform Pilot Program.

How: Use pivoting to segment aggregated rows by more dimensions. For example, you aggregated average opportunity amount by country and want to add account type.

To segment the average amount by account type, add the Account Type in the Group Columns (Pilot) field of the Aggregate node. Each value of the dimension appears as a separate column.

Data Prep names the pivoted columns based on the aggregates and group column values—in this example, Customer_Average Amount and Partner_Average Amount. Using the pivot table, you can quickly compare customer and partner metrics for each country. You can also sort by each measure to determine which country generates the highest average amount for customers and partners.

Consider these rules when using the pivot feature in the Aggregation node:

- You must add at least one aggregate before you can add a grouping.

- You can add up to two columns in the Group Columns (Pilot) field.

- Because pivoting increases the number of columns, keep in mind that the Aggregate node can create up to 5,000 columns. If the node exceeds the maximum, you can reduce the number of columns by changing the aggregates or row and column groupings.

Clean Up Your Data by Standardizing Column Value Formats

When you integrate data with a Data Prep recipe, column values can have inconsistent or unwanted formats. You can now set the precision and scale for measure columns, character length for dimension columns, and date formats for date columns in the following transformations: Edit Attributes, Dimension to Measure, Measure to Dimension, and Formula.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: For example, you create a Data Prep recipe to clean up your employee data. To convert the Salary column type from dimension to measure, you add the Dimension to Measure transformation.

To set the digits after the decimal, click the Column Attributes box and set Scale to 0.

Append Rows from Disjoint Data Sources

Now you can append data that has different columns than what's in the recipe. When you stack rows from different sources using an Append node, sometimes columns in one source don't exist in the other. The Append node in a Data Prep recipe now supports columns from the right data source that don't exist in the left.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: When setting up an Append node, you map columns from the right source to the left. To include a column from the right that doesn't exist in the left, click **+** (below the mapped columns) to add a column mapping and then add the right column. Leave the left column blank.

In this example, you're appending legacy sales data, which has a Total column, to your current sales data, which doesn't have a Total column.

For the unmapped column, the Append node inserts either nulls or zeroes, depending if null measure handling is enabled, for all rows coming from the left source. In this preview, zeros are inserted for the left rows.

Other Enhancements to Data Prep

Prevent API name conflicts when you join data and get up to speed with the preview change for Input nodes.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Check out these feature updates.

- To prevent API name conflicts between columns in the left and right data sources of a Join node, enter a prefix. The Join node applies the prefix to columns from the right data source.

- When you add an Input node to a Data Prep recipe, all columns after the first 100 are hidden from preview, by default. If needed, you can unhide them to preview them.

Run Recipes and Dataflows Smarter with Priority Scheduling

Do your smaller recipe or dataflow runs often wait for lengthier runs to finish? Priority scheduling for recipes and dataflows automatically manages your run queue. It prioritizes smaller and faster runs while ensuring that larger and longer runs are completed on time. Priority is automatically calculated based on factors such as historic runtime, dataset input size, and CSV file size.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Priority scheduling is most helpful to smooth out occasional queue-time spikes. If you never or frequently see long queue times, then priority scheduling isn't as helpful. Activate the feature in advance to manage your queue, not during a problem when your queue is already overloaded. This feature doesn't increase your maximum number of concurrent runs.

For example, you schedule three recipes to run at the same time. One is larger with more rows and runs for 30 minutes. The other two are smaller with fewer rows and run for three minutes. The larger recipe's run request arrives a millisecond before the shorter requests. Without priority scheduling, requested runs are queued first in, first out, so the smaller runs wait 30 minutes until the larger run finishes. With priority scheduling, the smaller recipes execute first because of their shorter run time, followed by the larger run. If higher-priority runs continue to queue in front of the longer run, the queue temporarily switches to first in, first out an hour after the scheduled request.

How: From Setup, in the Quick Find box enter `Analytics`, select **Settings**, and then select **Priority Scheduling for Dataflows**. You can disable the feature at any time to return to a first in, first out queue.

Analytics Prebuilt Templates and Apps

Streamline building your apps, dashboards, and stories with a Tableau CRM template specific to your industry. Get more insights into your team's activities in Revenue Operations dashboards, explore top drivers with Einstein Discovery modeling, improve branch retail bank performance using the branch management dashboard, and drive customer retention with the new Analytics for Loyalty and Rebate Analytics apps.

IN THIS SECTION:

Review Your Team's Activities to Support Better Win Rates

The new Activity Intelligence dashboard in the Revenue Operations Analytics app shows your team's activities, pipeline, and closed deals. The dashboard shows you which team members are falling behind and need coaching. You can see details about individual performance and the status of opportunities in the pipeline, sorted by size. Then you can target the activities for the team member to improve upon and secure the best possible win rate.

Win More Accounts With Einstein Discovery Modeling

The Revenue Operations Analytics app now generates an Einstein Discovery model to recommend ways to maximize your sales team's win rates. This model contains insights on the top revenue drivers—the factors that have top positive and negative impacts on the forecast. You can modify the model to better understand what activities support your win rates.

Focus Your Sales Efforts By Understanding the Top Revenue Forecast Drivers

To target your sales efforts, you can view the top positive and negative drivers that affect sales forecasts in the Revenue Operations Analytics app's new chart. When you understand the factors that affect your forecasts, you can better predict activities that can generate revenue. For example, if positive forecasts are closely correlated with Enterprise accounts and negative forecasts are closely associated with new accounts, you know to focus efforts on Enterprise accounts.

SEE ALSO:

Choose from Account Types in the Analytics for Healthcare App

Improve Branch Operations in the Analytics for Retail Banking App

Create Apps with or without Lead History

Analyze Households and Uncover Cross-Sell Opportunities

Set Up Predictions Faster

Drive Client Engagement with Life Event Insights

Improve Member Engagement with Einstein Discovery for Loyalty

Analyze Customer Loyalty and Grow Your Business

Monitor Store Price Compliance with Analytics for Consumer Goods

Analyze Rebate Programs and Boost Your Business with Rebate Analytics

Monitor Engagement Channel Performance and Improve Customer Experience

Review Your Team's Activities to Support Better Win Rates

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Tableau CRM Analytics Studio, click **Create** and select **App**. Find and select **Revenue Operations Analytics**, and then follow the instructions in the wizard to create your app. After the Revenue Operations Analytics app is created, open the new **Activity Intelligence** dashboard to view charts and data on your Sales team's account activities as they relate to win rate. Activities include calls, emails, events like scheduled meetings, and tasks like reminders.

If you have an existing Revenue Operations Analytics app, you can upgrade to view the new functionality. To upgrade your app, from the Tableau CRM home page, click **New version available**, and then follow the wizard's instructions. Note that upgrading an app removes any customizations you made.

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The Revenue Operations Analytics app now generates an Einstein Discovery model to recommend ways to maximize your sales team's win rates. This model contains insights on the top revenue drivers—the factors that have top positive and negative impacts on the forecast. You can modify the model to better understand what activities support your win rates.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Tableau CRM Analytics Studio, click **Create** and select **App**. Find and select **Revenue Operations Analytics**, and then follow the instructions in the wizard to create your app. The app creation includes the generation of a Likelihood to Win Einstein Discovery story to model how to maximize win rates. If you have an existing app, we recommend you create a new Revenue Operations Analytics app.

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To target your sales efforts, you can view the top positive and negative drivers that affect sales forecasts in the Revenue Operations Analytics app's new chart. When you understand the factors that affect your forecasts, you can better predict activities that can generate revenue. For example, if positive forecasts are closely correlated with Enterprise accounts and negative forecasts are closely associated with new accounts, you know to focus efforts on Enterprise accounts.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Powered by the new Likelihood to Win Einstein Discovery model, the **Revenue Operations** dashboard displays the predicted forecast insights for sales team members. To see the new **Top Drivers** widget, click **View Forecast** to see individual metrics. The widget shows you the top three drivers that affect a team member's positive and negative forecasts.
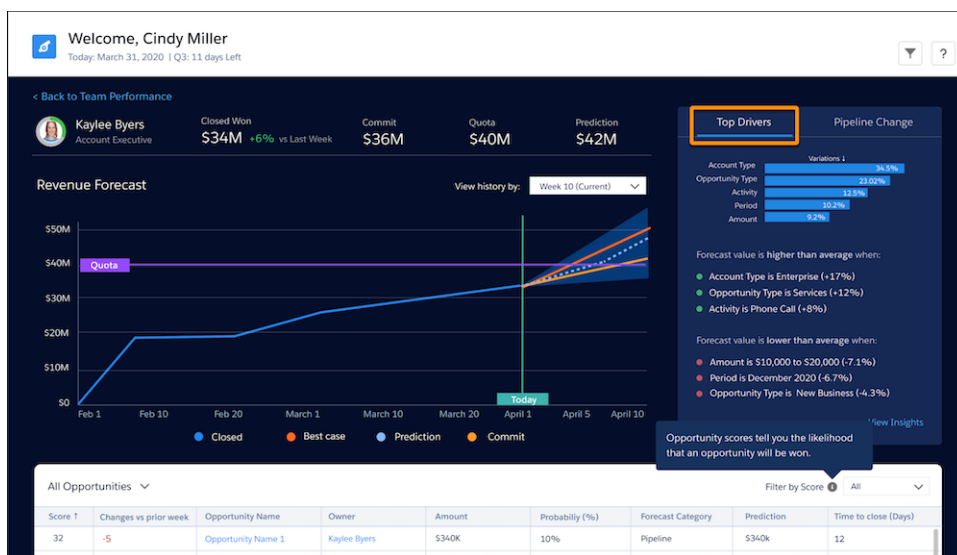
Analytics App Building

Streamline dashboard building with reusable components (generally available), make data more actionable with configurable actions and mass actions, and add custom details to number widgets without cluttering your dashboard.

IN THIS SECTION:

Be the Boss of Building Dashboards with Reusable Components (Generally Available)

Dashboard components are a type of widget that can contain other widgets and pages. They make it easy to reuse and manage groups of charts, tables, filters, text, and more in multiple dashboards. This feature is now generally available.

Add Custom Text and Visualizations in Number Widget Tooltips

Want to see additional information on KPIs while keeping dashboards clutter-free? A number widget's tooltip can now include dynamic text and a visualization so you see more details when you hover over important business metrics in a dashboard. For example, on a number widget showing total revenue, add a chart to the tooltip that breaks down revenue by industry and dynamic text to highlight the top-performing industry.

Take Action Anywhere on Any Data on up to 100 Records at Once

As you create interactive data tables, you imagine your users taking a quick action like open record or log a call on various columns. Previously, you identified the data source or query owner for the table and asked them to configure custom actions, but you can now configure the action yourself even if you only have view access to the data. Configuring actions anywhere combines with the one-click action feature to give your data instant actionability. You can also enable users to perform mass actions on up to 100 records at once. For example, enable sales managers looking at a list of team opportunities to click to receive alerts on all records that are past their close date.

Use SQL with Tableau CRM Direct Data (Beta)

To extend analysis on your Snowflake data and uncover more insights, you can now run SQL queries on live datasets. Write SQL queries to calculate common business cases such as Cost to Revenue Ratio, apply advanced sorting to your data, and work with windowing function formulas.

Group Data by up to Six Fields in Explorer

Analyzing large datasets sometimes requires more data groups. You can now group your data by up to six dimensions or date fields in explorer charts and tables. Previously, you edited SAQL queries or JSON files to include more than four groupings for your data.

If you're familiar with Structured Query Language (SQL), make yourself at home with Tableau CRM (formerly Einstein Analytics)'s own version of SQL for Tableau CRM (beta). In SAQL, you can match single characters and patterns found anywhere in a string with the new `like` operator and select a random subset of your dataset with the `sample` keyword.

Be the Boss of Building Dashboards with Reusable Components (Generally Available)

Dashboard components are a type of widget that can contain other widgets and pages. They make it easy to reuse and manage groups of charts, tables, filters, text, and more in multiple dashboards. This feature is now generally available.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Create and Manage Dashboards with Reusable Dashboard Components (can be outdated or unavailable during release preview)

Add Custom Text and Visualizations in Number Widget Tooltips

Want to see additional information on KPIs while keeping dashboards clutter-free? A number widget's tooltip can now include dynamic text and a visualization so you see more details when you hover over important business metrics in a dashboard. For example, on a number widget showing total revenue, add a chart to the tooltip that breaks down revenue by industry and dynamic text to highlight the top-performing industry.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In this example, with the total revenue number widget selected in the dashboard, select **Custom** in the tooltip section of the widget properties panel (1). To include a chart, click **Create Visualization** (2). After selecting the Account dataset, create a horizontal bar chart that shows the Sum of Revenue by Industry in descending order (3). To showcase the industry with the highest revenue in the tooltip, click **Add Query Data** (4). After selecting the Industry query as the data source, set **Industry** as the field to reference in the tooltip's custom text (5).

Note: By default, the initial selections and filters on a tooltip's visualization match the ones in the associated number widget.

Click **Preview** to verify that the tooltip appears correctly and then save your changes.

Take Action Anywhere on Any Data on up to 100 Records at Once

As you create interactive data tables, you imagine your users taking a quick action like open record or log a call on various columns. Previously, you identified the data source or query owner for the table and asked them to configure custom actions, but you can now configure the action yourself even if you only have view access to the data. Configuring actions anywhere combines with the one-click action feature to give your data instant actionability. You can also enable users to perform mass actions on up to 100 records at once. For example, enable sales managers looking at a list of team opportunities to click to receive alerts on all records that are past their close date.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To add a custom action menu to a dimension column in Explorer, click the column action menu for the dimension, and select **Configure Actions**.
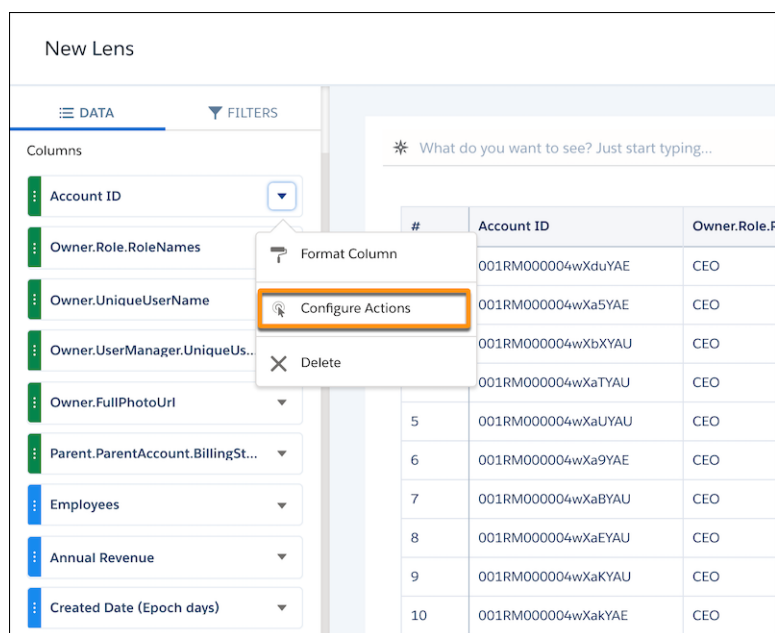
Configure the actions for the dimension, selecting the ID, display fields, and the actions. Then click **Done** and save your lens.
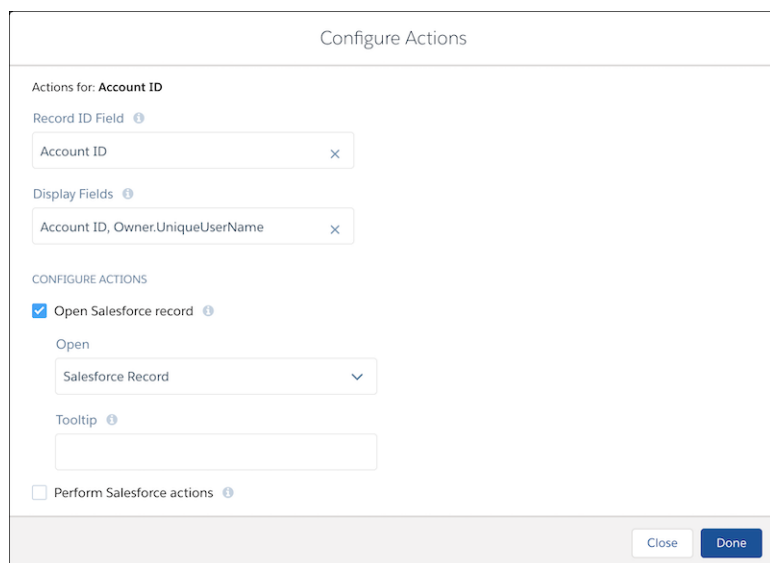
Next, enable your dashboard users to take quick action on up to 100 records in the configured column at the same time by adding mass quick actions. Add a values table (1) with actionable data, a faceted chart or filter (2), and a link widget (3) to your dashboard. In the widget properties panel for the link widget, name your link with text that matches the quick action (4). Select **Mass Action** in the **Link To** list (5). Select the name of the table query in the step list (6). Select the column name to apply the mass quick action to in the **Action Column** list (7). Then select the mass quick action to perform in the **Salesforce Actions** list (8).

In this example, the mass quick action is to update accounts. When the user selects an account type in the faceted chart and then clicks the **Update Account** link, they can update all the accounts of that type, up to 100 records, using the account ID from the table query.

Use SQL with Tableau CRM Direct Data (Beta)

To extend analysis on your Snowflake data and uncover more insights, you can now run SQL queries on live datasets. Write SQL queries to calculate common business cases such as Cost to Revenue Ratio, apply advanced sorting to your data, and work with windowing function formulas.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

> 📝 Note: As a beta feature, SQL for Tableau CRM Direct Data 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.

How: To enable SQL for Tableau CRM Direct Data, from Setup, in the Quick Find box, enter `Analytics`, and then select **Settings**. Select **Enable SQL for live datasets (Beta)**, then click **Save**.

To create SQL queries for a live dataset, in Tableau CRM Analytics Studio, open the dataset, and click Query Mode (1). Edit the SQL query and click **Run Query** to validate it (2). To add the query to a dashboard, clip the query lens to the dashboard (3).
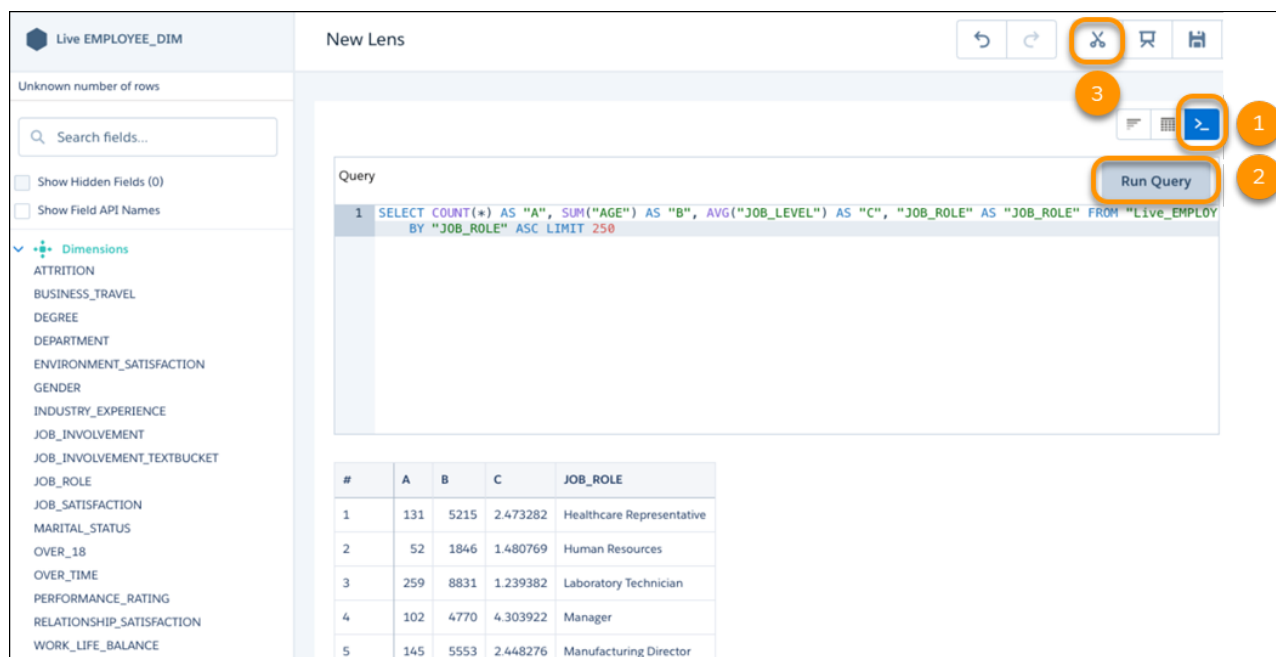
SQL for Tableau CRM Developer Guide: Introducing SQL for Tableau CRM (Beta)(can be outdated or unavailable during release preview)

Group Data by up to Six Fields in Explorer

Analyzing large datasets sometimes requires more data groups. You can now group your data by up to six dimensions or date fields in explorer charts and tables. Previously, you edited SAQL queries or JSON files to include more than four groupings for your data.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

IdeaExchange: Allow Compare Tables to Have More Than Four Groupings

What's New In SAQL

If you're familiar with Structured Query Language (SQL), make yourself at home with Tableau CRM (formerly Einstein Analytics)'s own version of SQL for Tableau CRM (beta). In SAQL, you can match single characters and patterns found anywhere in a string with the new `like` operator and select a random subset of your dataset with the `sample` keyword.

IN THIS SECTION:

Fast-Track Your Queries With SQL for Tableau CRM (Beta)

Execute queries on your datasets with Structured Query Language (SQL) tailored for Tableau CRM. SQL is typically used for working with data stored in relational databases—perhaps you're familiar with variants like MySQL and PostGreSQL. Our version runs on Tableau CRM datasets and has native support for Salesforce features such as sharing inheritance and custom fiscal calendars.

Sometimes you don't want to run a query on your entire dataset. Instead you can select a random subset of your dataset that can stand in for the distribution of the whole. With Salesforce Analytics Query Language's (SAQL) new random sampling functionality, the `sample` keyword, you can project a query on a representative sample from your dataset. One use case for random sampling is creating a training sample for a machine learning model. A small data sample can provide a more accurate preview of the whole dataset than the first 100 rows, for example.

With Salesforce Analytics Query Language's (SAQL) `like` comparison operator, you can match single characters and patterns found anywhere in a string.

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Note: As a beta feature, SQL for Tableau CRM 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..

Why: SQL is the most common industry standard for manipulating data. If you're familiar with the syntax, expect to feel right at home with SQL for Tableau CRM. It has most of the same functionality, but if your queries require unsupported features, use SAQL, our proprietary query language.

How: To enable SQL for Tableau CRM, contact your Support representative. To use SQL for Tableau CRM in Analytics Studio, open a Lens on a dataset, and click the **Query Mode** button.
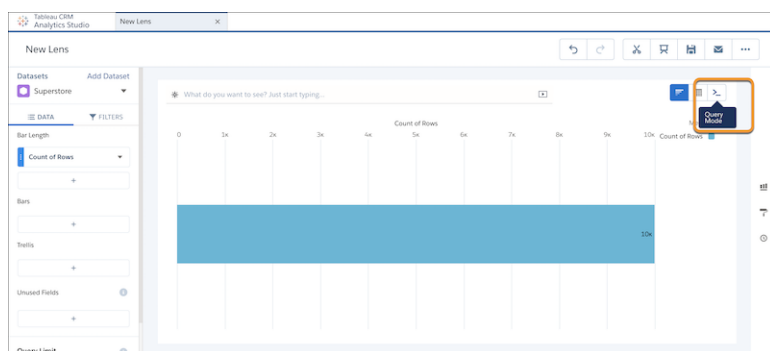
SAQL is the default query language. To switch to SQL, click **Switch to SQL**.
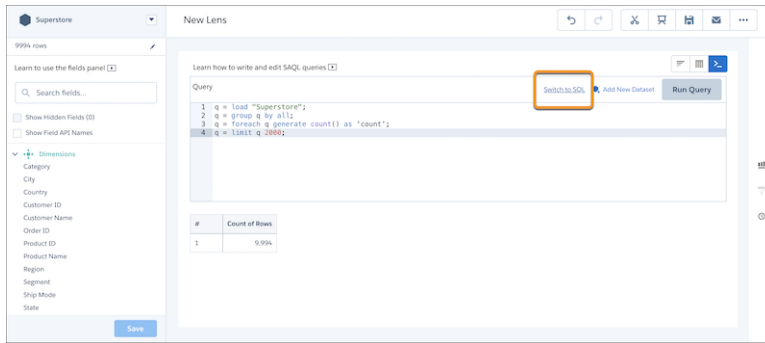
Switching to SQL provides a warning that switching clears your current query. If you don't want to lose the SAQL query, copy it. Then click **Switch to SQL**.
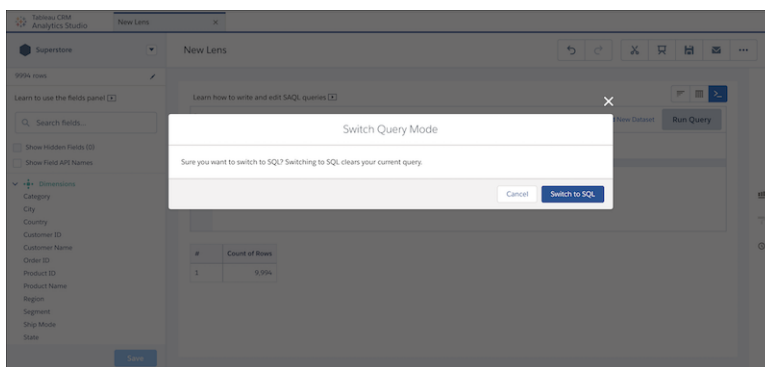
The default query for SQL is the row count in your dataset. Let's update the query to count the number of times a category occurs for each city. Because we limit the results to 10 rows, the results display the first 10 cities in the furniture category.
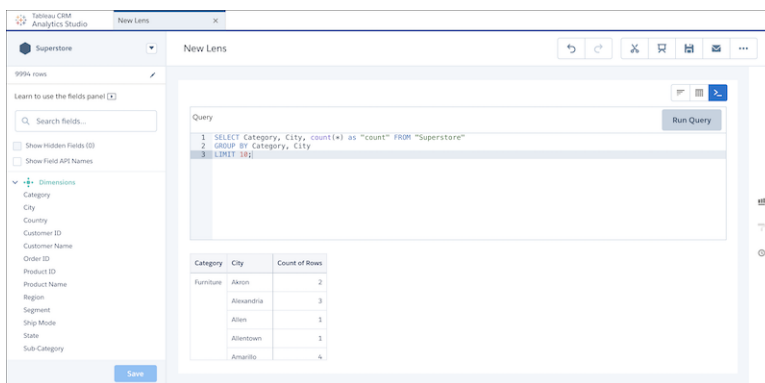

```
SELECT Category, City, count(*) as "Count"
FROM "Superstore"
GROUP BY Category, City
LIMIT 10;
```

Category	City	count
Furniture	Akron	2
	Alexandria	3
	Allen	1
	Allentown	1
	Amarillo	4
	Anaheim	8
	Andover	1
	Apopka	1
	Apple Valley	2
	Arlington	13

SEE ALSO:

Create Training Data Easily with Random Sampling in SAQL

Sometimes you don't want to run a query on your entire dataset. Instead you can select a random subset of your dataset that can stand in for the distribution of the whole. With Salesforce Analytics Query Language's (SAQL) new random sampling functionality, the `sample` keyword, you can project a query on a representative sample from your dataset. One use case for random sampling is creating a training sample for a machine learning model. A small data sample can provide a more accurate preview of the whole dataset than the first 100 rows, for example.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: `sample` follows this syntax:

```
sample(percentage-size-of-dataset) repeatable(seed)
```

Include the `sample` keyword after the `load` statement in your query. Any operation performed on the query after the `load` statement affects only the random sample of data. To specify a seed, follow `sample` with the optional `repeatable` keyword. Passing the seed value to `repeatable` returns the same subset of data each time you pass `repeatable` the same seed value. The seed value can be any positive integer.

Let's look at an example.

```
q = load "Opportunity" sample(10) repeatable(1);
q = group q by all;
q = foreach q generate count() as 'Count';
q = limit q 2000;
```

Count of Rows
453

The query returns the row count of the sample, which at 453 is roughly 10% of the dataset's 4,600 rows.

`sample` uses the Bernoulli algorithm, where each row has an equal probability of being selected. Since each row is individually considered, the number of rows returned in a given sample can vary slightly each time you run the query. The `repeatable` keyword guarantees that the query always returns the same result. If you modify your dataset and add more data, then `repeatable` doesn't return the same result.

SEE ALSO:

Tableau CRM SAQL Reference: `sample` (can be outdated or unavailable during release preview)

Fine-Tune Pattern Matching with SAQL's `like` Operator

With Salesforce Analytics Query Language's (SAQL) `like` comparison operator, you can match single characters and patterns found anywhere in a string.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To match any single character in the string, include an underscore (_). For example, `_b_` matches any character, followed by the character "b," followed by another single character. `_lb` matches any single character followed by "lb." To match any sequence of zero or more characters, include a percent sign (%). To match a sequence anywhere in a string, the pattern must start and end with a percent sign.

To match a literal underscore or percent sign in a pattern, escape the pattern string with a backslash (\).

Let's look at a few examples.

This example checks whether a customer name contains the pattern "ni." If the string contains the pattern, then like evaluates to True and the query returns the name.

```
q = load "Superstore";
q = filter q by Customer_Name like "%ni%";
q = group q by Customer_Name;
q = foreach q generate Customer_Name as 'name';
q = limit q 5;
```

name
Annie Thurman
Annie Zypern
Benjamin Venier
Berenike Kampe
Chad Cunningham

This query returns city names that contain any single character preceding the pattern "lb" and zero or more characters after it.

```
q = load "Superstore";
q = filter q by City like "_lb%";
q = group q by City;
q = foreach q generate City as 'city';
```

city
Albuquerque

With one underscore, the query returns Albuquerque. If we precede the pattern with two underscores, the query returns results that have any two characters before the pattern "lb."

```
q = load "Superstore";
q = filter q by City like "__lb%";
q = group q by City;
q = foreach q generate City as 'city';
```

city
Gilbert
Melbourne

SEE ALSO:

Tableau CRM SAQL Reference: Comparison Operators (can be outdated or unavailable during release preview)

Einstein Discovery

Navigate insights seamlessly with Einstein Discovery's new story interface, get predictions in datasets using Data Prep recipes, and predict outcomes using externally-built models that you upload and deploy into Salesforce.

IN THIS SECTION:

Discover More Insights with a Reimagined, Intuitive Interface

Navigating through insights and model metrics has never been easier with the new interface for Einstein Discovery and Einstein Data Insights. The features you know and rely on are all still there, just easier to find and use. As you open story insights, you're welcomed with AI-powered insights right in front of you. The streamlined story interface makes your insights more discoverable than ever, with features such as comparing story versions at a glance, revealing potentially overlooked insights.

Embed Predictions in Your Dataset During Data Prep (Generally Available)

Populate your datasets with predictive and prescriptive intelligence using the Discovery Predict transformation for Data Prep recipes. When you run a recipe with a Discovery Predict node, Einstein calculates and saves predicted outcomes on a row-by-row basis. You can even store descriptions of top predictors and improvements. For example, a Data Prep recipe can save predicted win rates, top factors, and ways to improve win rates in a dataset for direct-to-dashboard visualization. With the Discovery Predict node, you can quickly evaluate predictions across a large set of data, assess multiple models before deploying them into production, and aggregate this information in a dashboard.

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 powerful models that Einstein Discovery builds from your stories, you can now upload and deploy TensorFlow or Python models that are created outside of Salesforce. Your data scientists can use their favorite modeling tools to design, build, test, and tune their carefully-crafted models. Then, simply upload and deploy them into your Salesforce org. Your users are up and running quickly, and using the model's predictions to achieve better outcomes.

Gain Better Insights Into Your Report Data with Enhanced Einstein Data Insights

With improvements to Einstein Data Insights, it's easier than ever to unleash the power of AI and comprehensive statistical analysis on your report data. Einstein now prevalidates your report before you analyze to ensure that it contains the minimum number of columns and rows needed to conduct a meaningful analysis. The all new, streamlined interface helps focus your exploration by featuring the report columns that are most highly correlated to your goal. Select columns or filters to quickly traverse the Einstein Discovery-powered insights that you want to investigate. And when your report data is refreshed, you can update your analysis on demand.

Package, Promote, and Distribute Your Predictions

With packaging support, Einstein Discovery makes your models more portable and shareable than ever before. Now you can build and test your model in a sandbox environment and, when it's production-ready, promote it to your production environment using change sets. You can also build and train models using your own data, then distribute them to others—within or outside your company—using managed or unmanaged packages. That way, customers enjoy the benefits of your models' predictions and improvements without needing the data to train the models themselves. Einstein Discovery supports both first-generation packaging (1GP) and second-generation packaging (2GP).

Build Accurate Models Using Random Forest Algorithms (Generally Available)

Einstein Discovery adds a fourth type of model based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models through multiple decision trees, randomization, and other optimization techniques. Create a story with a random forest model, then compare its metrics with other types of models to determine whether this algorithm provides better accuracy for your story.

Maintain Model Accuracy With Performance Notifications

For even the best-designed models, performance can decline over time. Models drift when characteristics in the real world data diverge significantly from the training data used to build them. The result? Prediction accuracy drops, which can adversely affect the business decisions that depend on those predictions. Prediction notifications alert you to when it's time to retrain your model with more recent data that reflects current circumstances. Then you can take corrective action to get your drifting models back on course.

Increase Prediction Transparency with Model Cards (Pilot)

Einstein Discovery introduces model cards to help you document and convey important usage information about your predictions to others. A model card shows statistics associated with the data used to train the model. It can also show any optional explanations you provide about the prediction's intended use, design assumptions, target audience, capabilities and limitations, and other relevant information. Disclosing these details helps users understand predictions and differentiate among multiple predictions. Then they can make ethical, informed decisions about whether a prediction suits their use case.

Impute Missing Values to Improve Model Performance (Pilot)

Too many missing values from unknown or problem data can lower the quality of your model. Einstein Discovery now allows you to impute missing numerical values in your dataset. Enable statistical imputation on a numeric variable, and then Einstein Discovery automatically replaces missing values with values derived from another subset of your data.

Get Better Predictions with Typographic Fuzzy Matching (Pilot)

Einstein Discovery introduces fuzzy matching to smooth over spelling variations, resulting in smarter categorizations and better predictions. Spelling variations in categorical data can split observations into separate categories when they really belong to the same category. Differences in capitalization, plurals, abbreviations, and variations such as behavior and behaviour create ambiguity about how to group the data. If you enable fuzzy matching on a field, Einstein ignores capitalization, and variations such as flavor, Flavor, flavour, and flavors can all belong to the same category. And because Einstein Discovery transforms the data at prediction time, you can skip cleansing the strings during data prep.

Get Automated Model Deployment and Dataset Scoring with Templated Apps

If you haven't tried the latest Einstein Discovery templated apps, you're missing the quickest way to prep, load, and analyze common use cases with just a few clicks. The latest updates offer an end-to-end workflow, enabling you to focus on story customizations instead. Template enhancements replace the manual and complex process of model deployment. Templates also automate the calculation and creation of dataset prediction fields to identify rows that meet an outcome goal.

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Setting up and managing Einstein Discovery is even easier with automatic feature enablement and a consolidated usage dashboard. Now that Einstein Discovery and Einstein Data Insights are part of Tableau CRM, they'll be activated automatically when Tableau CRM is enabled. Automatic enablement saves time with searching for the necessary features to turn on when creating permission sets. With the Einstein Discovery and Einstein Data Insights together on the same screen, you get more accurate utilization limits and metrics of your licenses.

Get Einstein Predictions in Tableau Using Custom Table Calculations

Great news, Tableau users! Starting with Tableau version 21.1, you can get predictions for your Tableau data using Einstein Discovery models that are deployed in Salesforce. For example, suppose you have a Tableau worksheet that contains open orders, and you want to use a model in Salesforce that predicts the probability that an individual order ships on time. To link to that model, you connect to Salesforce, generate a custom script for the model in Model Manager, create a calculated field in Tableau, and then paste the script into the Calculation Editor for that field. Then, when the script runs, it sends a prediction request with the required order data to Salesforce. The Einstein Discovery model calculates a prediction and returns it to Tableau, where it appears in your worksheet at lightning speed. It's really that easy—and that powerful!

Manage Model Versions with Version History

Keep track of updates to your model that result from changes in your business, new and better data, or improved story or model settings. Model Manager now displays a model's version history so that you know exactly when it was updated and by whom, and whether it's scheduled for an upcoming refresh job. For models that aren't performing as expected, you can revert to a previous version that performs better. To investigate the underlying settings associated with a particular model version, you can easily retrieve and examine the story version on which it's based.

Capture Story Version Details While They're Fresh

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Creating a story is better than ever in Einstein Discovery. Notice a quicker response when initiating a new story, even when using larger datasets. You can now focus on story outcomes rather than manual tuning for every dataset to be analyzed. Einstein Discovery automatically tunes your dataset in the background based on feedback from its query optimization engine. For example, it can achieve the optimum set of explanatory variables through filtering and excluding high-cardinality fields.

SEE ALSO:

Salesforce Einstein

Discover More Insights with a Reimagined, Intuitive Interface

Navigating through insights and model metrics has never been easier with the new interface for Einstein Discovery and Einstein Data Insights. The features you know and rely on are all still there, just easier to find and use. As you open story insights, you're welcomed with AI-powered insights right in front of you. The streamlined story interface makes your insights more discoverable than ever, with features such as comparing story versions at a glance, revealing potentially overlooked insights.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: The consolidated story header (1) enables you to find the details that are most relevant to you. Variables are conveniently ordered by correlation (2), visibly indicating the key drivers in the story. Click the shield icon (3) to conveniently view bias in a story. Use the dropdown menus (4) to surface insights by variable or value, which automatically reveals more insights that you can open using the breadcrumb trail (5).
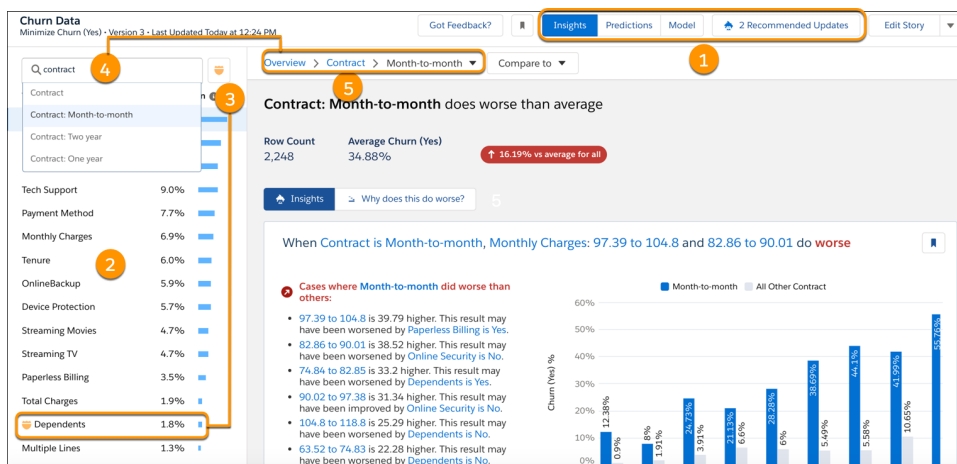
Insights are now easier to locate and context-sensitive (6). Easily navigate to items of interest by clicking one of the interactive links within the Insight cards (7).
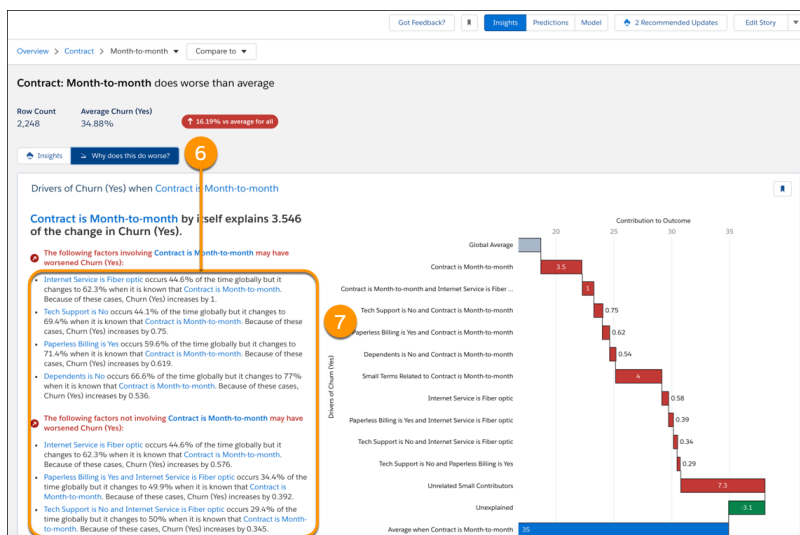
SEE ALSO:

[Einstein Discovery](#)

Embed Predictions in Your Dataset During Data Prep (Generally Available)

Populate your datasets with predictive and prescriptive intelligence using the Discovery Predict transformation for Data Prep recipes. When you run a recipe with a Discovery Predict node, Einstein calculates and saves predicted outcomes on a row-by-row basis. You can even store descriptions of top predictors and improvements. For example, a Data Prep recipe can save predicted win rates, top factors, and ways to improve win rates in a dataset for direct-to-dashboard visualization. With the Discovery Predict node, you can quickly evaluate predictions across a large set of data, assess multiple models before deploying them into production, and aggregate this information in a dashboard.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Data Prep, create or open a recipe that has at least one Input node. Click the **+** Add Node button between two nodes or at the end of the recipe, and select **Discovery Predict**.
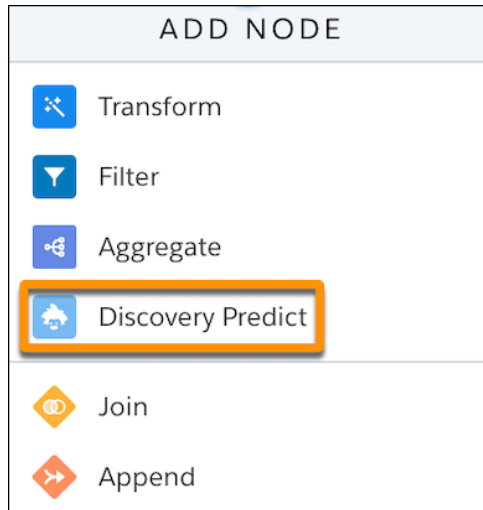
Select an Einstein Discovery prediction deployed in your org, and then map all prediction fields to the recipe.

Optionally, on the **Options** tab of the node, you can store top predictors and improvements in the dataset for quick and easy display on a dashboard.

Prediction Name

Retail Model Tournament Edit

Map Fields   **Options**

Add supplemental information to help explain and contextualize each prediction. Each predictor or improvement will add two columns to your dataset.

☑ Top predictors

Number of predictors

3

☑ Top improvements

Number of improvements

3

Cancel   **Apply**

SEE ALSO:

Einstein Discovery

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 powerful models that Einstein Discovery builds from your stories, you can now upload and deploy TensorFlow or Python models that are created outside of Salesforce. Your data scientists can use their favorite modeling tools to design, build, test, and tune their carefully-crafted models. Then, simply upload and deploy them into your Salesforce org. Your users are up and running quickly, and using the model's predictions to achieve better outcomes.

📝 **Note:** We support external model import 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. External model import is 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 external model import in the applicable IdeaExchange group in the Trailblazer Community.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

Bundle all files associated with your TensorFlow or Python model in a .zip file.

Open Model Manager and click **Upload** to launch the Upload Model wizard.
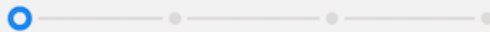
Specify details about the model, then click **Next** to specify all model variables and select the outcome that the model predicts. Select the .zip file containing the model files and click **Done**. You can either deploy this model immediately into your Salesforce environment, or click **Close** to add it to the Uploaded Files tab for later deployment.
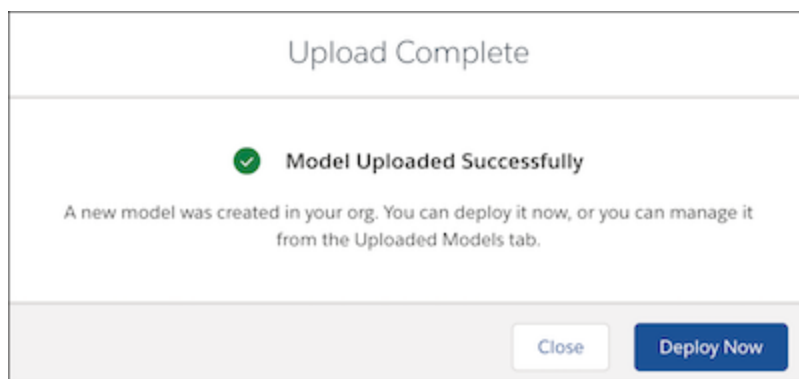
SEE ALSO:

Einstein Discovery

Gain Better Insights Into Your Report Data with Enhanced Einstein Data Insights

With improvements to Einstein Data Insights, it's easier than ever to unleash the power of AI and comprehensive statistical analysis on your report data. Einstein now prevalidates your report before you analyze to ensure that it contains the minimum number of columns and rows needed to conduct a meaningful analysis. The all new, streamlined interface helps focus your exploration by featuring the report columns that are most highly correlated to your goal. Select columns or filters to quickly traverse the Einstein Discovery-powered insights that you want to investigate. And when your report data is refreshed, you can update your analysis on demand.

Where: This change applies to Reports in Lightning Experience. Einstein Data Insights is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Open a tabular or summary report that has at least 2 columns and 50 rows of data, and then click **Analyze** (1) (formerly the **Insights** button).

- If there are no existing analyses on a report, Einstein Data Insights runs a count analysis and looks for statistically significant occurrences of field values.

- If one or more analyses already exist, Einstein prompts you to create a new analysis (2) or launch an existing one (3).
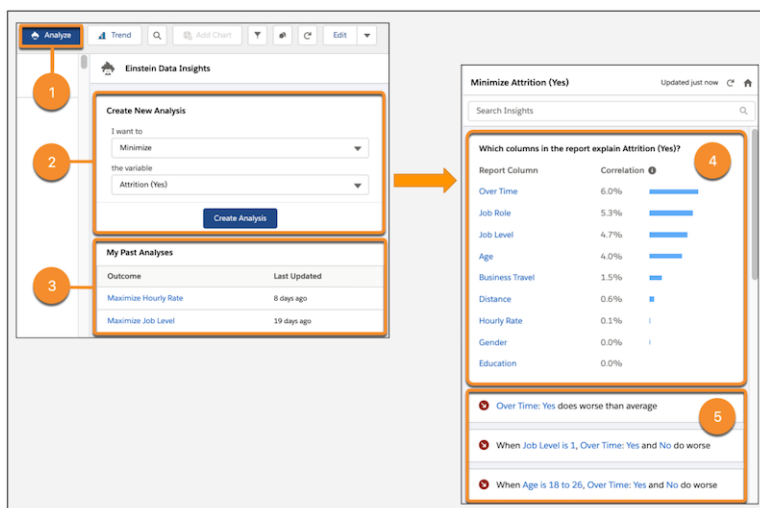
After analyzing your data (except for the count analysis), Einstein shows you the correlation of each report column to the goal (4), in descending order of correlation level, and a list of associated insights (5).

To focus on a particular report column, click it in the correlation summary to see column-based insights sorted by their impact on the goal. To filter the list, in **Search Insights**, select a filter condition (6) to focus on related insights (7).

To quickly update the analysis whenever your report data is refreshed, click the Refresh icon on the Toolbar. To create a new analysis, click the Home icon.
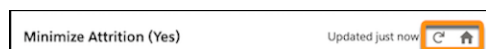
SEE ALSO:

Einstein Discovery

Package, Promote, and Distribute Your Predictions

With packaging support, Einstein Discovery makes your models more portable and shareable than ever before. Now you can build and test your model in a sandbox environment and, when it's production-ready, promote it to your production environment using change sets. You can also build and train models using your own data, then distribute them to others—within or outside your company—using managed or unmanaged packages. That way, customers enjoy the benefits of your models' predictions and improvements without needing the data to train the models themselves. Einstein Discovery supports both first-generation packaging (1GP) and second-generation packaging (2GP).

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: When you're ready to promote a prediction from your sandbox environment to production, use a change set. From Setup, in the Quick Find box, enter `change set`, and select **Outbound Change Sets**. To create an outbound change set, click **New**, enter a name and description, then click **Save**.

To add the prediction to the change set, click **Add**.
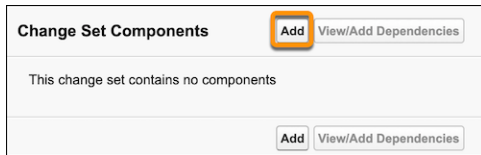
Select the type of component you want to deploy—either **Discovery Prediction** (a prediction that contains one or more models) or **Discovery Model** (an individual model).
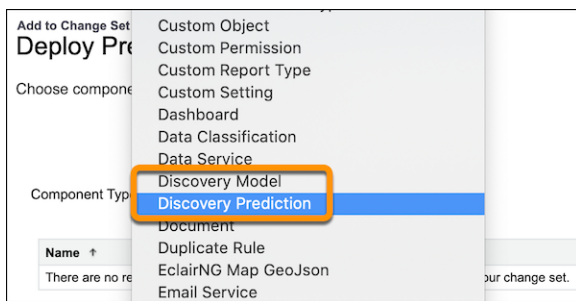
Select one or more deployed predictions or models from the list, and then click **Add to Change Set**.
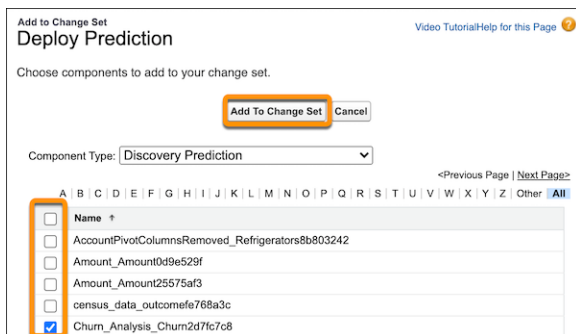
Add any models on which the prediction depends by clicking **View/Add Dependencies**, selecting any available models, and then clicking **Add to Change Set**.

Now the prediction and any associated models appear in the components list.

📝 **Note:** The change set includes the model but not the story used to create the model. A model's originating story version is not uploaded with the change set.

Upload the change list to the target production environment. Then go to that environment, navigate to **Inbound Change Sets**, find the change set you uploaded, and then deploy it just as for any other change set. To learn more, see Change Sets in Salesforce help.

SEE ALSO:

Einstein Discovery

Build Accurate Models Using Random Forest Algorithms (Generally Available)

Einstein Discovery adds a fourth type of model based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models through multiple decision trees, randomization, and other optimization techniques. Create a story with a random forest model, then compare its metrics with other types of models to determine whether this algorithm provides better accuracy for your story.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM 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**.
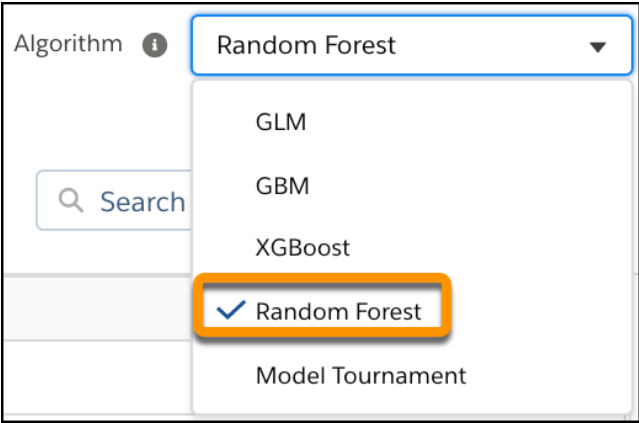
After creating the story, go to Model Metrics and compare the accuracy of this model with models created using other algorithms.

Maintain Model Accuracy With Performance Notifications

For even the best-designed models, performance can decline over time. Models drift when characteristics in the real world data diverge significantly from the training data used to build them. The result? Prediction accuracy drops, which can adversely affect the business decisions that depend on those predictions. Prediction notifications alert you to when it's time to retrain your model with more recent data that reflects current circumstances. Then you can take corrective action to get your drifting models back on course.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Model Manager, view a model that uses automated prediction fields, then click **Notify me if this changes**.
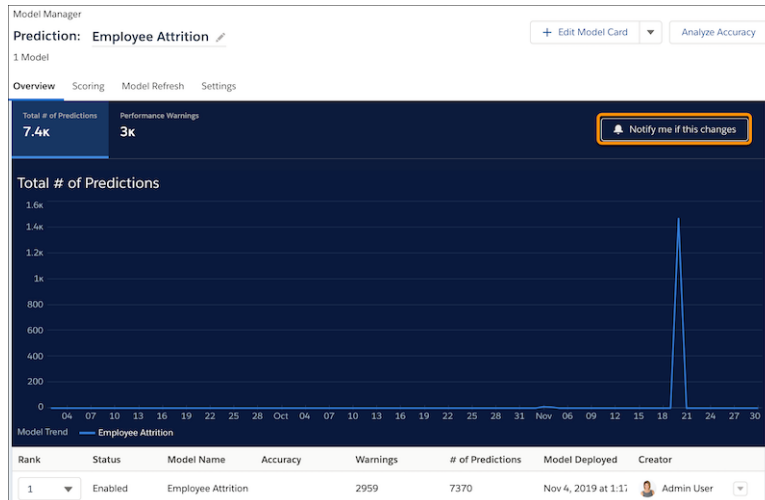
Select the conditions that you want to trigger notifications for. Included are prediction accuracy decreases and too many missing or out-of-bounds values.

Configure thresholds and other alert settings (1), schedule when to evaluate the model (2), add subscribers to the notification (3), and then save.

> ✏️ **Note:** To select **Prediction accuracy decreases**, the terminal state for your model must be configured to enable accuracy monitoring. To learn more, see Configure Model Performance Monitoring

SEE ALSO:

Einstein Discovery

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

In Model Manager, view a prediction, then click **+ Model Card**.

In the template, complete any fields you want to show to users, such as **Primary Intended Use Cases** and other intended use information, and then save your work. If a prediction has multiple models, select a model from the list to show its details.

Enable **Preview model card** to preview your settings. Notice that only completed fields appear—empty fields are omitted. The card also shows model statistics associated with the data used to train the model, including model quality ratings, the distribution of outcome values in the training dataset, and variable correlations with the outcome.

Note: For the pilot, Model Cards are visible only in Model Manager.

SEE ALSO:

[Einstein Discovery](#)

Impute Missing Values to Improve Model Performance (Pilot)

Too many missing values from unknown or problem data can lower the quality of your model. Einstein Discovery now allows you to impute missing numerical values in your dataset. Enable statistical imputation on a numeric variable, and then Einstein Discovery automatically replaces missing values with values derived from another subset of your data.

Note: We support data imputation functionality to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nomina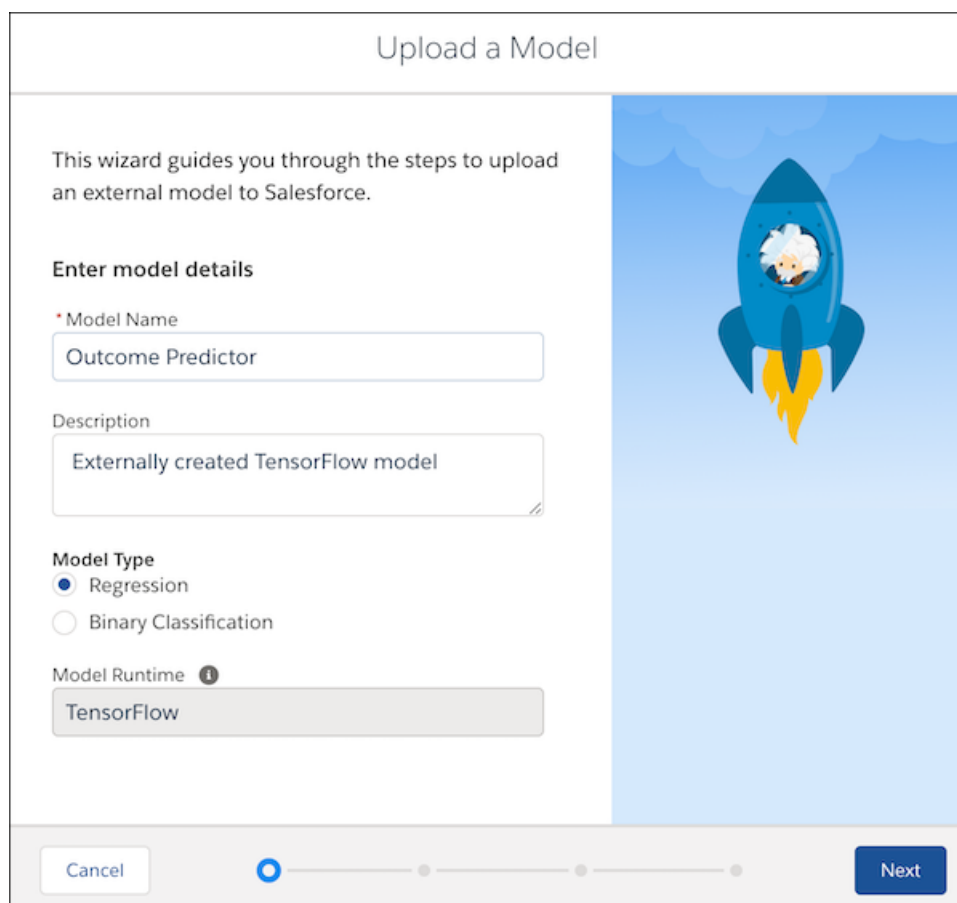ted to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Data imputation functionality is not generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. 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 data imputation in the applicable IdeaExchange group in the [Trailblazer Community](#).

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Without imputation, Einstein Discovery handles observations with empty or NULL values gracefully. If the missing value is an outcome variable, Einstein Discovery omits that observation during analysis, doesn't factor it into averages, and excludes it from insights. If the missing value is an explanatory variable used in a model, Einstein Discovery generates a warning rather than a prediction.

With imputation enabled, observations with missing values are safely counted during analysis. For example, suppose the profit column in a retail store dataset is missing many values. Imputation lets you replace those missing values with values derived from other data, such as the average profit per store by square foot or by city. The result? You get more observations with predictions.

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

In story settings, select the numeric variable that want to impute values for, click the **Settings** subtab, and select **Impute missing values**. Select the variable that you want to derive imputed values from and the average, median, or mode aggregation that you want to use to calculate the values.
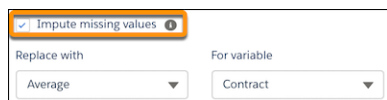
Einstein Discovery

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Until now, Einstein Discovery used only exact matching, meaning that string values with only identical spelling are grouped into the same category. For even slight spelling variations, including capitalization, Einstein handles nonidentical strings such as auto, Auto, and autos, as separate categories. And it generates an out-of-bounds warning if it doesn't find the variation in the training data.

> **Note:** Einstein uses the Levenshtein algorithm for fuzzy matching. For the pilot, the edit distance is set to 1, which means that a single-character edit is allowed for category matching. In the flavors example, the variation flavored belongs in a separate category, because its edit distance is 2.

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

In Model Manager, open a prediction and select **Edit Settings** from the model menu.

Enable fuzzy match for any text field in the **Fuzzy Matching** column, then save your changes.

SEE ALSO:

Einstein Discovery

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Analytics Studio, click **Create** and select **Story**. Select a template and click **Continue**.
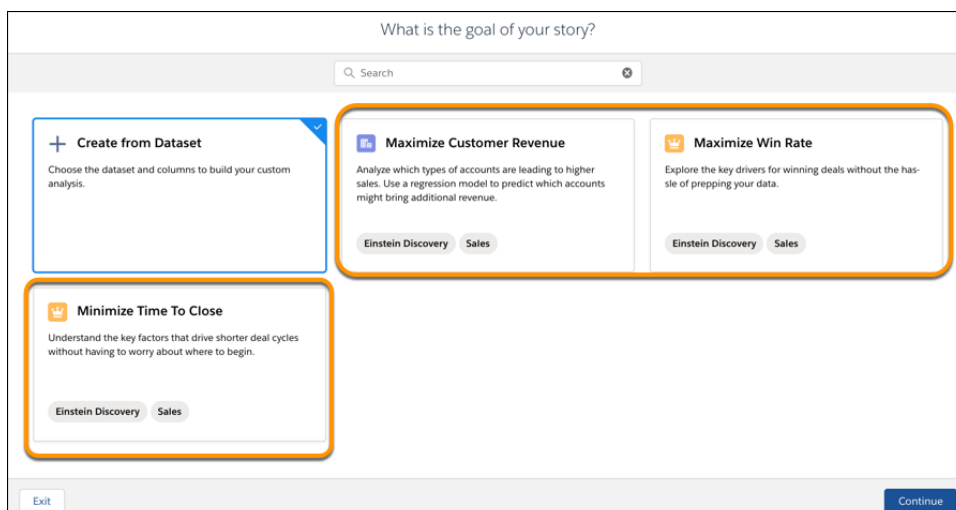
The template overview includes a description (1), a list of supported objects (2), and sample insights (3). Click **Continue** and let Einstein Discovery build your insights.
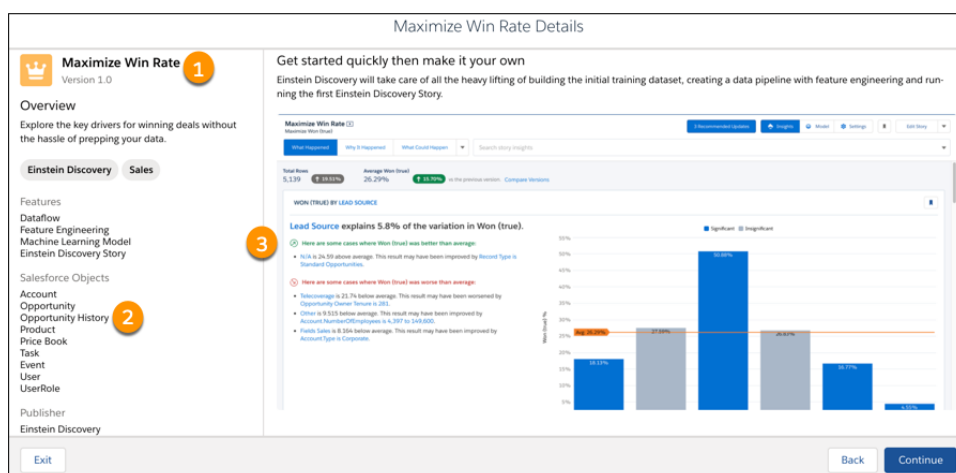
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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Although you no longer manually enable Einstein Discovery and Einstein Data Insights, user permissions must still be assigned through basic or custom permission sets.

Statistics for Einstein Discovery and Einstein Data Insight are available in Setup.

From Setup, in the Quick Find box, enter `Einstein Discovery`, then select **Usage**.
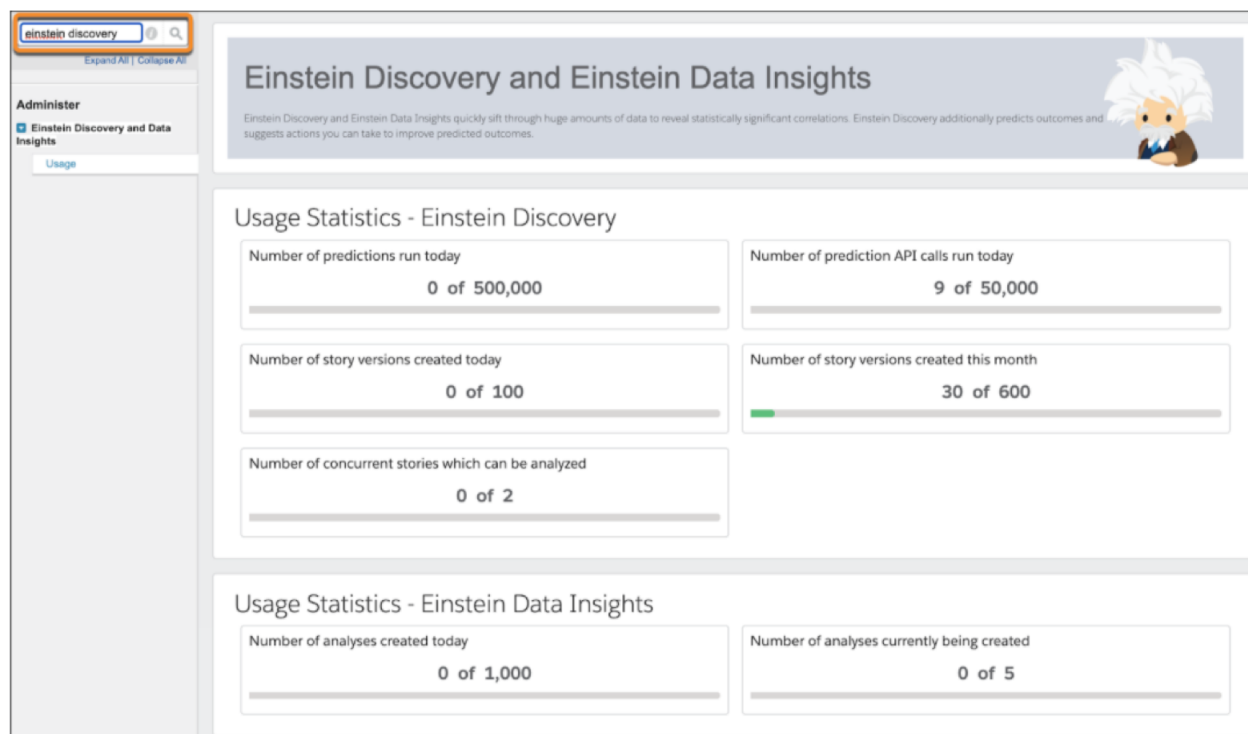
SEE ALSO:

Einstein Discovery

Get Einstein Predictions in Tableau Using Custom Table Calculations

Great news, Tableau users! Starting with Tableau version 21.1, you can get predictions for your Tableau data using Einstein Discovery models that are deployed in Salesforce. For example, suppose you have a Tableau worksheet that contains open orders, and you want to use a model in Salesforce that predicts the probability that an individual order ships on time. To link to that model, you connect to Salesforce, generate a custom script for the model in Model Manager, create a calculated field in Tableau, and then paste the script into the Calculation Editor for that field. Then, when the script runs, it sends a prediction request with the required order data to Salesforce. The Einstein Discovery model calculates a prediction and returns it to Tableau, where it appears in your worksheet at lightning speed. It's really that easy—and that powerful!

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Tableau Desktop, choose **Help** > **Settings and Performance** > **Manage Analytics Extension Connection** and make a new Analytics Extension Connection to Einstein Discovery.

In Model Manager, select a prediction and select **Create Tableau Table Calculation** from the menu.

Model Manager generates a script containing the ID of the model or prediction you want to use, the columns (variables) used in the model, and the corresponding source columns in Tableau (which you can edit). Click **Copy to Clipboard**.

In your Tableau worksheet, create a calculated field, and then paste the script generated from Model Manager into the Calculation Editor.

If needed, replace the column names inside each ATTR or SUM function with the name of the matching column in your Tableau data, then click **OK**.

To learn more, see Get Predictions in Tableau Calculated Fields in Salesforce help.

SEE ALSO:

Einstein Discovery

Manage Model Versions with Version History

Keep track of updates to your model that result from changes in your business, new and better data, or improved story or model settings. Model Manager now displays a model's version history so that you know exactly when it was updated and by whom, and whether it's scheduled for an upcoming refresh job. For models that aren't performing as expected, you can revert to a previous version that performs better. To investigate the underlying settings associated with a particular model version, you can easily retrieve and examine the story version on which it's based.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Model Manager, view a prediction, then view a model. In the side panel, click the **History** tab.

In the **Update History** list, click the menu next to the model version that you want to manage. You can reset the model to a different version, and you can view the story version associated with this model version.

SEE ALSO:

[Einstein Discovery](#)

Capture Story Version Details While They're Fresh

Add story details while they're top of mind with automatic version descriptions. The previous release introduced useful version descriptions that required navigation to the version location to add your text. Now, the version description field appears automatically as new story versions are saved.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To add a version description, click **Edit Story**. Make changes to the existing story, then click **Update Story**. Add your version notes in the Version Description (Optional) window, then click **Update** to save.
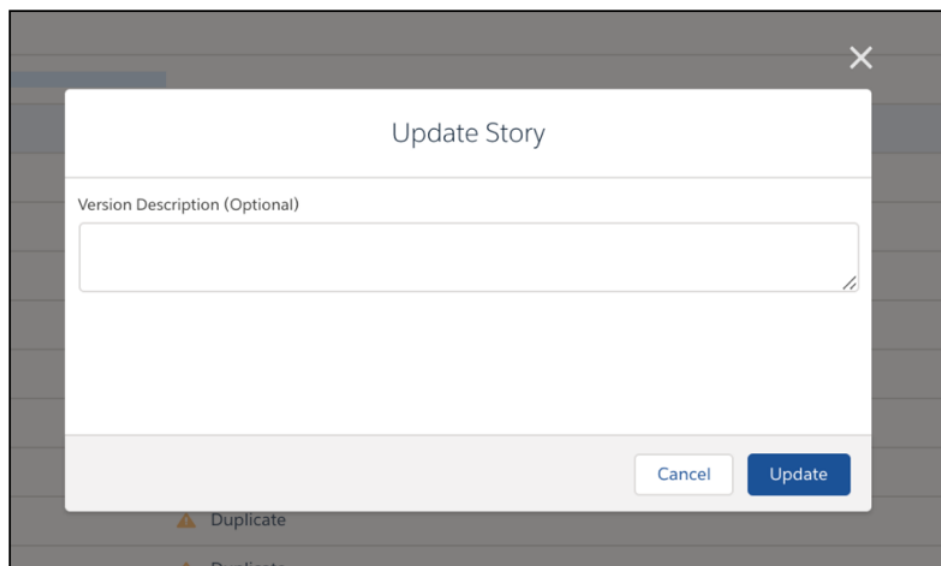
SEE ALSO:

[Einstein Discovery](#)

Get Enhanced Performance in Your Einstein Discovery Stories

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Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

[Einstein Discovery](#)

Tableau CRM for Everyone

With more ways to customize Tableau CRM (formerly Einstein Analytics), you and your users can more easily set up and access relevant analytics experiences. Control how Analytics tab users access the Analytics Studio, manage asset visibility within apps (beta), provide notifications and subscriptions within embedded dashboards, and order subscription updates your way.

IN THIS SECTION:

[Control Which Analytics Tab Users Access the Analytics Studio](#)

Specify who can create apps and edit and delete datasets and dashboards by making Analytics Studio invisible to Analytics Tab users on a per profile basis. When you remove Analytics Studio visibility from a profile, Analytics tab users with the profile don't see Analytics Studio in the App Launcher. They also don't have the Open in Analytics Studio action in asset menus and dashboard headers.

[Control Who Sees What in an App with Asset Visibility (Beta)](#)

App managers and editors can now hide select assets with the Asset Visibility feature. Asset Visibility enables you to manage the presence of sensitive assets, such as a dashboard in development or a raw dataset, from other app members.

Enable Notifications and Subscriptions in Embedded Dashboards

Two new attributes for the Einstein Analytics Dashboard component allow you to give your embedded dashboard users options to personalize their analytics experience. The Enable Notifications attribute lets users tailor how they're notified about dashboard widget updates. And the Enable Subscriptions attribute lets users opt to receive periodic email updates on dashboard widgets. In addition, if you set the dashboard's header to show, it includes icons that open notification and subscription management panels within the embedded dashboard.

Arrange Subscription Emails Your Way

See your most important updates first by customizing your subscription email. New controls in the Subscription Preview let you arrange the order of subscriptions within your email.

Note the Change in the Learning Center

Due to a backend change, we had to remove the Trailhead banner from the Tableau CRM Learning Center. The banner showed Trailhead badges earned, including the in-app badges for completing the learning journeys in the Start Your Analytics Adventure section of the Learning Center. Although the banner is gone, the Start Your Analytics Adventure section remains and you can still earn those in-app badges. To view them and all your badges, just navigate to Trailhead.

Get More from Tables in Tableau CRM for iOS

Tables are tops when it comes to visualizing data. But sometimes you can lose context and get stuck in endless screen scrolling on smaller mobile devices. Now improved scrolling and grouping make it easier to access tabular data on the go.

Get the Latest Version of Tableau CRM for iOS

To benefit from the latest enhancements and bug fixes, upgrade to version 12.1 of Tableau CRM for iOS.

Get the Latest Version of Tableau CRM for Android
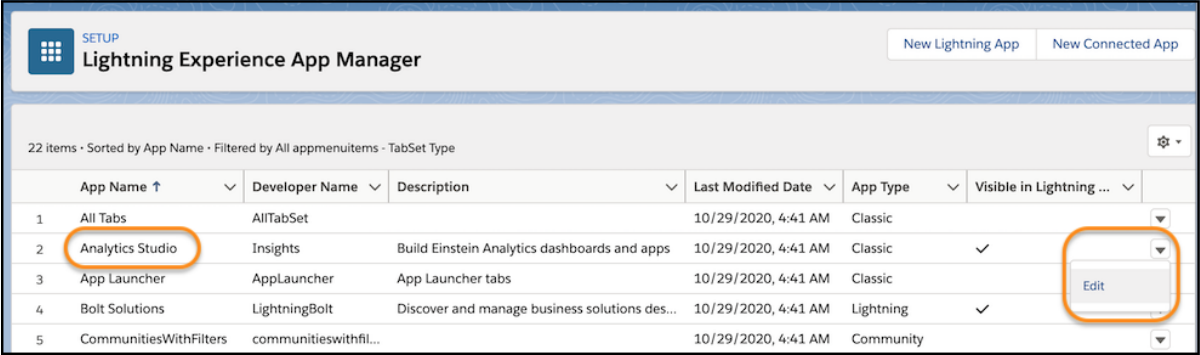
To benefit from the latest enhancements and bug fixes, upgrade to version 12.1 of Tableau CRM for Android.

Control Which Analytics Tab Users Access the Analytics Studio

Specify who can create apps and edit and delete datasets and dashboards by making Analytics Studio invisible to Analytics Tab users on a per profile basis. When you remove Analytics Studio visibility from a profile, Analytics tab users with the profile don't see Analytics Studio in the App Launcher. They also don't have the Open in Analytics Studio action in asset menus and dashboard headers.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM 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 `App Manager`. In the App Manager, open the Analytics Studio menu and select **Edit**.

To restrict access to the Analytics Studio for a profile, clear its check from the **Visible** column in the Assign to Profiles section.
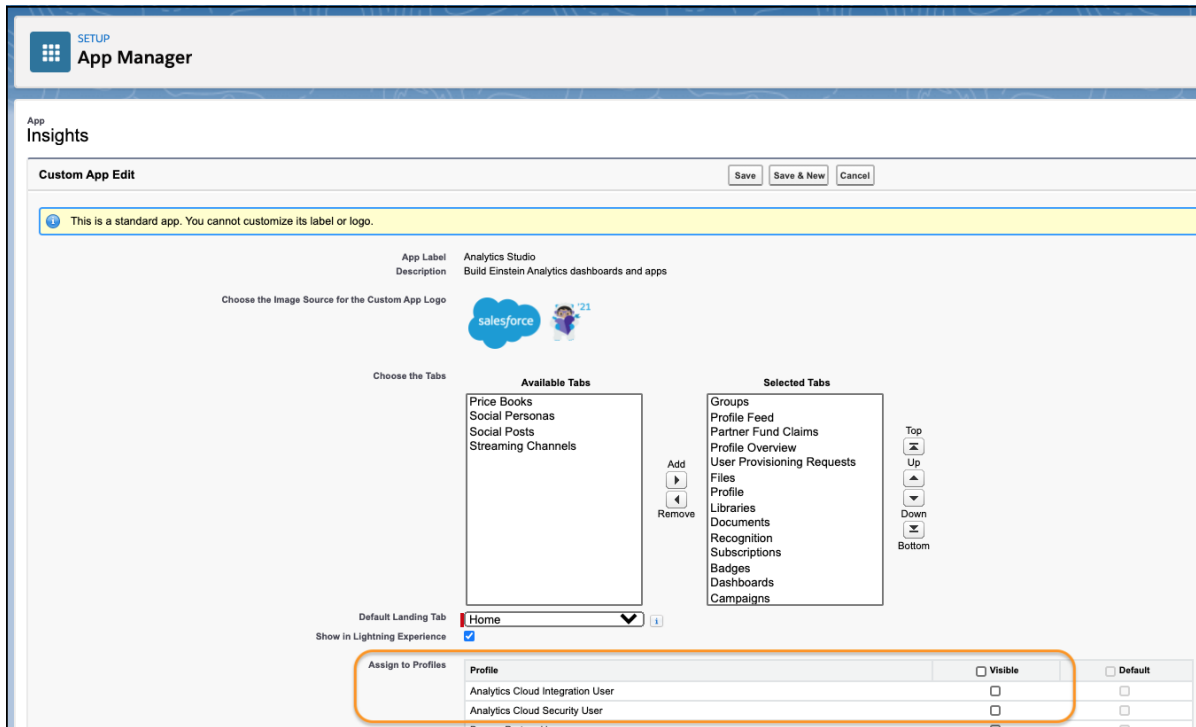
⛔ Important: Although disabling visibility removes UI links to Analytics Studio within the Analytics tab, any URL to the Studio version of an asset always opens it in Studio. The Studio version URL is available in the Share dialog and is provided in notification and subscription emails. However, for new notifications created on embedded dashboards and in Analytics Tab, links in notification emails navigate the user to the Analytics Tab.

📝 Note: This change applies to the Analytics tab only. Access to Analytics Studio from embedded dashboards isn't changing and is still controlled through the component's attributes.

Control Who Sees What in an App with Asset Visibility (Beta)

App managers and editors can now hide select assets with the Asset Visibility feature. Asset Visibility enables you to manage the presence of sensitive assets, such as a dashboard in development or a raw dataset, from other app members.

📝 Note: As a beta feature, Asset Visibility is a preview and isn't part of Tableau CRM 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 about it. All restrictions, Salesforce reservation of rights, obligations concerning Tableau CRM, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Asset Visibility in the Trailblazer Community.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Contact your Salesforce account representative to enable Asset Visibility in your org.

How: App managers can toggle an asset's status to control visibility by clicking the row level action drop-down menu for the asset then clicking **Hide**.
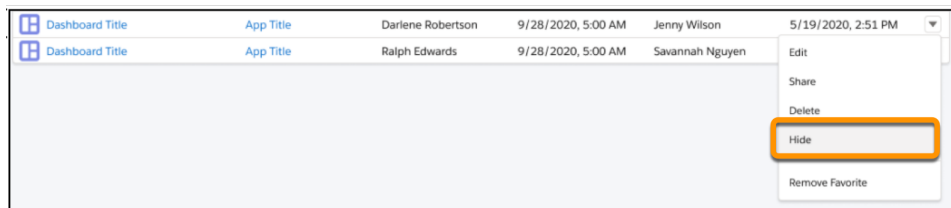
Asset changes affect app members that are assigned with Viewer sharing access. Assets remain visible to app users with Manager or Editor sharing access regardless of the asset's status. Users with Manager or Editor sharing access can control asset visibility.

Enable Notifications and Subscriptions in Embedded Dashboards

Two new attributes for the Einstein Analytics Dashboard component allow you to give your embedded dashboard users options to personalize their analytics experience. The Enable Notifications attribute lets users tailor how they're notified about dashboard widget updates. And the Enable Subscriptions attribute lets users opt to receive periodic email updates on dashboard widgets. In addition, if you set the dashboard's header to show, it includes icons that open notification and subscription management panels within the embedded dashboard.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To email notifications to other recipients, users need the Notification Emails: Add Recipients user permission. To access subscriptions, users need the Use Subscription Emails user permission. To allow users to subscribe to tables and receive downloaded table data in .csv attachments with their subscription emails, they also need the Download Analytics Data user permission.

How: Select **Enable Notifications** and **Enable Subscriptions** in the Einstein Analytics Dashboard component configuration panel in the Lightning App Builder.
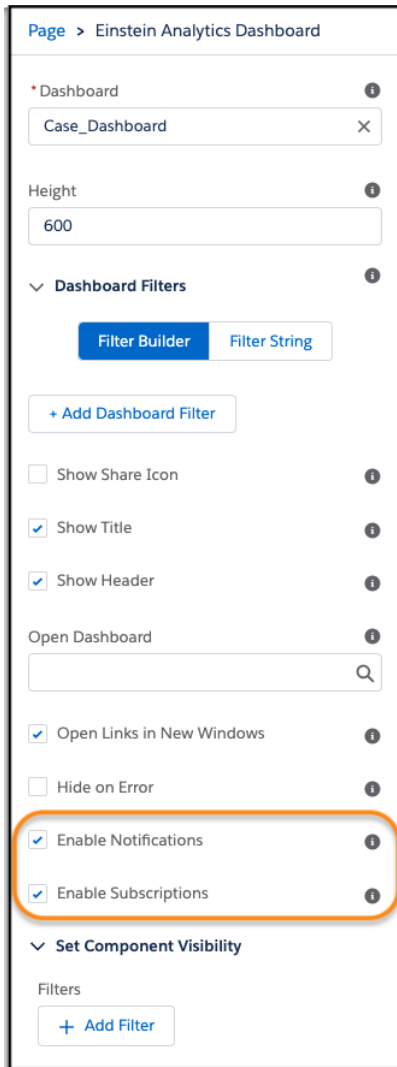
In a Visualforce dashboard component, configure these attributes with `enableNotifications="true"` and `enableSubscriptions="true"`.

When these attributes are enabled, the **Set Notification** and **Subscribe** options appear on the widget menus of the embedded dashboard. With these actions, users can set up and save notifications and subscriptions.
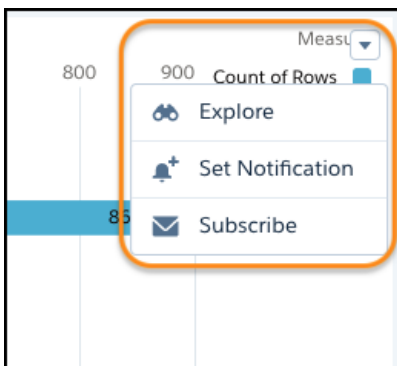
If you also enable the **Show Header** attribute so that the dashboard header appears, icons for opening the management panels are included. In the management panels, users can edit and delete their own notifications and subscriptions.

If Show Header is disabled, users can edit and delete notifications and subscriptions in the Analytics Tab or the Analytics Studio.

💡 Tip: If you enable Show Header, it's recommended that the dashboard is at least 400 pixels in width to accommodate the management panels.

SEE ALSO:

IdeaExchange: Notifications and Subscriptions in Embedded Dashboards

Arrange Subscription Emails Your Way

See your most important updates first by customizing your subscription email. New controls in the Subscription Preview let you arrange the order of subscriptions within your email.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM 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. To allow users to subscribe to tables and receive downloaded table data in .csv attachments with their subscription emails, they also need the Download Analytics Data user permission.

How: Click **Subscriptions** on the Tableau CRM home page. In the Subscription Preview, newly subscribed widgets and lenses are added last by default. To reorder subscriptions, use the arrow buttons and menu actions.
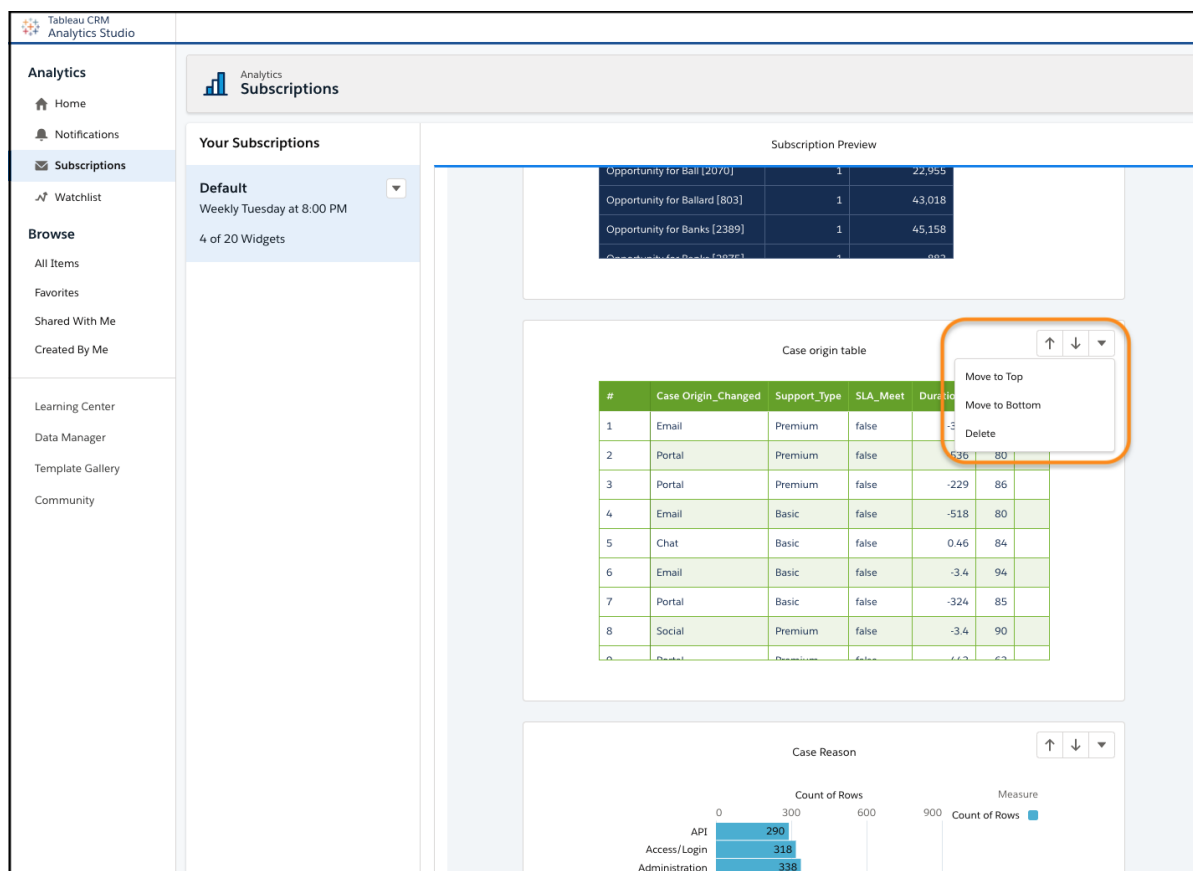
You see the new order in the Subscription Panel immediately and in your subscription email when it next arrives in your inbox.

Note the Change in the Learning Center

Due to a backend change, we had to remove the Trailhead banner from the Tableau CRM Learning Center. The banner showed Trailhead badges earned, including the in-app badges for completing the learning journeys in the Start Your Analytics Adventure section of the Learning Center. Although the banner is gone, the Start Your Analytics Adventure section remains and you can still earn those in-app badges. To view them and all your badges, just navigate to Trailhead.

Where: This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Get More from Tables in Tableau CRM for iOS

Tables are tops when it comes to visualizing data. But sometimes you can lose context and get stuck in endless screen scrolling on smaller mobile devices. Now improved scrolling and grouping make it easier to access tabular data on the go.

Where: This change applies to Tableau CRM for iOS. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: You always know what you're viewing with groupings that stay in place while you scroll data.

Efficient groupings in compare tables make it easy to see what's most relevant.

- Single data groupings (1) show as rows.
- Multiple data groupings (2) show as full width sections.
- Totals (3) and subtotals (4) for multiple data groupings show within grouping sections.

Get the Latest Version of Tableau CRM for iOS

To benefit from the latest enhancements and bug fixes, upgrade to version 12.1 of Tableau CRM for iOS.

Where: These changes apply to Tableau CRM for iOS. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Check out what's new in Tableau CRM for iOS.

- Use improved compare tables for iPad to easily read and analyze tabular data.
- Access reusable dashboard components.
- Bug fixes.

For the latest enhancements, download Tableau CRM from the App Store.

Get the Latest Version of Tableau CRM for Android

To benefit from the latest enhancements and bug fixes, upgrade to version 12.1 of Tableau CRM for Android.

Where: These changes apply to Tableau CRM for Android. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Check out what's new in Tableau CRM for Android.

- Access reusable dashboard components.
- Bug fixes.

For the latest enhancements, download Tableau CRM from Google Play.

SEE ALSO:

Salesforce Help: Create and Manage Dashboards with Reusable Components

Salesforce Help: Which Analytics Mobile Experience Do I Use?

Salesforce Data Pipelines

Modify and enrich your Salesforce data at scale.

IN THIS SECTION:

Enrich Salesforce Data at Scale with Salesforce Data Pipelines

Use this new product, Salesforce Data Pipelines, alongside Salesforce to modify and enrich your Salesforce data. If your CRM data is scattered among multiple services inside and outside of Salesforce, consolidate it in Salesforce. Create a single, accessible, trusted view of all CRM data to enable users in your org to make smarter, faster decisions. You can also use Data Pipelines to transform Salesforce data in bulk without needing third-party tools or taking the data outside your trusted Salesforce environment. Unlike external Extract, Transform, and Load (ELT) tools and data warehousing solutions, Data Pipelines is built natively into your Salesforce CRM, ensuring that updates are fast and secure. No more round-tripping data through expensive, fragile, lower-performing external systems.

Enrich Salesforce Data at Scale with Salesforce Data Pipelines

Use this new product, Salesforce Data Pipelines, alongside Salesforce to modify and enrich your Salesforce data. If your CRM data is scattered among multiple services inside and outside of Salesforce, consolidate it in Salesforce. Create a single, accessible, trusted view of all CRM data to enable users in your org to make smarter, faster decisions. You can also use Data Pipelines to transform Salesforce data in bulk without needing third-party tools or taking the data outside your trusted Salesforce environment. Unlike external Extract, Transform, and Load (ELT) tools and data warehousing solutions, Data Pipelines is built natively into your Salesforce CRM, ensuring that updates are fast and secure. No more round-tripping data through expensive, fragile, lower-performing external systems.

Where: Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Data Pipelines isn't available to Government Cloud customers.

Why: Data Pipelines enables you to enrich your Salesforce data with other critical information that users need to make more informed decisions. For example, to enable customer support agents to provide premium service to large accounts and proactively reach out to unsatisfied customers, you build this recipe.
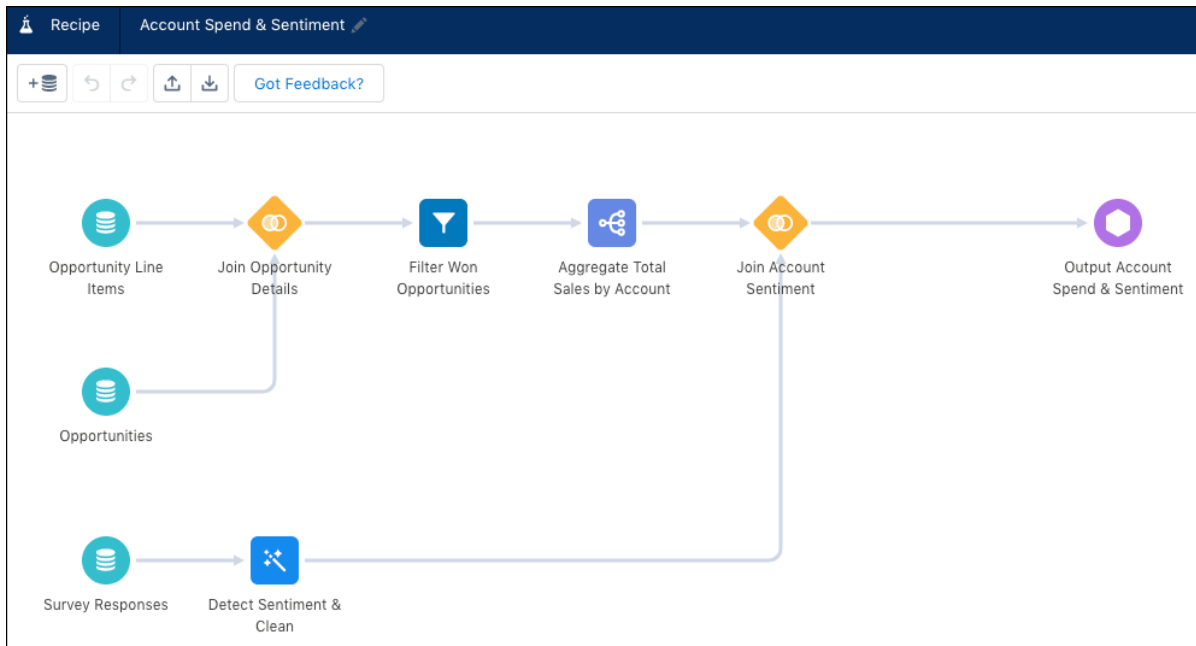
A recipe is a sequence of transformations that Tableau CRM performs on source data before loading it into a target. This recipe calculates the lifetime spend of each customer by aggregating opportunity amounts for each account. It pulls this data from the Salesforce objects: Opportunity and Opportunity Line Item. The recipe also pulls in customer comments from a Google survey. To determine how customers feel about your products and services, the recipe uses a machine learning transformation to automatically detect the general sentiment of each customer's comment. The recipe then joins the sentiment with each account. Finally, the recipe writes the lifetime spend and sentiment to a custom Salesforce object.

To make this information available to support agents, you add the information to a Lightning component in the account detail page. Now agents can handle each account appropriately.

How: To set up Data Pipelines, from Setup, in the Quick Find box, enter `Data Pipelines`, and then click **Getting Started**.
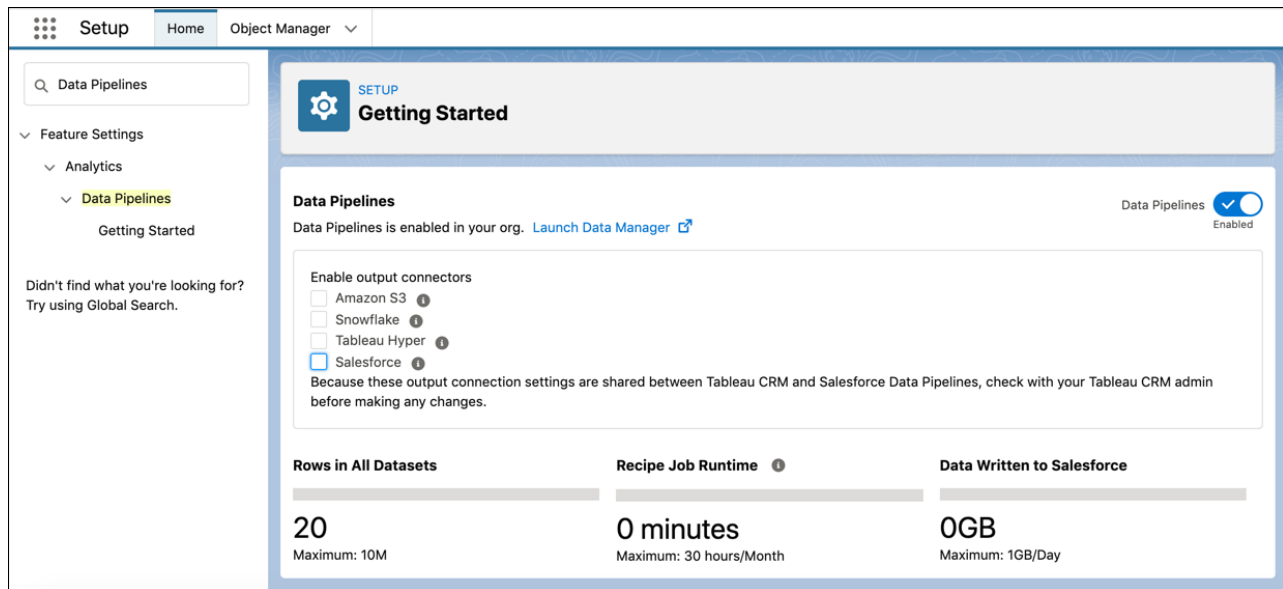
Verify that Data Pipelines is enabled, and then enable the output connectors to write data to a target, like Salesforce. (You can also write data to Amazon S3, Snowflake, and Tableau Online.) If you purchased Data Pipelines and Tableau CRM, the output connector settings impact both products.

After setup is complete, users can use the Data Manager app to build, run, schedule, and monitor recipes that extract, transform, and load data into Salesforce. To open the Data Manager app, select Data Manager from the app picker.
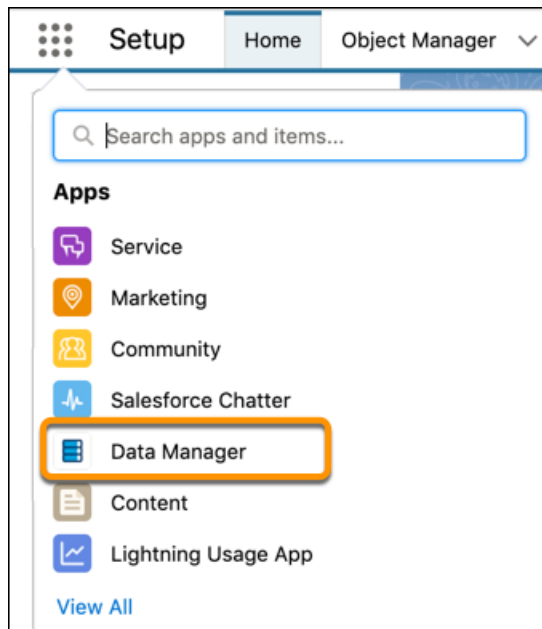
SEE ALSO:

> *Salesforce Help*: Salesforce Data Pipelines
>
> *Salesforce Help*: Set Up Salesforce Data Pipelines
>
> *Salesforce Help*: Modify and Enrich Salesforce Data with Recipes

Salesforce Einstein

Einstein Recommendation Builder is Generally Available and checks your data as you build. Einstein Article Recommendations has a scorecard to help you make the most out of your data and improve your recommendations. Navigate insights more easily with Einstein Discovery's story interface.

Get to know all the ways you can work smarter with Salesforce Einstein!

Salesforce Overall

Einstein Search

Natural language search lets users search with everyday words to get filtered lists of records. By narrowing down search results, users can find what they're looking for more easily. You can now enable natural language search in Government Cloud. And the same natural language search capability on the desktop is now available on the Salesforce mobile app.

Service

Einstein for Service

Build confidence in Einstein Bots with an error handler system dialog and the ability to show data from Salesforce records. Use the Einstein Article Recommendations scorecard to identify where you can improve data in your predictive model. Allow Einstein to recommend chat replies based on fewer closed chat transcripts. Expand your global reach with multiple language support for Bot inputs and other Einstein for Service features.

Sales

Sales Cloud Einstein

Einstein Opportunity Scoring uses global models when there isn't enough opportunity data. Einstein Lead Scoring stores fields more intuitively.

Analytics

Einstein Discovery

Navigate insights seamlessly with Einstein Discovery's new story interface, get predictions in datasets using Data Prep recipes, and predict outcomes using externally-built models that you upload and deploy into Salesforce.

Customization

Einstein Builders

Einstein Recommendation Builder is generally available and checks your data as you go. Build predictions for managed packages with Einstein Prediction Builder.

Development

Einstein Vision and Language

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Vision and Language APIs to easily AI-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

Our new Omnichannel Inventory service unlocks the power of-real-time inventory availability for B2C Commerce and Salesforce Order Management. B2B Commerce provides enhancements to make it easier for you to work with Commerce data and manage your products, and to configure checkouts and integrations. Salesforce Order Management introduces new flow core actions and expanded support for B2C Commerce custom data.

IN THIS SECTION:

Omnichannel Inventory

Omnichannel Inventory provides a scalable inventory solution that delivers real-time inventory availability at the location level across all your fulfillment channels.

B2B Commerce for Lightning

Seamlessly offer more than one option for your products with variations and attributes. Drive sales by allowing unauthenticated users to get access to your store. Allow buyers to create and manage lists of products that they're interested in. Get a head start in setting up a new store with sample data. Create adaptable checkouts with synchronous integrations and manage them with the integration tabs.

Checkout and Integrations

Build a synchronous checkout experience that dynamically adjusts to customer needs. Manage your integrations and find integration resources with new integration tabs. Update your Delivery Method component with the latest validation triggers.

Salesforce Order Management

Enhancements to Salesforce Order Management include new flow core actions and expanded integration of B2C Commerce custom data.

Omnichannel Inventory

Omnichannel Inventory provides a scalable inventory solution that delivers real-time inventory availability at the location level across all your fulfillment channels.

Where: This feature is new in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with an Omnichannel Inventory license.

Why: Omnichannel Inventory combines the power of headless APIs and the flexibility of the Salesforce Platform to ensure that you and your customers always have access to current inventory availability information.

The Omnichannel Inventory solution consists of the following resources:

- Omnichannel Inventory Service - A multi-tenant system consisting of headless APIs that let you get inventory availability and manage reservations across all your fulfillment channels.
- Connect REST APIs - Salesforce APIs that let B2C Commerce and Salesforce Order Management call the Omnichannel inventory APIs.
- Omnichannel Inventory Application - A Console application that lets you view inventory availability across locations and manage your locations and location groups.
- Flow Core Actions - Actions that provide Omnichannel Inventory functionality in flows.

With Omnichannel Inventory, you get:

- Granular location visibility - Use new APIs to manage location-level inventory availability.
- Powerful grouping - Segment inventory for specific storefronts using location groups.
- Flexibility - Easily add and remove locations from your active inventory storefront count.
- Centralized inventory visibility - View inventory availability across all fulfillment channels.
- Accuracy at scale - Rely on real-time reliability to prevent costly underselling and overselling during flash sales or holidays.
- Omnichannel experiences - Unlock buy online, pick up in store; ship from store; and more.

How: Your admin must enable Omnichannel Inventory for your org.

IN THIS SECTION:

Get Inventory Availability and Manage Reservations with Headless APIs

Omnichannel Inventory uses headless APIs to deliver real-time inventory availability, streamlined reservation processing, and location-based order fulfillment.

View Inventory Availability and Manage Locations with the Omnichannel Inventory Console

The Omnichannel Inventory Console lets you look up inventory availability and manage locations, location groups, and location group assignments.

Enhance the Shopping and Order Experience with B2C Commerce and Salesforce Order Management Integrations

It's easy to integrate Omnichannel Inventory with B2C Commerce and Order Management. An integrated inventory solution lets you use your network of retail stores and distribution centers to optimize fulfillment from every location.

Use Omnichannel Inventory Features in Flows

Omnichannel Inventory provides flow core actions for use in flows.

SEE ALSO:

Salesforce Help: Omnichannel Inventory (can be outdated or unavailable during release preview)

Get Inventory Availability and Manage Reservations with Headless APIs

Omnichannel Inventory uses headless APIs to deliver real-time inventory availability, streamlined reservation processing, and location-based order fulfillment.

Where: This feature is new in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with an Omnichannel Inventory license.

Why: Omnichannel Inventory headless APIs enable integrations with external systems to perform the following actions.

- Import Inventory
- Upload Inventory
- Get Import Status

- Get Availability
- Transfer Reservation
- Release Reservation
- Fulfill Reservation

Using Omnichannel Inventory APIs, you can:

- Retrieve inventory updates from your back-office systems (WMS, ERP, POS).
- Provide real-time inventory availability to shoppers on your ecommerce storefronts.
- Reserve inventory when shoppers add items to their online shopping carts and submit their orders.
- Share inventory availability by location and location group for order fulfillment.

SEE ALSO:

 Salesforce Help: Omnichannel Inventory APIs (can be outdated or unavailable during release preview)

View Inventory Availability and Manage Locations with the Omnichannel Inventory Console

The Omnichannel Inventory Console lets you look up inventory availability and manage locations, location groups, and location group assignments.

Where: This feature is new in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with an Omnichannel Inventory license.

Why: The Omnichannel Inventory Console is the first thing you see when you open Omnichannel Inventory.
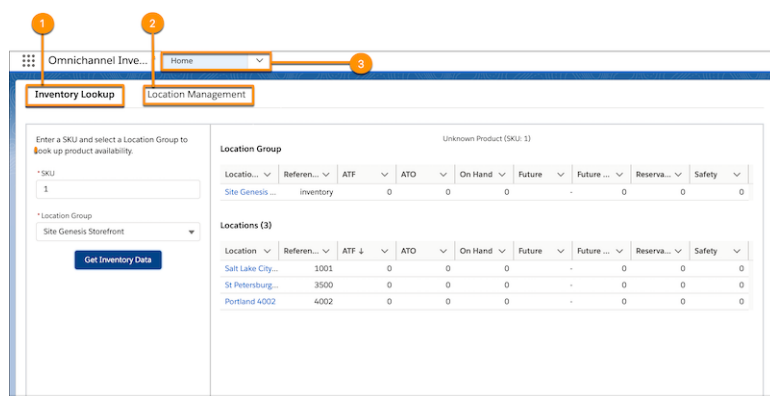
- The Inventory Lookup tab lets you search for inventory availability by SKU and location group. (1)
- The Location Management tab lets you synchronize changes that you make in the Omnichannel Inventory Console with the data maintained in Omnichannel Inventory. (2)
- The Navigation bar dropdown lets you open list views for Locations and Location Groups. Open records from the list view pages to see detailed information about your locations and location groups. Add, edit, and delete locations and location groups. (3)

SEE ALSO:

 Salesforce Help: Omnichannel Inventory Console (can be outdated or unavailable during release preview)

Enhance the Shopping and Order Experience with B2C Commerce and Salesforce Order Management Integrations

It's easy to integrate Omnichannel Inventory with B2C Commerce and Order Management. An integrated inventory solution lets you use your network of retail stores and distribution centers to optimize fulfillment from every location.

Where: This feature is new in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with an Omnichannel Inventory license.

Why: Integrate Omnichannel Inventory with both B2C Commerce and Order Management to provide seamless, end-to-end shopping experiences for your customers.

By ensuring that you and your customers always have access to current inventory availability information across all channels and locations, Omnichannel Inventory acts as your inventory hub — bridging the gap between the shopping and fulfillment experiences.

B2C Commerce

The B2C Commerce native integration with Omnichannel Inventory makes it easy for you to:

- Get real-time inventory availability across all of your digital channels.
- Segment inventory for specific storefronts using location groups.
- Enable inventory sharing from multiple locations, stores, and distribution centers, ship-from-store, and buy online, pick up in store.

Salesforce Order Management

The Order Management Integration uses an API proxy that lets you:

- Get availability for SKUs, locations, and location groups.
- Transfer reservations from a group to a location or from one location to another location.
- Release reservations during cancellations.
- Fulfill reservations when fulfillment orders are closed.

The Order Management integration unlocks tools to support distributed order management.

- Fulfillment processes let you use real-time inventory availability to optimize fulfillment from every location.
- Pre-built routing logic lets you:
  - Prioritize fulfilling from a location that can fulfill an order with the fewest number of split shipments.
  - Prioritize fulfilling from a location that is closest to the customer's deliver address.

- Manual order routing lets you create fulfillment orders manually for orders that aren't automatically routed.
- Rerouting data model lets you implement rerouting logic, track routing attempts on the Order Summary, and schedule future routing attempt.

SEE ALSO:

    Salesforce Help: Omnichannel Inventory Integrations (can be outdated or unavailable during release preview)

Use Omnichannel Inventory Features in Flows

Omnichannel Inventory provides flow core actions for use in flows.

Where: This feature is new in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with an Omnichannel Inventory license.

How: In Flow Builder, drag the **Action** element in your flow. Select the **Omnichannel Inventory Service** category, then select an action from the **Action** list.

Omnichannel Inventory provides these actions:

Omnichannel Inventory Service Create Reservation

Create one or more inventory reservations at a location or location group.

Omnichannel Inventory Service Fulfill Reservation

Fulfill one or more inventory reservations at a location.

Omnichannel Inventory Service Get Availability

Get inventory availability data for one or more products at one or more inventory locations or location groups.

Omnichannel Inventory Service Release Reservation

Release one or more inventory reservations at a location.

Omnichannel Inventory Service Transfer Reservation

Transfer one or more inventory reservations between locations or location groups.

B2B Commerce for Lightning

Seamlessly offer more than one option for your products with variations and attributes. Drive sales by allowing unauthenticated users to get access to your store. Allow buyers to create and manage lists of products that they're interested in. Get a head start in setting up a new store with sample data. Create adaptable checkouts with synchronous integrations and manage them with the integration tabs.

IN THIS SECTION:

Commerce App

Get mapping and examples of Commerce data for a new store by adding sample data to it. Drive brand exposure by allowing guests to browse your stores. Use reference components to guide the development of your custom components. Set up your Product and Pricing workspaces, knowing that your settings remain in place even after you navigate away from the page. Allow buyers to save products that they're interested in to lists. Integrate store data with Google Analytics to build more meaningful reports.

B2B Commerce Template

Use reference components to create custom components, allow buyers to create and manage lists of products, and track variation details and attribute sets.

Product Variations and Attributes

Create variations of a product to give customers more options when checking out. Assign variation attribute sets to offer standardized options across products. See which of your products are variations from the Product workspace. Get step-by-step guidance for creating and configuring variations and attribute sets.

Commerce App

Get mapping and examples of Commerce data for a new store by adding sample data to it. Drive brand exposure by allowing guests to browse your stores. Use reference components to guide the development of your custom components. Set up your Product and Pricing workspaces, knowing that your settings remain in place even after you navigate away from the page. Allow buyers to save products that they're interested in to lists. Integrate store data with Google Analytics to build more meaningful reports.

IN THIS SECTION:

Add Sample Data to Your Store

Add sample data to your store and automatically get products, categories, a catalog, media files, buyer groups, buyer accounts, price books, price book entries, and entitlements. All the data is mapped to create a fully functioning store. Customize the data to fit your store, and you're ready to go.

Use Store Interaction Data to Build Insightful Reports

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

Increase Visibility with Guest Browsing

Get great exposure for your store catalogs and products by allowing unauthenticated—or guest—users access to them. Use buyer groups to assign the product and catalog entitlements that you want guest users to have.

Pick Up New Products in Sitemap Incremental Updates

Make it easy for guest users to find new products in web searches. After you perform an incremental update to your sitemap, third-party search index crawlers can find newly added, publicly available products. New products are picked up in manual and scheduled incremental updates to your sitemap.

Retain Workspace List Settings

The Product and Pricing workspace hybrid lists now have persistent settings. You can log out of your Commerce app knowing that your layout and filter settings stay in place.

Create Product2 Sharing Rules to Share B2B Commerce Data with Guests

To improve security, we changed product2 org-wide default for guest users to PRIVATE. If you currently share Product2 data with guest users, you must create sharing rules to continue to do so.

Add Sample Data to Your Store

Add sample data to your store and automatically get products, categories, a catalog, media files, buyer groups, buyer accounts, price books, price book entries, and entitlements. All the data is mapped to create a fully functioning store. Customize the data to fit your store, and you're ready to go.

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

Who: This feature applies to users with a B2B Commerce License.

How: Select **Add Sample Data** when setting up your store.

Use Store Interaction Data to Build Insightful Reports

To gain insight into the products that buyers interact with, create custom reports with Google Analytics using the search and category data that Salesforce provides.

Where: This feature is available in Experience Builder sites, in Enterprise, Performance, Unlimited, and Developer editions.

How: Use the data to analyze your buyers' interactions with the products in your store. Discover things like:

- What buyers are searching for most
- What buyers are searching for but not finding
- The product types that buyers are looking for
- The specific products that buyers are looking for

For information about Google Analytics, see Google Analytics Documentation.

Increase Visibility with Guest Browsing

Get great exposure for your store catalogs and products by allowing unauthenticated—or guest—users access to them. Use buyer groups to assign the product and catalog entitlements that you want guest users to have.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to customers with a B2B Commerce License.

How: In your store's Administration section, click **Buyer Access**. Scroll to the Guest Browsing section, and click **Create Profile**. An actionable checklist appears with all the steps to get guest browsing up and running.
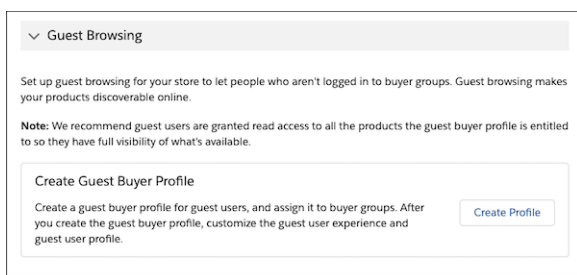
> **Note:** There are significant changes to guest browsing this release. Any guest browsing setups created during the pilot program no longer work.

Pick Up New Products in Sitemap Incremental Updates

Make it easy for guest users to find new products in web searches. After you perform an incremental update to your sitemap, third-party search index crawlers can find newly added, publicly available products. New products are picked up in manual and scheduled incremental updates to your sitemap.

Where: This feature is available in Lightning Experience, in Enterprise, Performance, Unlimited, and Developer editions.

How: To manually update your store sitemap, make your store available to the public in **Experience Builder** > **Settings** > **General**, and select **Public can access site**. Then open the SEO tab, and click **Generate Sitemap**.

> **Note:** Incremental sitemap updates are supported in all languages and locales that your store supports.

Retain Workspace List Settings

The Product and Pricing workspace hybrid lists now have persistent settings. You can log out of your Commerce app knowing that your layout and filter settings stay in place.

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

Who: This feature is available for users with a B2B Commerce license.

Create Product2 Sharing Rules to Share B2B Commerce Data with Guests

To improve security, we changed product2 org-wide default for guest users to PRIVATE. If you currently share Product2 data with guest users, you must create sharing rules to continue to do so.

Where: This feature is available in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

Who: This feature is available to customers with a B2B Commerce License.

SEE ALSO:

    Salesforce Help: Create Sharing Rules (can be outdated or unavailable during release preview)

B2B Commerce Template

Use reference components to create custom components, allow buyers to create and manage lists of products, and track variation details and attribute sets.

IN THIS SECTION:

Use Reference Components to Guide Your Custom Component Development

With reference Lightning Web Components (LWCs) in the b2b-commerce-on-lightning-quickstart GitHub repository, you can review and reuse the underlying code. The repository is a Salesforce Developer Experience (SFDX) project that you can use as a starting point for building your own custom components. Use example component structures and behaviors to guide your own development of B2B components and apply existing platform features and APIs.

Lists Are Generally Available

In your B2B Commerce for Lightning store, the lists feature is now generally available. Your buyers can create, manage, and sort up to 10 lists to track up to 500 products of interest on each list. Through the My Lists component's property editor, you can add up to three fields to list items so buyers can see more detail on each item.

Hide the Add to List Button

With the general availability of lists in B2B Commerce for Lightning, some components have new settings that control list features. The Cart and Product Detail Card components now have controls for hiding list-related buttons. When you don't want to offer list features in your store, you can easily remove them.

View Variation Parent Product Details on the Product Page

Use the new Variation Parent Product Lightning Page component to view product information for variation parent products on the Product page.

View Variation Attributes on the Product Page

Use the Variation Attributes Lightning Page component to view attribute information for variation parent products on the Product page.

Use Reference Components to Guide Your Custom Component Development

With reference Lightning Web Components (LWCs) in the b2b-commerce-on-lightning-quickstart GitHub repository, you can review and reuse the underlying code. The repository is a Salesforce Developer Experience (SFDX) project that you can use as a starting point for building your own custom components. Use example component structures and behaviors to guide your own development of B2B components and apply existing platform features and APIs.

Where: This feature is available in Lightning Experience, in Enterprise, Performance, Unlimited, and Developer editions.

How: The repository includes a Readme file to get you started. For full instructions on retrieving these components from GitHub and adding them to your store, go to b2b-commerce-on-lightning-quickstart/examples/lwc/.

Lists Are Generally Available

In your B2B Commerce for Lightning store, the lists feature is now generally available. Your buyers can create, manage, and sort up to 10 lists to track up to 500 products of interest on each list. Through the My Lists component's property editor, you can add up to three fields to list items so buyers can see more detail on each item.

Where: This feature is available in Experience Builder sites, in Enterprise, Performance, Unlimited, and Developer editions.

Hide the Add to List Button

With the general availability of lists in B2B Commerce for Lightning, some components have new settings that control list features. The Cart and Product Detail Card components now have controls for hiding list-related buttons. When you don't want to offer list features in your store, you can easily remove them.

Where: The change is available in Experience Builder sites, in Enterprise, Performance, Unlimited, and Developer editions.

How: To hide list buttons, edit component properties for the Product Detail Card and Cart components. To remove My Lists from store navigation, remove the link to the My Lists page from your store's navigation component.

SEE ALSO:

Salesforce Help: Remove Lists from Your Store (can be outdated or unavailable during release preview)

View Variation Parent Product Details on the Product Page

Use the new Variation Parent Product Lightning Page component to view product information for variation parent products on the Product page.

Where: This change applies to Experience Builder sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

View Variation Attributes on the Product Page

Use the Variation Attributes Lightning Page component to view attribute information for variation parent products on the Product page.

Where: This change applies to Experience Builder sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Product Variations and Attributes

Create variations of a product to give customers more options when checking out. Assign variation attribute sets to offer standardized options across products. See which of your products are variations from the Product workspace. Get step-by-step guidance for creating and configuring variations and attribute sets.

IN THIS SECTION:

Give Buyers More Product Options with Variations and Attributes

Extend the range of products that you can offer your customers with variations and attributes. For example, attach size and color options to a sweater or show the fabric choices for a couch.

View Parent Classes from the Product Workspace

Get an overview of product classes and variations. The Product workspace has a new Product Class column that you can use to track your simple, variation parent, and variation products. You can view, filter, and take action on all variations associated with a variation parent by clicking the Variations tab from the product record.

The guided setup for Variations gives you step-by-step instructions to set up attribute sets and to associate them with a variation product. Configuration steps guide you to make the attribute sets searchable and to create attribute sets in multiple languages.

Give Buyers More Product Options with Variations and Attributes

Extend the range of products that you can offer your customers with variations and attributes. For example, attach size and color options to a sweater or show the fabric choices for a couch.

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

Who: This feature applies to users with a B2B Commerce License.

Why: Variations are created from a variation parent product to ensure that product data is mapped correctly. But each variation has a unique SKU to track purchases. Attribute sets are a group of options with picklist values that can be associated with a product, such as size (S, M, L) and color (red, blue, yellow). Variation attribute sets can be assigned to multiple products in a Salesforce org, regardless of the store they're associated with.

How: Your Salesforce admin can create variation parent products and variations from the Commerce app.

View Parent Classes from the Product Workspace

Get an overview of product classes and variations. The Product workspace has a new Product Class column that you can use to track your simple, variation parent, and variation products. You can view, filter, and take action on all variations associated with a variation parent by clicking the Variations tab from the product record.

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

Who: This feature applies to users with a B2B Commerce License.

Get Guidance to Set Up and Configure Variations and Attributes

The guided setup for Variations gives you step-by-step instructions to set up attribute sets and to associate them with a variation product. Configuration steps guide you to make the attribute sets searchable and to create attribute sets in multiple languages.

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

Who: This feature applies to users with a B2B Commerce License.

How: Admins can access the guided setup from **Commerce Setup** > **Variation Products**.

Checkout and Integrations

Build a synchronous checkout experience that dynamically adjusts to customer needs. Manage your integrations and find integration resources with new integration tabs. Update your Delivery Method component with the latest validation triggers.

IN THIS SECTION:

Create Adaptable Checkouts with Synchronous Integrations
Your B2B Commerce for Lightning Experience checkout likely has use cases for asynchronous and synchronous checkout experiences. Now you can have the best of both worlds with an adaptive checkout that can switch between the two processing methods.

Manage Integrations with Integration Tabs
We renovated the B2B Commerce for Lightning Experience Integration Dashboard. Now each integration has its own unique tab so we can offer specific resources and help. Previously, you found all your integrations on a single tab labeled Store Integrations.

The Delivery Method component in B2B Commerce for Lightning Experience is getting an upgrade. When a buyer makes a purchase, we changed the way delivery methods are updated in your buyer user profiles. If you previously cloned the Delivery Method checkout subflow, replace it with the latest version. If you don't update your delivery method to the latest version, your buyers see an error or a blank screen when they try to complete their checkout.

Create Adaptable Checkouts with Synchronous Integrations

Your B2B Commerce for Lightning Experience checkout likely has use cases for asynchronous and synchronous checkout experiences. Now you can have the best of both worlds with an adaptive checkout that can switch between the two processing methods.

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

Who: You need a B2B Commerce license to access checkout features.

Why: When your customers place small orders and there isn't much processing to be done, synchronous execution is faster and preferable. Use synchronous executions when the cart is smaller and there are fewer integrations to execute. This change saves your customer time and lets the checkout execute as efficiently as possible. To make the Cart to Order and Activate Order subflows run asynchronously, change the **Run Asynchronously** parameter from within your checkout flow.

Manage Integrations with Integration Tabs

We renovated the B2B Commerce for Lightning Experience Integration Dashboard. Now each integration has its own unique tab so we can offer specific resources and help. Previously, you found all your integrations on a single tab labeled Store Integrations.

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

Who: You need a B2B Commerce license to access integrations.

Why: Visit your store administration page to access your existing integration implementations.

How: To access the integration tabs, navigate to your store landing page. Select **Administration**, and choose your integration type.

Update Your Delivery Method Component

The Delivery Method component in B2B Commerce for Lightning Experience is getting an upgrade. When a buyer makes a purchase, we changed the way delivery methods are updated in your buyer user profiles. If you previously cloned the Delivery Method checkout subflow, replace it with the latest version. If you don't update your delivery method to the latest version, your buyers see an error or a blank screen when they try to complete their checkout.

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

Who: You need a B2B Commerce license to access integrations.

Why: After a buyer makes changes and the system validates those changes with a decision node, the checkout delivery method is updated. If you didn't clone the Delivery Method subflow or you use the Delivery Method screen component, you're good to go. No changes needed. If you cloned the Delivery Method subflow or you used SFDX to create your Salesforce org, your subflow needs an update.

How: To update your subflow, find your checkout flow in Flow Builder, and open the Delivery Method subflow. Note the values that you pass into the subflow, and create a new Delivery Method subflow using the same values. Delete the original subflow. Save and activate the flow.

Salesforce Order Management

Enhancements to Salesforce Order Management include new flow core actions and expanded integration of B2C Commerce custom data.

IN THIS SECTION:

Use New Order Management Routing Features in Flows

Salesforce Order Management provides new flow core actions for use in flows.

Integrate Custom Shipment Data from B2C Commerce

(Feature Available March 17, 2021) The B2C Commerce integration now copies custom attributes from the B2C Commerce Shipment object to matching custom fields on the Order Delivery Group and Order Delivery Group Summary objects in Salesforce.

Integrate Custom Shipping Item Data from B2C Commerce

(Feature Available April 7, 2021) The B2C Commerce integration now copies custom attributes from the B2C Commerce Shipping Line Item object to matching custom fields on the Order Product and Order Product Summary objects in Salesforce.

Use New Order Management Routing Features in Flows

Salesforce Order Management provides new flow core actions for use in flows.

Where: This feature is in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to users with a Salesforce Order Management license.

How: In Flow Builder, drag the **Action** element in your flow. Select the **Order Management** category, then select an action from the **Action** list.

Order Management adds these new actions:

Create Fulfillment Orders
Create fulfillment orders and fulfillment order products for multiple order delivery group summaries, each of which defines a recipient and delivery method.

Find Routes With Fewest Splits
Evaluate ordered product quantities against available inventory to determine the smallest combination of locations that can fulfill the order.

Order Routing Rank By Average Distance
Calculate the average distance from sets of inventory locations to an order recipient, and return the sets sorted by that average distance.

Integrate Custom Shipment Data from B2C Commerce

(Feature Available March 17, 2021) The B2C Commerce integration now copies custom attributes from the B2C Commerce Shipment object to matching custom fields on the Order Delivery Group and Order Delivery Group Summary objects in Salesforce.

Where: This feature is in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available in orgs that integrate Salesforce Order Management with Salesforce B2C Commerce.

Integrate Custom Shipping Item Data from B2C Commerce

(Feature Available April 7, 2021) The B2C Commerce integration now copies custom attributes from the B2C Commerce Shipping Line Item object to matching custom fields on the Order Product and Order Product Summary objects in Salesforce.

Where: This feature is in Lightning Experience and is available in Enterprise, Unlimited, and Developer editions.

Who: This feature is available in orgs that integrate Salesforce Order Management with Salesforce B2C Commerce.

Experience Cloud

Spring '21 brings a fresh start for Community Cloud with a brand new name—Experience Cloud. As part of that refresh, we updated the tools you use to build your sites and made several terminology and documentation changes. The Build Your Own (LWR) template is now generally available and includes support for Salesforce CMS content. And we added enhancements to several Lightning components.

IN THIS SECTION:

Hello Experience Cloud, Farewell Community Cloud

To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.

Lightning Components in Experience Builder

Control the drop shadow on your tile images in the Tile Menu component, and make the most of the improved Related List - Single Lightning component.

Developer Productivity

Develop sites more efficiently with the Build Your Own (LWR) template, which is generally available, and add CMS content to custom Lightning web components. Communicate between Aura and Lightning web components in Experience Builder site pages with Lightning message service.

Guest User Security Policies Enforced

Salesforce is enforcing a variety of guest user security policies, including reducing object permissions for guest users.

Security and Sharing

Find out about enhanced security for users with standard external profiles, as well as a new cookie setting for Experience Builder sites.

Other Changes

Learn about smaller changes that improve your experience with Experience Cloud.

Hello Experience Cloud, Farewell Community Cloud

To better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile apps—Community Cloud is now called Experience Cloud.

Where: This change affects all Salesforce orgs using Community Cloud.

Why: As part of this rename, you can expect changes to the tools you use to build your sites and terminology and documentation updates. Let's take a closer look.

First up, terminology. Whether you're creating a forum, portal, or any other type of digital experience, at the most basic level, you're building an online site. So instead of saying *community*, which primarily connotes a forum where people interact with one another, we now use the term *site* in much of the user interface and documentation.

Here's a quick summary of the key terminology changes.

We used to say...	Now we say...	Meaning...
Community	Site or Experience Cloud site	The site you build in Experience Cloud using either Experience Builder or Visualforce.
Lightning community	Experience Builder site	The site you build using Experience Builder.
Salesforce Tabs + Visualforce community	Salesforce Tabs + Visualforce site	The site you build using Visualforce.
Lightning community template	Experience Builder template	The template you use to build a site in Experience Builder, such as the Customer Service and the Build Your Own templates.
Lightning community theme	Experience Builder theme	The theme you use to style your site in Experience Builder.
Lightning community page	Experience Builder page	The pages that make up your site in Experience Builder.

Next, let's look at the main user interface changes. To access your sites from Setup, in the Quick Find box, enter `Digital Experiences`, and select **All Sites**.
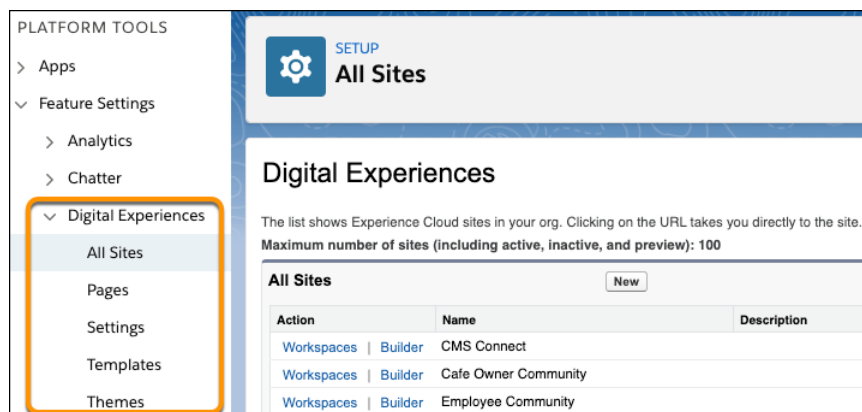
Tip: If you accidentally enter `Community` in the Quick Find box, we automatically display the renamed Digital Experiences menu instead—we know that old habits are hard to break!

The other items in the Digital Experiences menu are also simplified, but all settings and items contained in this area remain the same. And, as appropriate, we replaced *community* with *site* or *Experience Cloud site* in Experience Workspaces, Experience Builder, and other areas of your org.

Finally, you can see the same updates and terminology changes in our documentation, including help topics, developer guides, Trailhead content, and more.

Lightning Components in Experience Builder

Control the drop shadow on your tile images in the Tile Menu component, and make the most of the improved Related List - Single Lightning component.

IN THIS SECTION:

[Add or Remove Drop Shadows in the Tile Menu Component](#)
Use the new Show drop shadow setting to choose whether to show a drop shadow on your tile images in the Tile Menu component. Previously, the drop shadow was always on by default.

[Give Access to Related List - Single on Mobile Sites with the Revamped Component](#)
The Related List - Single component shows a list of related records based on one specific object. The newly revamped component is now mobile responsive. The new version of the Related List - Single component is available in Experience Builder with the Winter '21 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

Add or Remove Drop Shadows in the Tile Menu Component

Use the new Show drop shadow setting to choose whether to show a drop shadow on your tile images in the Tile Menu component. Previously, the drop shadow was always on by default.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Give Access to Related List - Single on Mobile Sites with the Revamped Component

The Related List - Single component shows a list of related records based on one specific object. The newly revamped component is now mobile responsive. The new version of the Related List - Single component is available in Experience Builder with the Winter '21 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Developer Productivity

Develop sites more efficiently with the Build Your Own (LWR) template, which is generally available, and add CMS content to custom Lightning web components. Communicate between Aura and Lightning web components in Experience Builder site pages with Lightning message service.

IN THIS SECTION:

[Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)](#)
The Build Your Own (LWR) template, which was previously available as a pilot program, is now generally available. Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by the new Lightning Web Runtime (LWR), this customizable template delivers unparalleled page performance and improves developer productivity.

[Add Salesforce CMS Content to Custom Lightning Web Components](#)
Readily add Salesforce CMS content to Experience Builder sites using custom Lightning web components. After you publish content in a CMS workspace, you can enhance any custom component with your content repositories at the click of a button.

[Lightning Message Service Now Supported in Experience Cloud (Beta)](#)
Use Lightning message service to communicate across the Document Object Model (DOM) within an Experience Builder site page. Communicate between Aura and Lightning web components in Experience Builder site pages.

lightning:navigation in Aura Sites Now Supports generateUrl with More actionNames

The `lightning:navigation` component now supports generateURL using a pageReference with the New, Edit, and Clone actionNames. Previously, only the View actionName was supported. Standard record pages with edit and clone actions and standard object pages with a new action now return a URL that can be used to navigate to the action specified by the pageReference. The behavior of the navigate call using `lightning:navigation` hasn't changed.

Navigate to CMS Content Pages Using a PageReference

In Lightning components, you can use the navigation service's new `standard__managedContentPage` pageReference type to navigate to CMS content pages in an Experience Builder site.

Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)

The Build Your Own (LWR) template, which was previously available as a pilot program, is now generally available. Develop blazing fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by the new Lightning Web Runtime (LWR), this customizable template delivers unparalleled page performance and improves developer productivity.

Where: This change applies to Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

Why: Experience Cloud has an existing Build Your Own template, which supports Aura and Lightning web components. But our newest template is based exclusively on the Lightning Web Components programming model. In addition to providing exceptional performance, the template:

- Provides custom URL paths for unauthenticated sites, meaning no more `/s` cluttering up your site's URL—for example, `https://mycustomdomain.com/mypage`.

- Supports the development of reusable Lightning web components and themes that follow modern web standards.

- Includes Apex and User Interface API support, so you can access Salesforce records, SOSL, and more, to provide data-rich experiences for your customers.

💡 Tip: Build Your Own (LWR) is a minimal template that provides few components and only the most essential pages. The template is best suited for developers who are comfortable developing Lightning web components and working with Salesforce DX, User Interface API, and Apex.
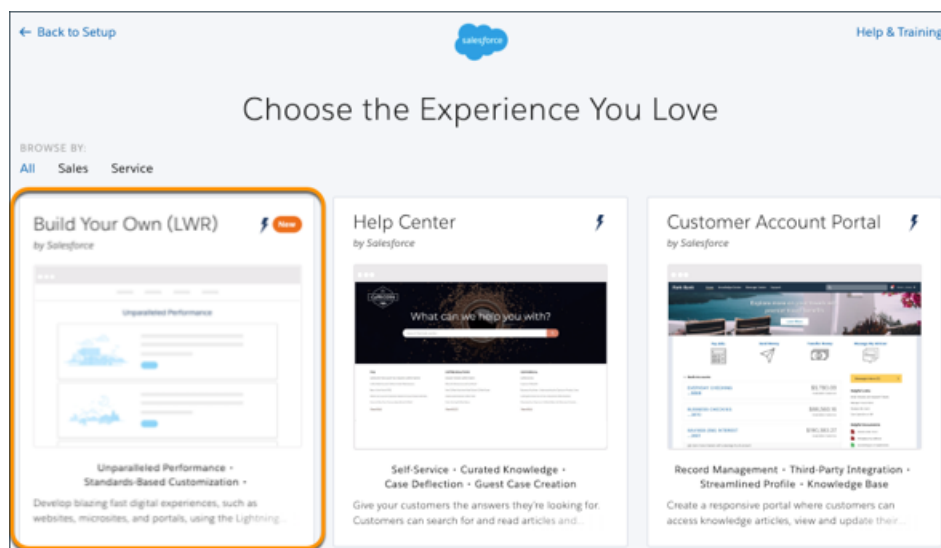
Also, with the enhancements made since the previous pilot release, now you can:

- Create CMS content pages to display individual pieces of CMS content.
- Add Salesforce CMS images to your pages via the Rich Content Editor component.
- Use Salesforce CMS content in custom Lightning web components.
- Create a consistent visual feel across base and custom Lightning web components using a new branding system (developer preview).
- Include page-level SEO settings, such as Page Title and Description.
- Use Google Analytics.

IN THIS SECTION:

ExperienceBundle Enabled by Default for Build Your Own (LWR) Sites

For sites created with the Build Your Own (LWR) template, the ExperienceBundle Metadata API type is now automatically enabled. Previously, to enable the type for all Experience Builder sites, you selected the **Enable ExperienceBundle Metadata API** checkbox in Setup.

Maintain Continuity with the Customizable Service Not Available Page (Pilot)

If you use the Build Your Own (LWR) template, you can keep in touch with your customers and even create cases if your site is down. Use Experience Builder to configure the page to fit your brand. Add custom branding and messaging, including Email-to-Case directly from the Service Not Available page.

Use a Single Certificate Domain for Your Content Delivery Network (Pilot)

Protect your brand by switching from a shared certificate to a single branded certificate. The content delivery network (CDN) manages the certificate for you, so you can set it and forget it.

SEE ALSO:

Developer Guide: *LWR Sites for Experience Cloud*

ExperienceBundle Enabled by Default for Build Your Own (LWR) Sites

For sites created with the Build Your Own (LWR) template, the ExperienceBundle Metadata API type is now automatically enabled. Previously, to enable the type for all Experience Builder sites, you selected the **Enable ExperienceBundle Metadata API** checkbox in Setup.

Where: This change applies to sites using the Build Your Own (LWR) template, accessed through Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

Why: For Aura sites, you must still enable the checkbox to use ExperienceBundle instead of SiteDotCom. However, to avoid potential issues when deploying or retrieving both Aura and LWR sites, we recommend against changing the setting repeatedly. For example, when using Salesforce CLI source commands, if you pull source from a scratch org, ensure that the setting remains the same when pushing from your project.

Maintain Continuity with the Customizable Service Not Available Page (Pilot)

If you use the Build Your Own (LWR) template, you can keep in touch with your customers and even create cases if your site is down. Use Experience Builder to configure the page to fit your brand. Add custom branding and messaging, including Email-to-Case directly from the Service Not Available page.

Where: This change applies to sites using the Build Your Own (LWR) template, accessed through Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

> **Note:** We support Site Not Available page 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. The customizable Site Not Available page is 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 in the Experience Cloud group in the Trailblazer Community.

Who: This feature is available for sites using the Build Your Own (LWR) template when the standard content delivery network (CDN) system, Akamai, is enabled.

How: The Site Not Available page includes an HTML Editor component that you can customize as needed. Alternatively, you can add a Rich Content Editor component to the page to add your own text and images. Custom Lightning web components aren't supported. You can also create objects, beyond Cases, using Email to ISV packages found on AppExchange.
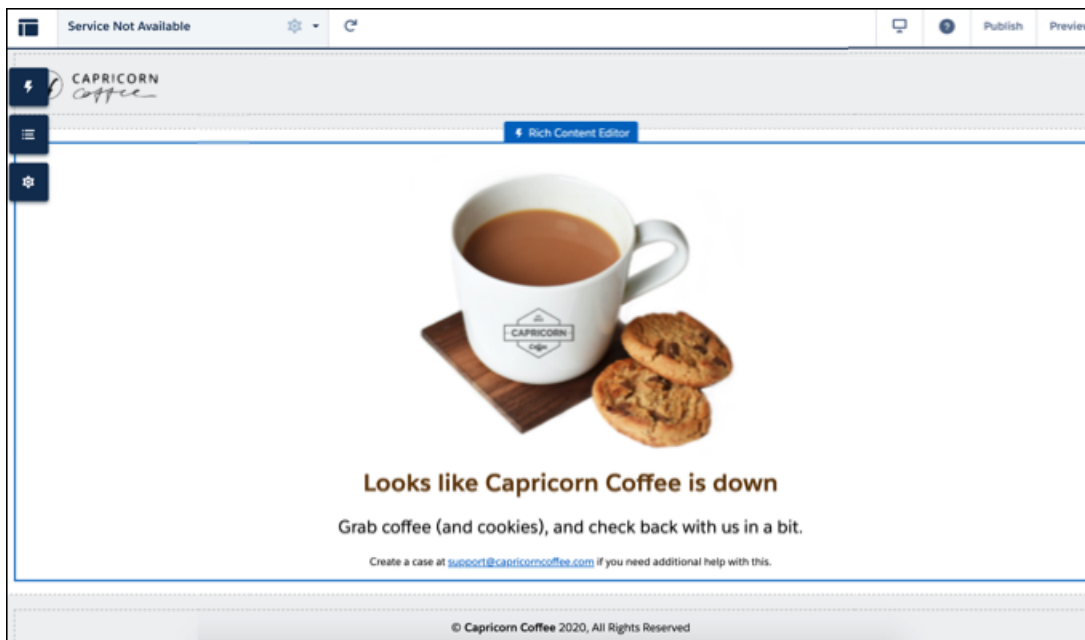
> **Note:** This pilot feature isn't compatible with the static Service Not Available page in **Administration** > **Pages**.

Use a Single Certificate Domain for Your Content Delivery Network (Pilot)

Protect your brand by switching from a shared certificate to a single branded certificate. The content delivery network (CDN) manages the certificate for you, so you can set it and forget it.

Where: This change applies to Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

> **Note:** We support single certificate domain 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. The single certificate domain is 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 in the Experience Cloud group in the Trailblazer Community.

How: When you configure your site's domain, choose the single certificate domain option. Users who inspect your certificate see only your brand on the certificate.

Add Salesforce CMS Content to Custom Lightning Web Components

Readily add Salesforce CMS content to Experience Builder sites using custom Lightning web components. After you publish content in a CMS workspace, you can enhance any custom component with your content repositories at the click of a button.

Where: This change applies to Experience Builder sites with Salesforce CMS, accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Configure CMS content for a custom Lightning web component by specifying `type="ContentReference"` for the component property type in the .js-meta.xml file. You can also configure your component to filter for a specific content type. For example, to display only published images from your CMS workspace, specify `filter="cms_image"`, as shown:

```
<property type="ContentReference" name="contentId" label="Content ID" filter="cms_image"/>
```

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata" fqn="contentRef">
    <apiVersion>45.0</apiVersion>
    <isExposed>true</isExposed>
    <targets>
        <target>lightningCommunity__Page</target>
        <target>lightningCommunity__Default</target>
    </targets>
    <targetConfigs>
        <targetConfig targets="lightningCommunity__Default">
            <property type="String" name="title" label="Title" default="Nameless" />
            <property type="ContentReference" name="contentId" label="Content ID" filter="cms_image"/>
            <property type="Color" name="bgColor" label="Background Color" default="rgba(0, 255, 255, 1)" />
        </targetConfig>
    </targetConfigs>
    <masterLabel>Content Reference Component</masterLabel>
</LightningComponentBundle>
```

In Experience Builder, add the component to the page and click **Add Content** in the component's properties. Add images, documents, news articles, and more directly to your site from your CMS workspace.

Lightning Message Service Now Supported in Experience Cloud (Beta)

Use Lightning message service to communicate across the Document Object Model (DOM) within an Experience Builder site page. Communicate between Aura and Lightning web components in Experience Builder site pages.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

> 📝 Note: As a beta feature, Lightning Message Service in Experience Cloud 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 Experience Cloud group in the Trailblazer Community.

`lightning:navigation` in Aura Sites Now Supports generateUrl with More actionNames

The `lightning:navigation` component now supports generateURL using a pageReference with the New, Edit, and Clone actionNames. Previously, only the View actionName was supported. Standard record pages with edit and clone actions and standard object pages with a new action now return a URL that can be used to navigate to the action specified by the pageReference. The behavior of the navigate call using `lightning:navigation` hasn't changed.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Navigate to CMS Content Pages Using a PageReference

In Lightning components, you can use the navigation service's new `standard__managedContentPage` pageReference type to navigate to CMS content pages in an Experience Builder site.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Guest User Security Policies Enforced

Salesforce is enforcing a variety of guest user security policies, including reducing object permissions for guest users.

View All, Modify All, Edit, and Delete Object Permissions Removed for Guest Users

Salesforce is removing the View All, Modify All, edit, and delete object permissions on all objects for guest users in new and existing orgs. These permissions are removed for custom objects and standard objects. Guest users can only have read and create object permissions.

Where: This change applies to all Salesforce orgs with guest users in Enterprise, Performance, Unlimited, and Developer editions.

How: The View All, Modify All, edit, and delete object permissions are permanently removed and can't be enabled for guest users in profiles or permission sets.

If the View All, Modify All, edit, and delete object permissions are part of a permission set or permission group and assigned to a guest user, then the guest user is removed from the permissions set or permission set group. Guest users also lose access to other permissions that are included in those permission sets and permission set groups.

If guest users are removed from permissions sets or permission set groups because they have the Modify All, View All, edit, or delete object permissions, and lose other functionality, clone the permission set with the permissions allowed, and assign the new permission set to the guest user.

Obsolete Permissions from Guest User Profiles Were Removed

Obsolete permissions with no app logic tied to them were removed from guest user profiles.

Where: This change applies to all Salesforce orgs with guest users in Enterprise, Performance, Unlimited, and Developer editions.

How: These permissions are removed from all guest user profiles in all orgs.

- Enable UI Tier Architecture
- Remove People from Direct Messages
- View Topics
- Send Non-Commercial Email
- Share internal Knowledge articles externally
- Hide the Seen By List
- Enable RecordVisibility API
- Assign Topics
- Verify Answers to Chatter Questions
- Close Conversation Threads
- Edit Topics
- Create Topics
- Delete Topics
- Merge Topics
- Allow user to access privacy data

- Modify Data Classification
- Use Any API Client
- Can Approve Feed Post and Comment

Security and Sharing

Find out about enhanced security for users with standard external profiles, as well as a new cookie setting for Experience Builder sites.

IN THIS SECTION:

Users with Standard External Profiles Can No Longer Log In To Experience Cloud Sites

Users with standard external profiles can no longer log in to Experience Cloud sites such as communities and portals.

Set Preferences for Allowed Cookies for Experience Builder Sites

A new setting in Experience Builder lets you decide what types of cookies are allowed on your site by default.

Hide First and Last Name Fields in SOAP API for Experience Cloud Site Users

Now when your users make API calls from a site with nicknames enabled, you can hide the first and last name fields in SOAP API for Experience Cloud site users.

Users with Standard External Profiles Can No Longer Log In To Experience Cloud Sites

Users with standard external profiles can no longer log in to Experience Cloud sites such as communities and portals.

Where: This change applies to all Experience Cloud sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change applies to all Salesforce 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: Users in your org who are assigned to the above external standard profiles can no longer log into Experience Cloud sites such as communities and portals. To give access to your Experience Cloud users, clone the standard external profile that they're assigned to, and change object permissions to meet your business needs. Then assign the cloned profile to the users who access the site.

To still use standard profiles to allow login, enable the Allow using standard external profiles for self-registration and user creation setting in **Setup** > **Digital Experiences** > **Settings**. Enabling this permission is not a Salesforce security best practice.

Set Preferences for Allowed Cookies for Experience Builder Sites

A new setting in Experience Builder lets you decide what types of cookies are allowed on your site by default.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

> **Note:** This feature is available with Lightning sites only.

How: Access the Security & Privacy page in Experience Builder. In the Allowed Cookies section, turn on the **Allow only required cookies for this site** setting if you want required cookies only on your site. If you don't turn on the setting, your site allows all cookies, including required and functional types.

Hide First and Last Name Fields in SOAP API for Experience Cloud Site Users

Now when your users make API calls from a site with nicknames enabled, you can hide the first and last name fields in SOAP API for Experience Cloud site users.

Where: This change applies to all Experience Cloud sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Enable the **Hide first and last name fields in the SOAP API for site users, when making API calls from within a site with nicknames enabled** setting in **Setup** > **Digital Experiences** > **Settings**. The setting is on by default in orgs created after February 18, 2021.

> **Note:** This setting works with the **Show nicknames** setting, which is set site by site. Enable **Show nicknames** for each site that you want to hide name fields for. Access Experience Workspaces for each site (**SetupDigital Experiences All SitesWorkspaces [of each site]**). Enable **Show nicknames** in the Administration workspace and save.

Other Changes

Learn about smaller changes that improve your experience with Experience Cloud.

IN THIS SECTION:

Hide Fields in Lightning Knowledge Search Results

A new site preference lets you use a grid layout for Lightning Knowledge Search results. After you enable grid layout, you can edit Knowledge search layouts to show or hide grid fields for selected Knowledge profiles.

Where: This change applies to Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: To use this feature, first enable Knowledge in your Salesforce org. Then, in your site's Administration Workspace, go to **Preferences** > **General**, and select the **Use a profile-based layout for Lightning Knowledge search results** checkbox. Save your changes. Go to the Object Manager, click the Knowledge object, and click **Search Layouts**. Edit selected layouts to show or hide different fields.

📝 Note: When you enable the standard grid layout, search term highlighting isn't available in results.

Add Multiple Files to Records in the Experience Cloud Sites on Mobile

You can quickly add multiple files to your records on the go. An Add Files button is now included in the Files Related list of each record for Experience Cloud sites on mobile.

Where: This change applies to Experience Builder sites accessed through mobile publisher apps in Enterprise, Performance, Unlimited, and Developer editions.

How: In the mobile experience, open a record. Then click **Related** > **Files** > **Add Files**. Select files to upload or add files from your org.

Process Members More Smoothly with Enforced Limits

The number of members that are added to or removed from a permission set or profile affects processing times. The number of members that can be processed per profile or permission set is now limited to 10 million at a time.

Where: This change applies to Experience Cloud sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to users with the Create and Setup Experiences permission.

How: To avoid exceeding these limits, add members in small batches, using multiple permission sets or profiles. To increase these limits, contact Support.

Merge Customer-Enabled Person Accounts

Keep records for customer-enabled accounts free of duplicates so you can reach more customers and maintain better relationships with them. Now admins can merge person accounts from customer-enabled communities using the merge wizard.

Where: This change applies to Experience Cloud sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature applies to users with the Manage External Users permission. Users also need permissions to delete accounts and edit related records such as opportunities and contacts.

Build Reports on Question Response Time

For each question asked in a peer-to-peer forum, you now can build reports that answer the questions: How long does it take for a question to get a first comment? How long does it take for a question to get the best answer? You can also calculate the average time to first comment and time to best answer over time for a specific set of topics or Chatter groups.

Where: This change applies to Experience Builder sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: Community managers who can create reports.

Why: The time to first comment and the time to resolution are standard metrics used in the service industry to gauge when to increase service levels.

How: To start building these reports, in Setup enter *Report Types* in the Quick Find box. Click **Report Types** and then click **New Custom Report Type**. Choose **Network Feed Responses Metrics** In the Report Type Focus section as the primary object and continue on as you would creating any other report.

> **Note:**
> - These metrics can only be calculated for questions and not for other types of Chatter posts.
> - These metrics can only be calculated for questions created after the Spring '21 release is available in your org.

Salesforce CMS

Do more with your Salesforce CMS content than ever before. Deploy consistent content using content key, add it to the new Build Your Own (LWR) template for Experience Builder sites, and export it to other orgs and workspaces.

IN THIS SECTION:

Your Salesforce CMS content now has a content key. This unique identifier sticks with your content no matter the version and across Salesforce orgs, sites, and components. Use the content key to deploy content between orgs, such as sandbox to production, with export and import JSON files in .zip archives.

Include the content key in the JSON content details to create references to media files for content import. Associate references in the `ref` field or the rich text editor node (RTE), which now creates a managed user content record for images in the RTE node.

Previously, to import local files with JSON, the `status` field was required for each piece of content. The `status` field is no longer used for content in Salesforce CMS. Now you can choose to publish all content in your import at once in the Salesforce CMS app. Use this feature for your media import to publish all images that are referenced by other content to keep all references in place.

Export content, such as images, news, documents, or custom content types, from a workspace in Salesforce CMS to .zip archives of JSON files and media files. Transfer content to another Salesforce org by importing the exported .zip archive.

Now you can use the content key to export content from sandbox and import it to production. Then deploy single item components with the experience bundle from sandbox to production. Previously, you recreated your content when you moved CMS components from sandbox to production.

Google is protecting users from insecure downloads by blocking mixed-content downloads in Chrome. An example of a mixed content download is placing a link to an HTTP site on an HTTPS page. This change affects insecure images and links in Salesforce CMS and CMS Connect. Google's phased rollout plan begins with a browser warning and then advances to blocking mixed-content downloads.

The new Build Your Own (LWR) template for Experience Cloud lets you develop sites that load quickly and scale well to deliver your CMS content. Based on Lightning Web Components (LWC), a programming model that delivers exceptional performance, this lightweight template supports fully custom solutions.

Now you can add published content from your Salesforce CMS workspace to a custom Lightning web component and use it in an Experience Builder site.

With the new Build Your Own (LWR) template for Experience Cloud, you can add CMS images directly to your site via the Rich Content Editor component.

Keep Things Consistent with Content Key

Your Salesforce CMS content now has a content key. This unique identifier sticks with your content no matter the version and across Salesforce orgs, sites, and components. Use the content key to deploy content between orgs, such as sandbox to production, with export and import JSON files in .zip archives.

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.

How: When you add new content to a Salesforce CMS workspace, we automatically assign a content key that sticks with that content as it's updated and versioned.

SEE ALSO:

Salesforce Help: Add Content in Salesforce CMS (can be outdated or unavailable during release preview)

Salesforce Help: Prepare and Import Content Into Salesforce CMS (can be outdated or unavailable during release preview)

Use the Content Key to Reference Media for Import

Include the content key in the JSON content details to create references to media files for content import. Associate references in the `ref` field or the rich text editor node (RTE), which now creates a managed user content record for images in the RTE node.

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: When you specify the content details in JSON files, enter the content key of the media content in the `ref` field to create a reference for import. You can also enter the content key of media content in a rich text editor (RTE) node, like the body of a news item, instead of the `ref` field. This method creates a managed content record for images and displays the information in the Used By card on the content detail page.

Here's an example of the `JSON` structure for importing a news item that references an image using the image's content key.

```
{
"content":[
    {
    "contentKey": "MC4NFMB52LHFFWPNFNKHQJHLFBQM",
    "type":"news",
    "urlName":"content1",
    "body":{
        "title":"My News Item",
        "body":"<p>This is the body of my news item, which includes a reference to an image
 in Salesforce CMS.</p>,
        "bannerImage": {
            "ref":"MCFQ2WJD3O6NGCXOI3DIOF4RJQOI"
            },
        "excerpt":"This is a summary of my news item."
        }
    }]
}
```

Here's an example of the `JSON` structure for a news item that references an image in the rich text editor.

```
{
"content":[
    {
    "contentKey": "MC4NFMB52LHFFWPNFNKHQKJLMNFR",
    "type":"news",
    "urlName":"content2",
    "body":{
        "title":"Another News Item",
        "body":"<img src=' ' data-contentKey=' 'MCFQ2WJD3O6NGCXOI3DIOF4RJQOI'>,
        "excerpt":"This is a summary of my news item."
        }
```

```
        }]
}
```

Bulk Publish Content After Import

Previously, to import local files with JSON, the `status` field was required for each piece of content. The `status` field is no longer used for content in Salesforce CMS. Now you can choose to publish all content in your import at once in the Salesforce CMS app. Use this feature for your media import to publish all images that are referenced by other content to keep all references in place.

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: Import content in the Salesforce CMS workspace and select **Publish content after import** to change the status of all the content in your import to published. If the content is already in your CMS workspace, it replaces your last published version. The published content is immediately available to use in all channels, updated in your live site, and in all content references.

We recommend that you use this feature to publish images that are referenced by other content after import. If you don't select this option, your content imports in the draft status and you can publish content individually through Salesforce CMS.

SEE ALSO:

Salesforce Help: Prepare and Import Content Into Salesforce CMS (can be outdated or unavailable during release preview)

Export Content from Your Salesforce CMS Workspace

Export content, such as images, news, documents, or custom content types, from a workspace in Salesforce CMS to .zip archives of JSON files and media files. Transfer content to another Salesforce org by importing the exported .zip archive.

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

Who: To export content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

How: Open the workspace in Salesforce CMS, select the content and folders to export, click the menu dropdown and select **Export Content**. Optionally, include referenced images if the images in your export were updated or are different from the version in the CMS workspace you're importing them into.

During export the content details for each content item export to individual JSON files in a.zip archive. All media content exports to a separate .zip archive and all other content exports to another. For example, when news content references a banner image, the banner image and the news content export to separate .zip archives such as 1-media-content-[jobId].zip and 2-content-[jobId].zip. When you import the .zip archives into a Salesforce CMS workspace, import the media .zip archive first, then import the corresponding content export .zip archive.

SEE ALSO:

Deploy CMS Content and Components from Sandbox to Production

Deploy CMS Content and Components from Sandbox to Production

Now you can use the content key to export content from sandbox and import it to production. Then deploy single item components with the experience bundle from sandbox to production. Previously, you recreated your content when you moved CMS components from sandbox to production.

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

Who: To import or export content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

How: To move your content, first export content from your Salesforce CMS workspace, and then import the content into Salesforce CMS.

> **Note:** CMS Collection components aren't included when you import or export in Salesforce CMS. Recreate your CMS Collection in the CMS destination org. If you use the same name for the collection, it's not necessary to add it to the component again after you recreate it. CMS Collection components retain content references when you use the same name for the collection.

SEE ALSO:

Keep Things Consistent with Content Key

Salesforce Help: Prepare and Import Content Into Salesforce CMS (can be outdated or unavailable during release preview)

Export Content from Your Salesforce CMS Workspace

Lightning Communities Developer Guide: Deploy a Community from Sandbox to Production

Lightning Communities Developer Guide: ExperienceBundle for Lightning Communities

Mixed Content Downloads Blocked in Google Chrome

Google is protecting users from insecure downloads by blocking mixed-content downloads in Chrome. An example of a mixed content download is placing a link to an HTTP site on an HTTPS page. This change affects insecure images and links in Salesforce CMS and CMS Connect. Google's phased rollout plan begins with a browser warning and then advances to blocking mixed-content downloads.

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

When: Google's effort began in September 2020 and continues through the next several Chrome releases.

Why: For more information, see the Knowledge article, Chrome Blocking Mixed Content in Salesforce CMS and CMS Connect.

Take Advantage of the Build Your Own (LWR) Template for Experience Cloud

The new Build Your Own (LWR) template for Experience Cloud lets you develop sites that load quickly and scale well to deliver your CMS content. Based on Lightning Web Components (LWC), a programming model that delivers exceptional performance, this lightweight template supports fully custom solutions.

Where: This change applies to Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)

Use Your Salesforce CMS Content in Custom Lightning Web Components

Now you can add published content from your Salesforce CMS workspace to a custom Lightning web component and use it in an Experience Builder site.

Where: This change applies to Experience Builder sites with Salesforce CMS, accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: In the Salesforce CMS app, create and publish content in a Salesforce CMS workspace. Make sure that the workspace is connected to your Experience Builder site.

To access your CMS content from a custom component in Experience Builder, configure the custom component to include the `ContentReference` property type. Then, in Experience Builder, add the component to the page and click **Add Content** in the component's properties. Now you can fill your site with images, documents, news articles, and much more directly from your CMS workspace.
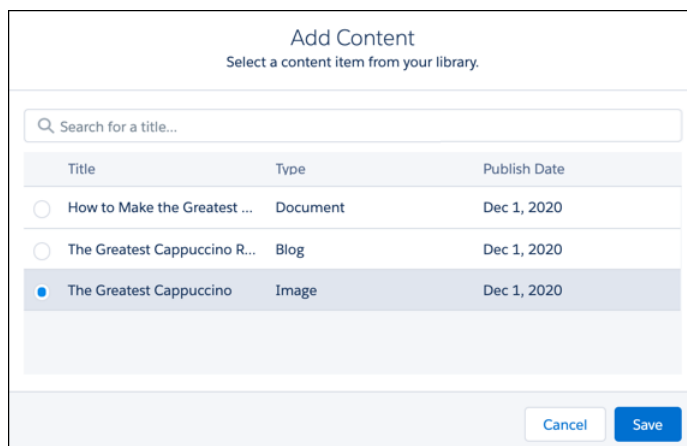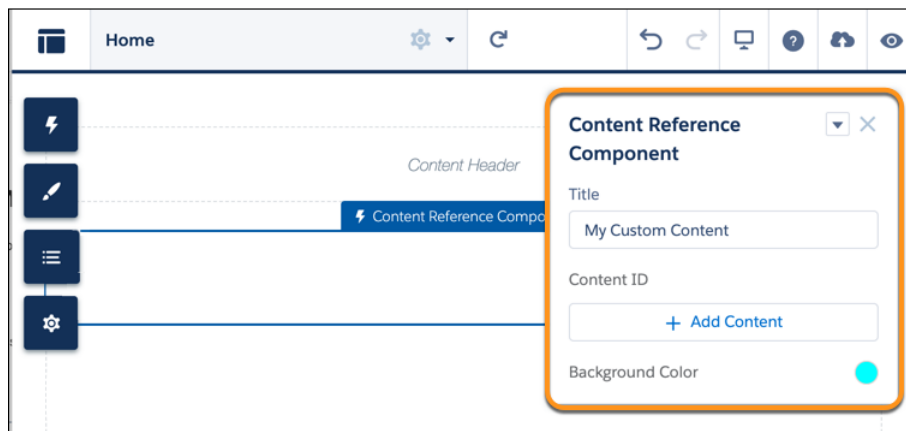
SEE ALSO:

Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)

Add Salesforce CMS Content to Custom Lightning Web Components

Add CMS Images with the Rich Content Editor in the Build Your Own (LWR) Template

With the new Build Your Own (LWR) template for Experience Cloud, you can add CMS images directly to your site via the Rich Content Editor component.

Where: This change applies to Experience Builder sites using the Build Your Own (LWR) template with Salesforce CMS, accessed through Lightning Experience and Salesforce Classic. The template is available in Developer Edition and when you purchase Salesforce CMS in Enterprise, Performance, and Unlimited editions.

How: Make sure your CMS Workspace is connected to your Build Your Own (LWR) site, and publish the images you want to use.

Open your Build Your Own (LWR) site in Experience Builder. Navigate to the Components menu and select the Rich Content Editor component. Drag the component to add it to your site. From the Rich Content Editor component window, click **Edit Content**. Then, select to access your CMS content and add an image.

SEE ALSO:

 Build Fast, Efficient Experiences with the Build Your Own (LWR) Template (Generally Available)

Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for iOS and natural language search on mobile. Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud and comes with iPad support.

IN THIS SECTION:

Salesforce Mobile App

View customizable cards on a new Mobile Home page, filter records using natural language search on mobile, and use the Salesforce Quick Navigation widget to get to your most important items from the home screen of your iOS device.

Mobile Publisher

Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud. iPad is officially supported for those users who prefer to work on tablet.

Salesforce Mobile App

View customizable cards on a new Mobile Home page, filter records using natural language search on mobile, and use the Salesforce Quick Navigation widget to get to your most important items from the home screen of your iOS device.

IN THIS SECTION:

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features includes a new Salesforce home screen for iOS, activity timeline for Android, and more.

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 includes a new Salesforce home screen for iOS, activity timeline for Android, and more.

Where: 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.

When: For Android, most features become available for the Salesforce mobile app the week of February 15, 2021. For iOS, most features have been delayed to March 2021.

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 412	✔	✔	
Data Access and Views			
Get Comfortable in Mobile Home (Beta) on page 413		✔	✔
Navigation and Actions			
Tap Into Salesforce from Your Home Screen with the Quick Navigation Widget on page 416		✔	
Improved Scrolling is the New Standard on page 416	✔	✔	
Productivity Features			
Keep Track of Your Activities with Activity Timeline on Android on page 416	✔		
Use Dynamic Actions with Custom Objects on Mobile on page 416	✔	✔	✔
Access and Security			
Get Ready for Changes to Apple's Privacy Policy on page 417		✔	
New Enhanced Mobile Security Setup UI (Beta) on page 417			✔
Protect Your Data with Enhanced Mobile Security Updates on page 418	✔	✔	✔
Setup			
Improve Lightning Page Performance on Mobile on page 419	✔	✔	✔
Miscellaneous Enhancements			
Turn on the New Salesforce Mobile App Tablet Experience on page 419	✔	✔	✔

SEE ALSO:

Adjust Your 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 Spring '21.

Platform	Phones	Tablets
Android	• Google Pixel 4 XL • Google Pixel 3 • Samsung Galaxy S10 / S10+ / S10e • 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 12 Pro / Pro Max / mini • iPhone 12 • iPhone 11 Pro / Pro Max • iPhone 11 • iPhone XR • iPhone XS / XS Max • iPhone X • iPhone 8 / 8 Plus • iPhone 7 / 7 Plus • iPhone SE • iPhone 6S	• iPad Pro 10.5" • iPad Air 2 • iPad Mini 4

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce sometimes can't replicate some issues for customers using Salesforce on untested devices on 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.

Get Comfortable in Mobile Home (Beta)

Welcome to your new home! When you use Mobile Home, you're greeted by a set of customizable, dynamic cards that show personalized information. View your reports, upcoming events, recent records, and more. Your cards display information that's based on how you use the app, and you can easily rearrange, add, and remove cards right in the app. When Mobile Home is turned on, it's the landing page and first tab for all iOS users.

Where: This change applies to the Salesforce mobile app for iOS in all editions, except Database.com.

How: To turn Mobile Home on for your users, add a connected app attribute. From Setup, in the Quick Find box, enter `Connected Apps`, select **Manage Connected Apps**, then click the name of the connected app that you want to modify. Unless you use Mobile Publisher, it's the Salesforce for iOS connected app. In the Custom Attributes section on the connected app page, click **New**. Enter `ENABLE_MOBILE_HOME` for the attribute key and `"true"` for the attribute value.
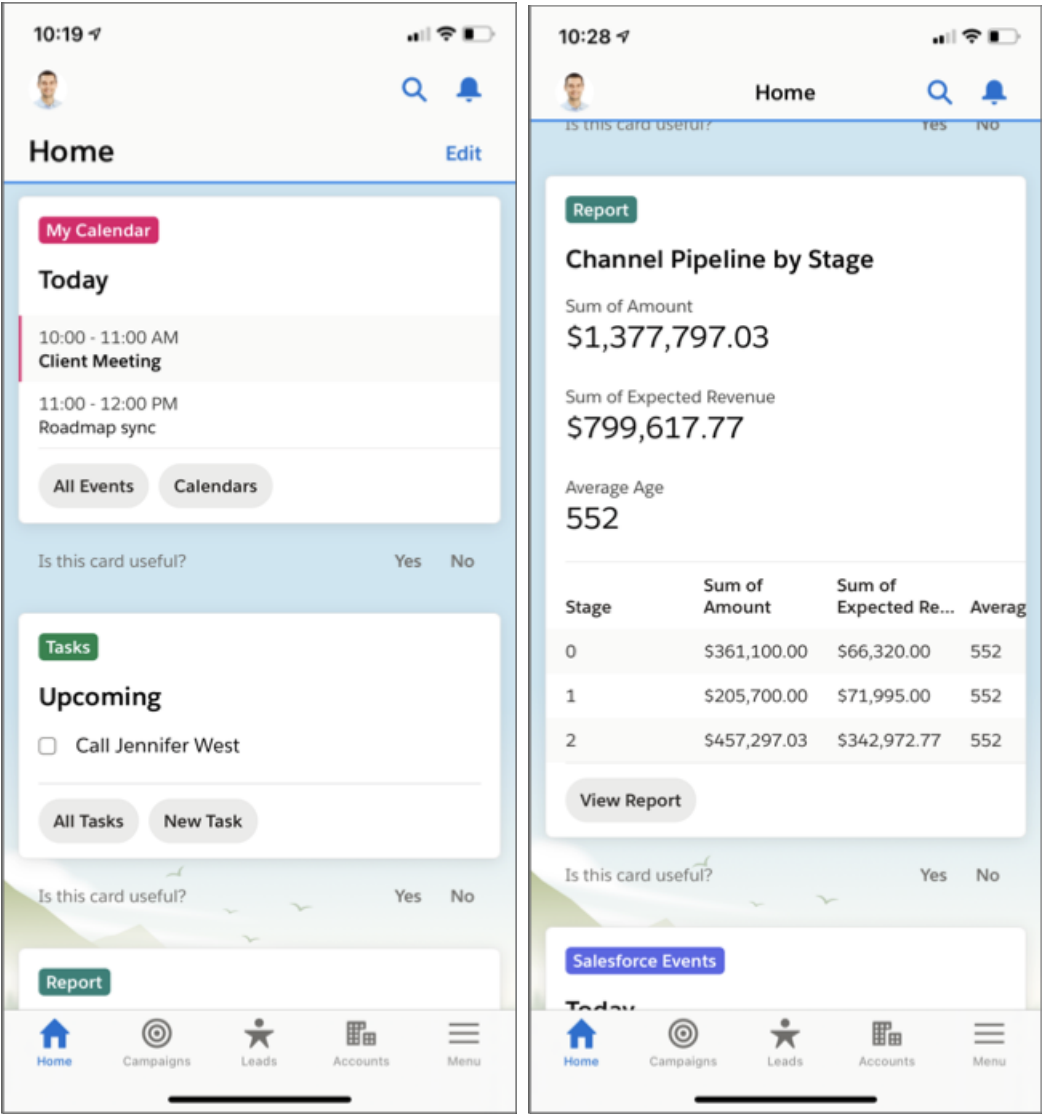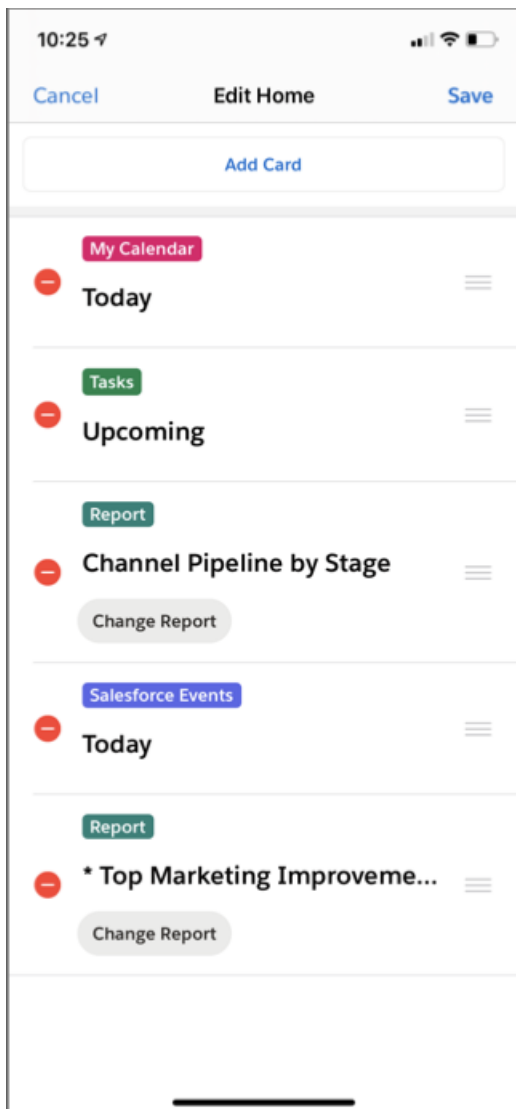
📝 **Note:** As a beta feature, Mobile Home is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't 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 Home in the Lightning on Mobile Trailblazer Community or the Salesforce for iOS/Android Trailblazer Community.

SEE ALSO:

Salesforce Help: Enable Mobile Home for iOS (Beta) (can be outdated or unavailable during release preview)

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

Use the Salesforce Quick Navigation widget to get to your most important items right from the home screen of your iOS device. The widget displays the first four navigation items of the navigation bar of the Lightning app you most recently accessed in the Salesforce mobile app, including Mobile Only. And if you personalize your navigation items for a Lightning app, the widget updates accordingly.

Where: This change applies to the Salesforce mobile app for iOS in all editions, except Database.com.

Who: This change is available to users running iOS 14 or higher.

How: To get the Salesforce Quick Navigation widget, press and hold anywhere on your Home Screen. Tap the **+** icon, then search for `Salesforce Navigation`. Select the Salesforce Quick Navigation widget and add it to your Home Screen.

Improved Scrolling is the New Standard

Cruise through the Salesforce app without making any updates. With improved scrolling, 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.

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.

Keep Track of Your Activities with Activity Timeline on Android

One of your favorite features for iOS is now available on Android. The activity timeline is available in the Salesforce mobile app for leads, opportunities, accounts, and contacts. On these record types, users can view all the tasks, events, logged calls, and emails associated with a record in one convenient feed. Previously, admins created a related list with the activity history view to track activities in the mobile app.

Where: This change applies to the Salesforce mobile app for Android in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: End users are big fans of the activity timeline because it lets them pick up where they left off and focus on 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. From Setup, in the Quick Find box, enter `Connected Apps`. Select **Manage Connected Apps**, and 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_ACVITITY_TIMELINE` for the attribute key and `"true"` for the attribute value.

Use Dynamic Actions with Custom Objects on Mobile

Dynamic actions for custom objects are now generally available on mobile devices. 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.

SEE ALSO:

    More Support for Dynamic Actions

Get Ready for Changes to Apple's Privacy Policy

In the most recent version of iOS, Apple placed additional tracking restrictions on third-party applications. This affects the Spring 2021 version of the Salesforce mobile app, which goes live on February 15, 2021. These new restrictions can prevent your custom web content from appearing in the Salesforce mobile app for iPhone and iPad. Test the Spring 2021 beta version of the Salesforce app before it goes out to your users.

Where: This change applies to the Salesforce mobile app for iOS in all editions, except Database.com

Who: These configurations can be affected.

- Visualforce pages
- Third-party content rendered via Canvas, or custom Lightning components using <iframe>
- Third-party applications using cookies, sessionStorage, or localStorage

Why: Apple announced that iOS 14 has additional restrictions on third-party content. To protect users' privacy, cookies and other storage aren't available to external applications by default in WKWebView, which is used to render web content in the Salesforce mobile app (and all other iOS apps). See WebKit's documentation on Intelligent Tracking Prevention in WKWebView for more details. The Salesforce mobile app gets updated to the latest Apple standards in Spring 2021 and these restrictions to WKWebView then take effect.

How: Sign up for the Salesforce mobile beta program at mobilebeta.salesforce.com.

We recommend that you update your third-party integrations to use methods that don't rely on cookies. For more information on best practices, see this blog post. We understand it can take time to make these configuration changes. In the meantime, your users can allow third-party content to appear in the Salesforce app by updating their device settings.

Enhanced Domains are designed to work with Apple ITP.

To unblock third-party content for the Salesforce app only, on an iOS device that's running iOS 14+, go to **Settings** > **Salesforce** and turn on Allow Cross-Website Tracking. Taking this step doesn't compromise your privacy for any other apps.

New Enhanced Mobile Security Setup UI (Beta)

Enabling and configuring mobile security policies is as easy as toggling a switch.

Where: Available for an extra cost for the Salesforce mobile app in all editions, except Essentials and Database.com.

> Note: We provide the new Mobile Security Setup UI to customers through a Beta program. 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.

Who: Available for users with the Enforce Enhanced Mobile App Security user permission.

Why: Before the Spring '21 release, you had to configure a connected app attribute for each mobile security policy that you wanted to enable. With the new Mobile Security Setup UI, we want to make it as easy as toggling a switch to enable mobile security policies for your org.

How: In Setup, search for `Mobile Security` and select **Mobile Security**. Select either the iOS or Android tab to enable and configure mobile security policies for your org.
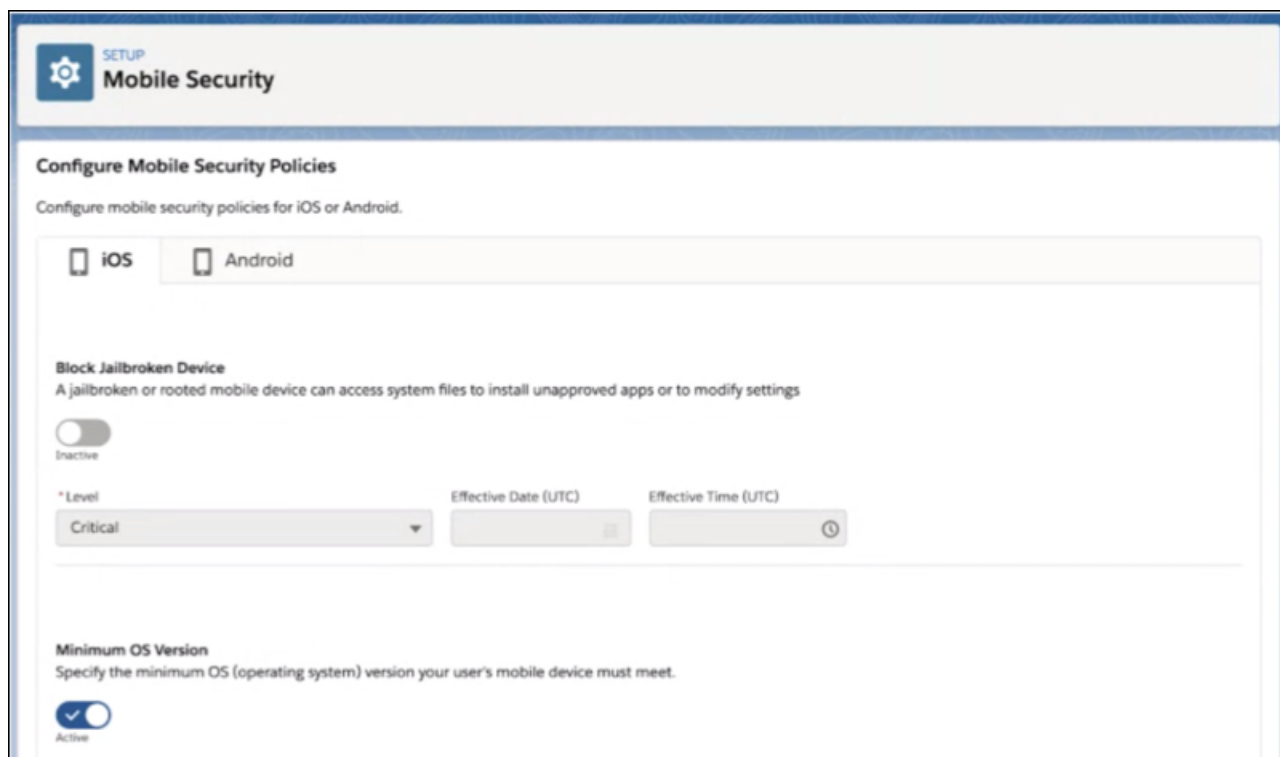
SEE ALSO:

Salesforce Help: Mobile Application Management (MAM) with Enhanced Mobile App Security

Protect Your Data with Enhanced Mobile Security Updates

More protection has been built into the enhanced mobile security for the Salesforce mobile app. You can now enforce new policies such as checking biometric login credentials every time a user opens the app. These new policies further secure your Salesforce app data and users' personal data.

Where: Available for an extra cost for the Salesforce mobile app in all editions, except Essentials and Database.com.

Who: Available for users with the Enforce Enhanced Mobile App Security user permission.

Why: Enhanced mobile security updates include enforcing users to authenticate biometric ID login every time they open the app. You can also block access to calendar and contacts on a user's device. Lastly, you can specify a phone call app for user's to make phone calls with.

How: In Setup, search for `Mobile Security` and select **Mobile Security**. Select either the iOS or Android tab to enable and configure mobile security policies for your org.
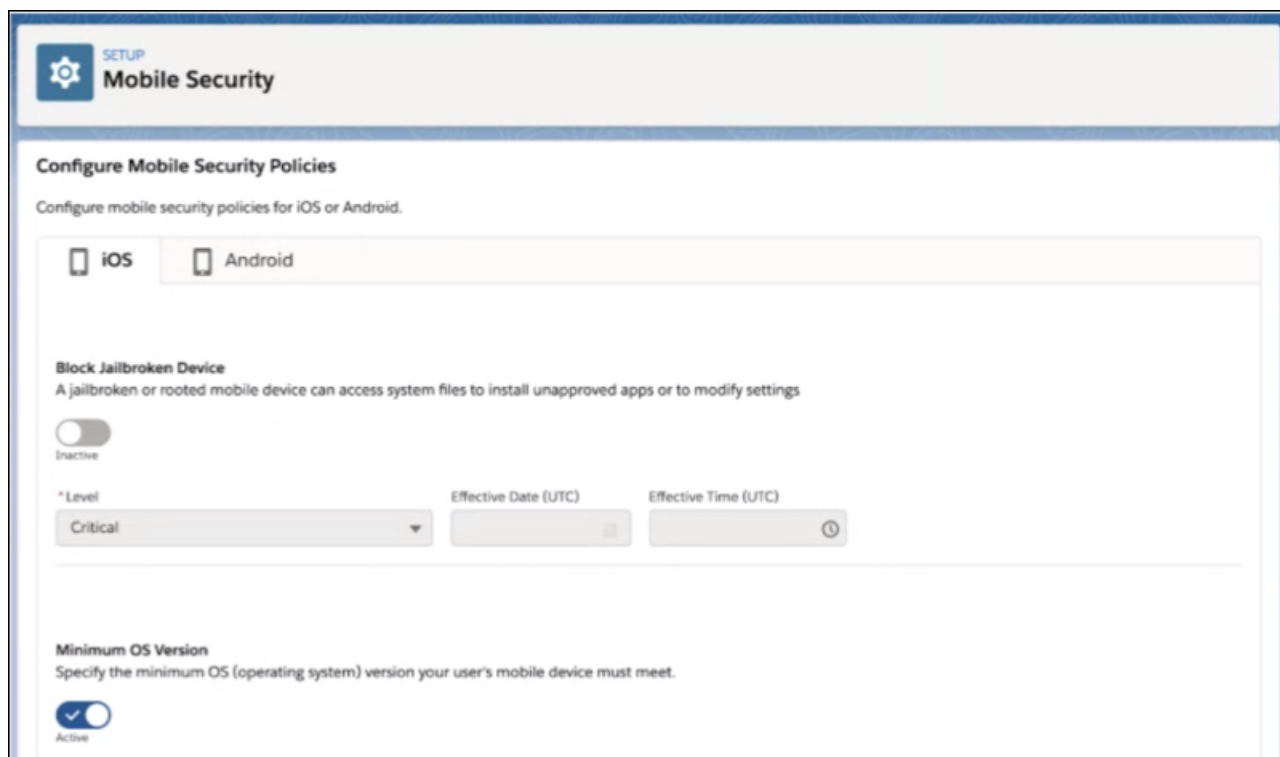
SEE ALSO:

   Salesforce Help: Mobile Application Management (MAM) with Enhanced Mobile App Security

Improve Lightning Page Performance on Mobile

When you design a Lightning record page, Guidance for App Builder now offers specialized tips for Lightning pages on phones. New tabs in the Page Analysis docked prompt give you insight into how your page performs on a phone.

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

SEE ALSO:

   Get Tips for Phone-Enabled Lightning Pages in Guidance for App Builder

   Analyze Performance For Lightning Pages Viewed on a Phone

Turn on the New Salesforce Mobile App Tablet Experience

Choose whether your tablet users see the new or the previous tablet experience. This single-column layout matches what users see on their desktop and phone. It supports Lightning apps, Lightning navigation, and Lightning record pages. Previously, you had access only if you were in the pilot or logged a case.

Where: This change applies to the Salesforce mobile app for Android and iOS on tablets in all editions, except Database.com.

How: To turn on the new Salesforce mobile app tablet experience, from Setup, in the Quick Find box enter `Quickstart`, and then select **New Salesforce Mobile App Quickstart**. You can turn it on in the New Salesforce Mobile App for Tablet section.
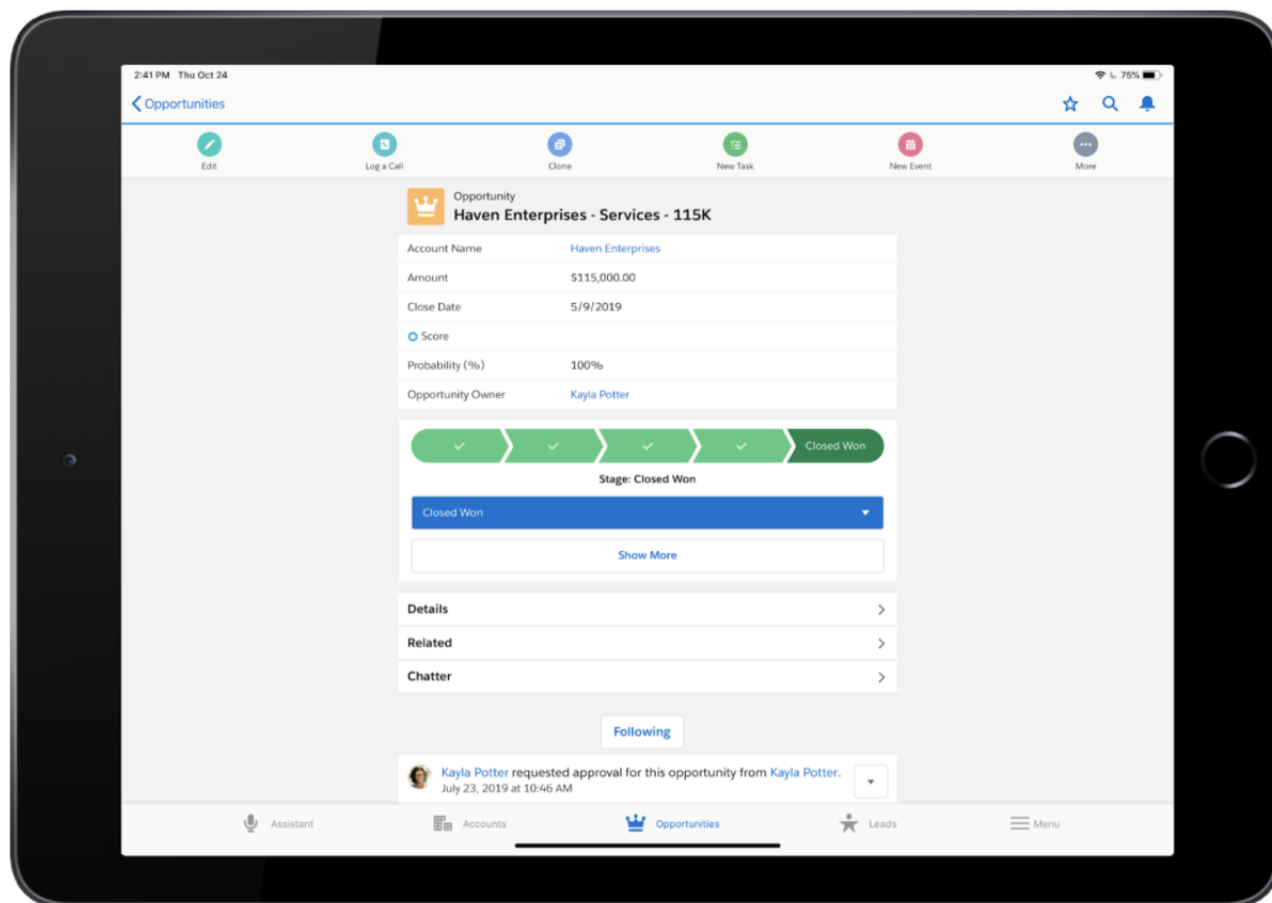
App Store and Google Play Updates

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.

230.010

This version of the Salesforce mobile app is available the week of March 1, 2021.

230.020

This version of the Salesforce mobile app is available the week of March 15, 2021.

Mobile Publisher

Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud. iPad is officially supported for those users who prefer to work on tablet.

IN THIS SECTION:

Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud

The powerful tool that helps you brand your own Salesforce Lightning Communities is now renamed Mobile Publisher for Experience Cloud. All the awesome features are still available, but all product and documentation references say Mobile Publisher for Experience Cloud instead of Mobile Publisher for Communities.

Mobile Publisher for Experience Cloud iPad Support (Generally Available)

Users who want to experience your branded Experience Cloud app on a tablet can now rejoice with iPad support.

Managed Public Distribution No Longer Supported for Android

Mobile Publisher no longer supports Managed Public Distribution of customer branded apps for Android.

Mobile Publisher for Communities is now Mobile Publisher for Experience Cloud

The powerful tool that helps you brand your own Salesforce Lightning Communities is now renamed Mobile Publisher for Experience Cloud. All the awesome features are still available, but all product and documentation references say Mobile Publisher for Experience Cloud instead of Mobile Publisher for Communities.

Where: This change applies to Mobile Publisher and Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: We renamed Communities to Experience Cloud to better reflect the many types of connected digital experiences you can create—including portals, websites, help centers, forums, and mobile app.

SEE ALSO:

Hello Experience Cloud, Farewell Community Cloud

Mobile Publisher for Experience Cloud iPad Support (Generally Available)

Users who want to experience your branded Experience Cloud app on a tablet can now rejoice with iPad support.

Where: This change applies to Mobile Publisher and Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: Available for users who can access an Experience Cloud site and meet mobile device requirements.

Why: We want to offer users the option of using your branded Experience Cloud app on more devices to suite their preferences.

How: You can choose to opt in to iPad support for your branded Experience Cloud app in Mobile Publisher.
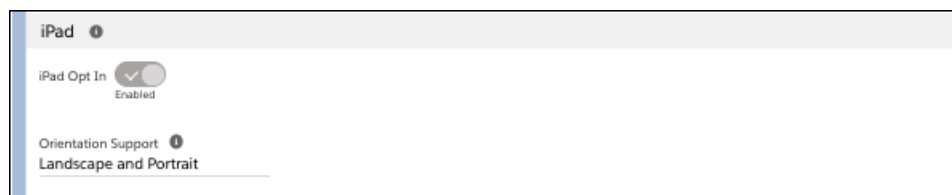
After you've decided to opt in to iPad support, you can choose support three orientation modes:

- Portrait only
- Landscape only
- Landscape and Portrait

Keep in mind that components that work in one orientation mode may not work with another. For example, if your component works in Portrait mode, it may not work as expected in Landscape mode. Use the Publisher Playground app to test and confirm that your components work in your preferred orientation mode.

> **Note:** If you decide to opt in to iPad support, you can't stop supporting iPad devices for the current version or any future versions of your branded Experience Cloud app.

SEE ALSO:

> *Salesforce Help*: Preview Your Mobile Experience Cloud Site with the Publisher Playground App (Beta)

Managed Public Distribution No Longer Supported for Android

Mobile Publisher no longer supports Managed Public Distribution of customer branded apps for Android.

Where: This change applies to Mobile Publisher in Enterprise, Performance, Unlimited, and Developer editions.

Who: New Mobile Publisher customers don't have the option to choose Managed Public Distribution for their branded apps.

> **Note:** Existing Mobile Publisher customers who already distribute their branded apps through Managed Public Distribution aren't be affected by this change.

SEE ALSO:

> *Salesforce Help*: Distribution

Salesforce Sustainability Cloud

Resolve issues with your carbon footprint record data with Data Gap Filling. Individually lock or unlock energy use records with Individual Locking Control.

For the latest information, see the monthly release notes on the *Trailblazer Community*: Sustainability Cloud or *Partner Community*: Sustainability Cloud.

IN THIS SECTION:

Resolve Carbon Footprint Record Issues with Data Gap Filling

Now you can use system estimates to fill energy use data gaps for commercial buildings and data centers when you calculate their annual carbon footprint. Or you can enter data manually.

Manage Energy Use Records with Individual Locking Control

Individual Locking Control helps determine whether to recalculate an energy use record after a change in the related carbon footprint record.

Resolve Carbon Footprint Record Issues with Data Gap Filling

Now you can use system estimates to fill energy use data gaps for commercial buildings and data centers when you calculate their annual carbon footprint. Or you can enter data manually.

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

Who: Data Gap Filling is available to users with the Sustainability Cloud Allow Data Gap Filling permission set.

Why: Data gaps, or incomplete information for carbon footprint records, can happen for various reasons. Examples of data gaps include:

- Energy use records share an organization asset and a reporting period with a carbon footprint record but aren't linked to the carbon footprint record
- Two or more separate energy use records cover the same reporting period
- Missing monthly electricity usage data

How: The Fill Data Gaps button is a Lightning Action that you add to the Commercial Building and Data Center page layouts after an upgrade. To get the button, in the Page Layout Editor, choose Mobile & Lightning Actions, then drag the Fill Data Gaps button into the Salesforce Mobile and Lightning Experience Actions page section.

Manage Energy Use Records with Individual Locking Control

Individual Locking Control helps determine whether to recalculate an energy use record after a change in the related carbon footprint record.

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

Who: Individual Record Locking is available to users with the Sustainability Cloud Allow Record Locking permission.

Why: By default, energy use records are locked when related carbon footprint records are locked. This default prevents the data on the carbon footprint record from getting out of sync. With the Individual Locking Control checkbox checked, you can unlock and alter the data on an individual energy use record. You can alter the data even if the related carbon footprint record is locked. Affected energy use records have the read-only Record Locked checkbox, under Carbon Footprint Report Items, checked.

Customization

Access prior record values and reduce automation time and maintenance costs with Salesforce Flow. Build recommendations and predictions confidently and easily with improvements to Einstein Recommendation Builder and Einstein Prediction Builder. Configure more flexible and better-performing Lightning pages in the Lightning App Builder.

IN THIS SECTION:

Salesforce Flow

Lightning Flow is now called Salesforce Flow. Record-triggered flows can now access prior values of the triggering record and can run scheduled paths after the triggering event. Test and troubleshoot flows more easily with debugging tool enhancements. Enjoy usability improvements that make building and running flows easier on the eyes.

Einstein Builders

Einstein Recommendation Builder is generally available and checks your data as you go. Build predictions for managed packages with Einstein Prediction Builder.

Lightning App Builder

Create localized tab, attribute, and component labels on your Lightning pages with Localization Support in App Builder. Add flexibility and control to actions on your record pages with Dynamic Actions, now generally available for select standard objects on desktop and for custom objects on mobile. The Performance Analysis tool now gives you more detailed information about your Lightning record page performance on both desktop and phone.

Globalization

The offshore Chinese yuan and Amharic language are now available, users can read Hebrew right to left in more clouds, and you can enable new locale formats via a release update.

External Services

With External Services, you can connect to a service of your choice, invoke methods based on the external source via a flow, and import data from the service into Salesforce.

Salesforce Flow

Lightning Flow is now called Salesforce Flow. Record-triggered flows can now access prior values of the triggering record and can run scheduled paths after the triggering event. Test and troubleshoot flows more easily with debugging tool enhancements. Enjoy usability improvements that make building and running flows easier on the eyes.

IN THIS SECTION:

CPU time consumption by flows and processes is now accurately measured and enforced. 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. Respect the public access modifiers for legacy Apex actions.

These updates affect only flows and processes that are configured to run on API version 51.0 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.

Lightning Flow Is Now Salesforce Flow

The Lightning Flow suite of features is now called Salesforce Flow, and it still includes all your processes and flows. Lightning Flow Builder and Lightning Process Builder are now called Flow Builder and Process Builder.

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

Flow Builder

Access prior values of records and add scheduled paths on record-triggered flows. The Send Email action now supports rich text format and catches invalid email addresses and sender types at run time. Optimize your flow screens with sections and columns (beta). Add Apex actions with callouts to your screen flows without fear of run-time failures caused by elements executed earlier in the same transaction.

IN THIS SECTION:

Now when a record is updated, you can access that record's prior values in Salesforce Flow. The `$Record__Prior` global variable contains the record's values immediately before the flow was run. Use these prior values to check for changes and calculate differences in your flow.

Add a scheduled path to your record-triggered flow if you want part of the flow to run at a dynamically scheduled time after the triggering event occurs. You can base the scheduled time on when the record is created or updated or on a field value in the record. Scheduled paths run in system context, so they have permission to access and modify all data. But the running user associated with the flow's actions is the user who triggered the flow to run.

Send an email in rich text format by using a Send Email action. Previously, only plain text was available for Send Email actions, and you used an email alert to send a rich text email.

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. The multicolumn screen layout is responsive, so columns stack vertically to fit on mobile phones. This feature, which is now beta, includes changes since the pilot release. The Section component now supports conditional visibility. Multicolumn screens also benefit from improved styling for screen components, which is a separate, generally available feature.

Control Revisited Screen Component Values in Flows

One size doesn't fit all when it comes to revisited screen component values, so now you can choose to refresh the values. When a user navigates to a previous screen, then proceeds forward to a screen that they visited already, the flow can refresh screen component values. Changes elsewhere in the flow are incorporated in the refreshed values. Previously, a screen component always used the same values that the user entered. The options for revisited screen component values are available only for Lightning components.

Avoid Callout Errors in Screen Flows Automatically

If you build flows that make callouts, also known as external API calls, you probably know this error: `System.CalloutException: You have uncommitted work pending.` You can now configure your screen flows to automatically avoid the callout error. Previously, we recommended adding a local action or a screen element between your callout and any data operations, but that's no longer necessary.

Enjoy Improved Styling for Flow Screen Components

Whether for text, email, phone, address, or picklist components, flow screens offer a cohesive, coherent look. Now all Salesforce-provided components take up the full width of their container, whether that's a standard screen or a multi-column screen. And components are consistently aligned and spaced, with equivalent padding and margins.

Avoid Repetitive Lightning Runtime Warnings in Screen Flows

If your Salesforce org is configured to render all URL-based flows in Lightning runtime, Flow Builder no longer displays a warning for every screen that requires Lightning runtime.

See Less {!Complex.Syntax} in Flow Builder

More places in Flow Builder now use pills to represent your references to records, fields, variables, and other flow resources. Pills display relevant icons and labels, which you can click anytime to see the underlying `{!Syntax}`. Pills are now available in more fields in the Create Records, Update Records, Get Records, and Delete Records elements.

View Flow Label in Browser Title from Debug or Flow Runtime

When you run a flow, you can now see its label in the browser tab title and easily identify the flow. Previously, the browser tab displayed the unreadable flow URL. If you use a screen reader, it picks up the flow label from the browser tab title.

Access Complex Merge Fields from Loops

Now you can loop through a collection via merge fields on complex objects such as an Apex-defined variable or output from a custom action or screen component. Previously, you weren't able to access merge fields on complex objects.

Discover Issues with Send Email Actions Earlier

Before Spring '21, a Send Email action failed to send if it included no recipients, an invalid email address, or an invalid sender type. As of Spring '21, the email still fails to send if it includes one of these errors, but the associated error handling is improved.

Refer to the Prior Values of the Record That Triggered Your Flow

Now when a record is updated, you can access that record's prior values in Salesforce Flow. The `$Record__Prior` global variable contains the record's values immediately before the flow was run. Use these prior values to check for changes and calculate differences in your flow.

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, you need the View All Data permission.

Why: For example, to notify the Opportunity Team when an opportunity's amount changes by 30% or more, compare the `$Record.Amount` to the `$Record__Prior.Amount`. To determine the percentage of the change, you can create a formula such as `({$!Record.Amount} - {!$Record__Prior.Amount}) / {!Record__Prior.Amount}`. Use a Decision element to check the formula's result and a Send Email or Post to Chatter action to perform the notification.

How: You can use the `$Record__Prior` global variable in record-triggered flows that are set to trigger either when the record is updated or when the record is created or updated. `$Record__Prior` is available in specific Flow Builder locations that read from global variables, including:

- Formulas
- Action input values
- Assignment values
- Decision outcomes
- Filters and individual field values when creating, updating, getting, or deleting records

Run Part of a Record-Triggered Flow After the Triggering Event

Add a scheduled path to your record-triggered flow if you want part of the flow to run at a dynamically scheduled time after the triggering event occurs. You can base the scheduled time on when the record is created or updated or on a field value in the record. Scheduled paths run in system context, so they have permission to access and modify all data. But the running user associated with the flow's actions is the user who triggered the flow to run.

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

Why: If you're familiar with scheduled actions in Process Builder or time-dependent actions in workflow rules, know that scheduled paths on record-triggered flows can accomplish the same goals and more.
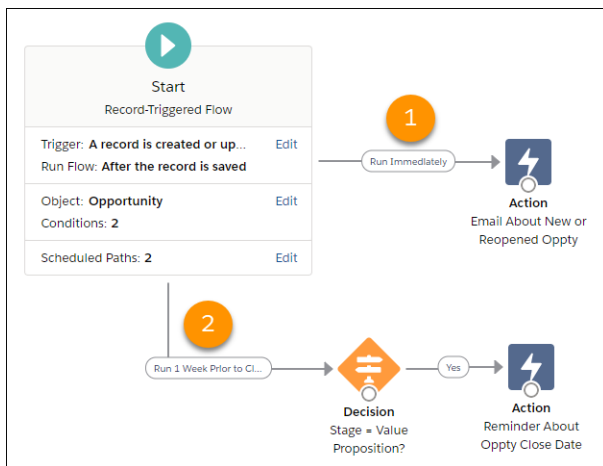
This record-triggered flow has two paths. When an opportunity is created or updated, the flow runs these separate interviews at different times.

- Immediately after the opportunity is created or updated (1), the flow notifies the opportunity owner about the new or reopened opportunity.

- One week before the close date (2), if the opportunity is still in the Value Proposition stage, the flow emails a reminder to the opportunity owner.

How: Scheduled paths are available for record-triggered flows that run after the record is saved. When you open a flow, the option to add scheduled paths is on the Start element.
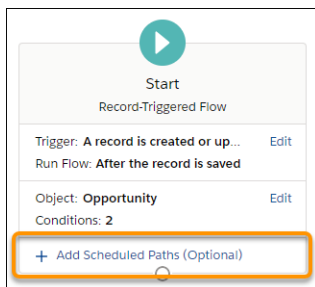
If you don't see the option to add scheduled paths, check whether your flow can be triggered to run when a record is updated. If yes, configure the flow to run for updated records only when a record is updated to meet the condition requirements.

Add your scheduled paths to the Start element.

Build the flow paths that you want to execute at the scheduled times. When you connect your Start element to another element, choose from the scheduled paths.

- The maximum scheduled-path interviews per 24 hours is 250,000, or the number of user licenses in your org multiplied by 200, whichever is greater. One interview is created for each executed scheduled path on a record-triggered flow. Paths that run immediately don't count toward this limit.

- If the flow can be triggered by record updates with Time Source set to be based on a field value such as `dueDate`, consider this behavior. If Time Source is set to a future time and condition requirements are met, the scheduled path executes at that new time regardless of whether the scheduled path already executed. You can use this record trigger configuration to schedule recurring actions on a record by updating the record's date field.

When a new or updated record triggers your flow to run, the scheduled paths are queued until they run. You can monitor these and other pending automations on the Time-Based Workflow page in Setup.
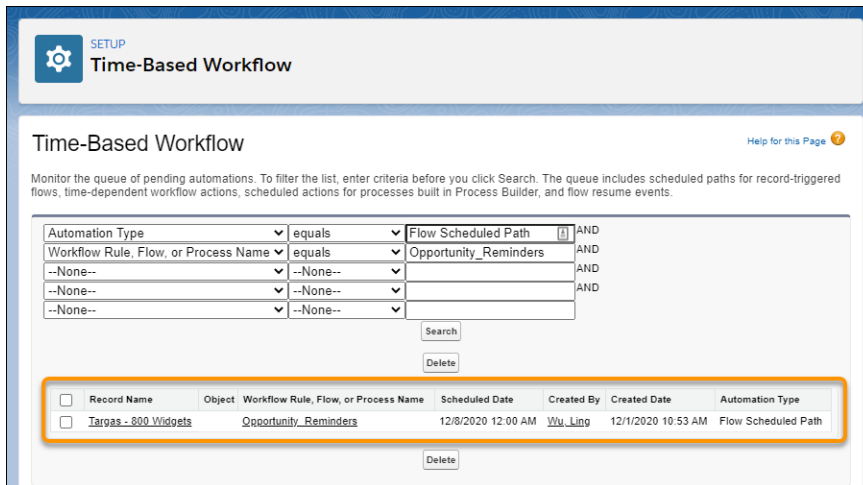
Note: Previously, the Time-Based Workflow page listed only time-dependent workflow actions. Now the page also lists these types of pending automations in the queue.

- Scheduled paths for record-triggered flows
- Scheduled actions for processes that are built in Process Builder
- Time-based resume events for paused flow interviews

The Object column displays the associated object only for workflow actions.

Scheduled paths are available in these debug log events.

- FLOW_SCHEDULED_PATH_QUEUED—An event is logged when a scheduled path is added to the queue after a record is created or updated.

```
10:53:01:196 FLOW_SCHEDULED_PATH_QUEUED Run_1_Week_Prior_to_Close_Date|Targas - 800
Widgets|006RM000003FWT3|-7|Days|Tue Dec 08 08:00:00 GMT 2020
```

- FLOW_VALUE_ASSIGNMENT—An event is logged when a scheduled path runs.

```
12:01:16:214 FLOW_VALUE_ASSIGNMENT
165c6cb998920ba685bab7c1e1761f92a07e-7fce|start__scheduledPath|Run_1_Week_Prior_to_Close_Date
```

Send Rich Text Emails from Your Flow Using a Send Email Action

Send an email in rich text format by using a Send Email action. Previously, only plain text was available for Send Email actions, and you used an email alert to send a rich text email.

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

Why: Rich text format gives you more options when you send an email from a flow. Now you can include bullets, bold or italicize text, and embed images. Any formatting you can apply in a rich text template or a display text component, you can also apply to your email body.

How: Drag an Action element onto the canvas. In the Action field, enter `Email`, and select **Send Email**. By default, flow emails are sent in plain text. To send the body in rich text, include **Rich-Text-Formatted Body**, and set it to true.

> 💡 Tip: We recommend writing your email body in a text template, and then referencing it in the Send Email action. That way, you have access to the formatting tools and have the space to write more than one line. To add a table or other advanced markup to your email, create a text template. In rich text mode, paste in the table. Or in plain text mode, write the HTML for your table and then switch to rich text mode to render it properly.

SEE ALSO:

Build Multicolumn Screens in Flow Builder (Beta)

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. The multicolumn screen layout is responsive, so columns stack vertically to fit on mobile phones. This feature, which is now beta, includes changes since the pilot release. The Section component now supports conditional visibility. Multicolumn screens also benefit from improved styling for screen components, which is a separate, generally available feature.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Multicolumn screens are supported only in Lightning runtime for flows.

> 📝 Note: As a beta feature, Flow Multicolumn Screens 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 Flow Multicolumn Screens in the Flow Multicolumn Screens Beta group in the Trailblazer Community.

How: In Flow Builder, use the Section component to easily arrange screen components into multiple columns. In this sample screen, a section contains three columns of equal width.
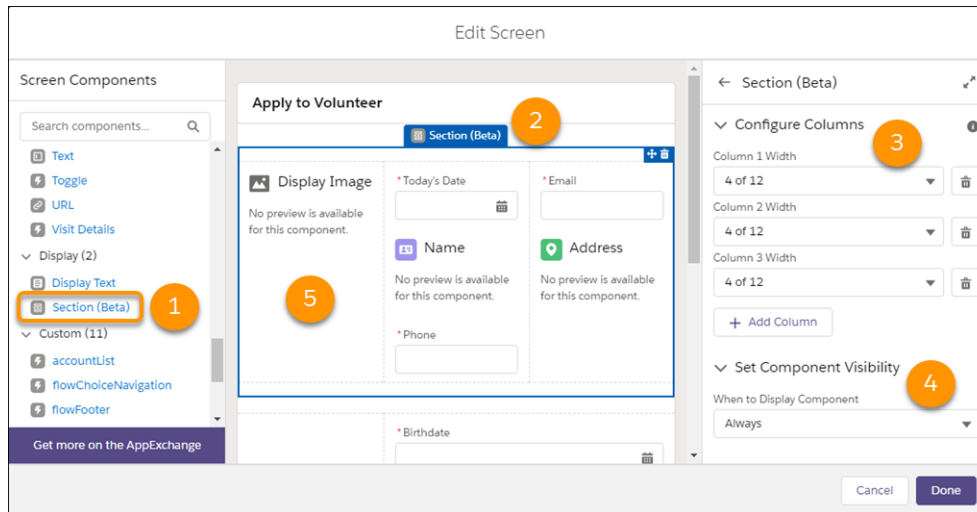
As you edit a screen in Flow Builder, drag the Section component (1) onto the screen canvas (2). In the Section component's attributes, add columns and set their widths (3). If you don't want the section to always appear, change its component visibility (4). Then drag other screen components into the columns on the screen canvas (5).

At run time, the screen from the previous example looks as follows.
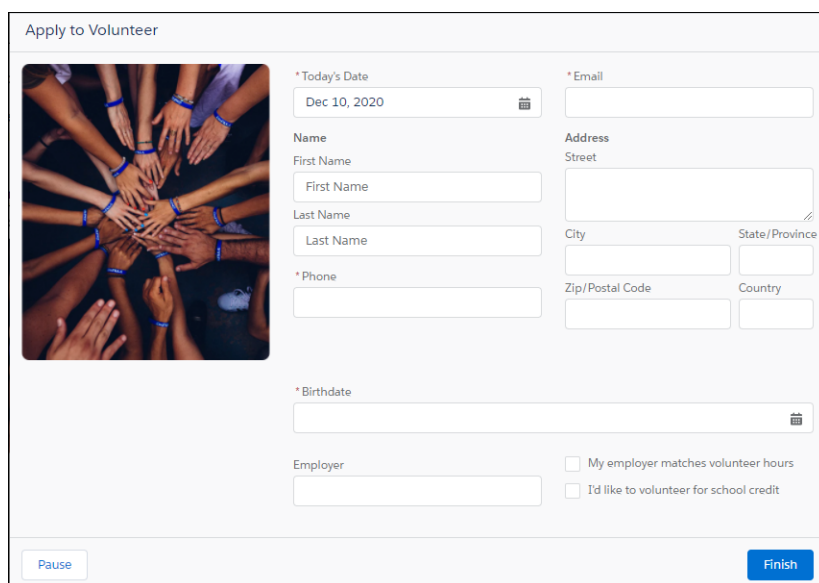
Here's how the same screen appears on a mobile phone.

Enjoy Improved Styling for Flow Screen Components

Trailblazer Community: Flow Multicolumn Screens Beta group

Control Revisited Screen Component Values in Flows

One size doesn't fit all when it comes to revisited screen component values, so now you can choose to refresh the values. When a user navigates to a previous screen, then proceeds forward to a screen that they visited already, the flow can refresh screen component values. Changes elsewhere in the flow are incorporated in the refreshed values. Previously, a screen component always used the same values that the user entered. The options for revisited screen component values are available only for Lightning components.

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

Why: To incorporate values that changed elsewhere in the flow, you can choose the option that refreshes input values on a screen component. For example, a user enters their ZIP code on the first screen. When the user goes to the second screen, it automatically enters field values based on the ZIP code. The user goes back to change their ZIP code on the first screen. When the user revisits the second screen, its fields are refreshed based on the new ZIP code.

To retain the values that a user enters on a screen component, you can choose the option that employs values from the user's last visit to the screen. For example, a user completes contact information on the second screen. The user goes back to the first screen to check overview information. When the user revisits the second screen, their contact information is still there. Existing flows with screen components default to this option.

How: Drag a Lightning component such as the Toggle screen component, Slider screen component, or custom screen component to a screen. From the component's properties pane, select **Advanced**, and select an option for Revisited Screen Values.
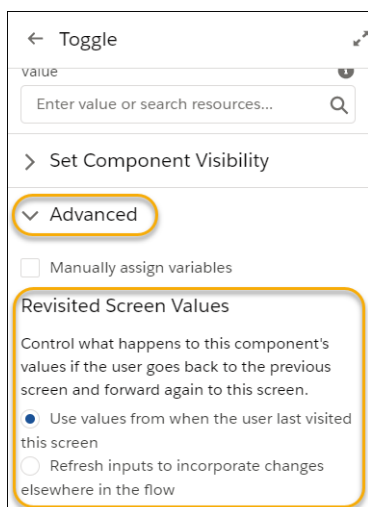
Metadata API

Avoid Callout Errors in Screen Flows Automatically

If you build flows that make callouts, also known as external API calls, you probably know this error: `System.CalloutException:` `You have uncommitted work pending.` You can now configure your screen flows to automatically avoid the callout error. Previously, we recommended adding a local action or a screen element between your callout and any data operations, but that's no longer necessary.

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

Why: If the current transaction has uncommitted work pending, a flow can't perform a callout. Uncommitted work is usually an email or a data operation such as a created record. Previously, to execute the callout in a separate transaction, you added a local action or screen between the data operation and the callout.

How: Configure actions to automatically let the flow determine at run time whether a new transaction is required to successfully execute the action.

If the action was configured in	Default action behavior is
Spring '21 or later	**Let the flow decide (recommended)**
Winter '21 or earlier	**Always continue the current transaction**

> 💡 Tip: For screen flows, Salesforce recommends letting the flow decide to be the best way to control the transaction. For actions configured in Winter '21 or earlier, change the transaction control to **Let the flow decide (recommended)**.

The transaction control option is available for the action under the Advanced setting for all custom actions, and for standard actions only if they perform a callout.

Salesforce Help: Flows in Transactions

Flow and Process Run-Time Improvements in API Version 51.0

Enjoy Improved Styling for Flow Screen Components

Whether for text, email, phone, address, or picklist components, flow screens offer a cohesive, coherent look. Now all Salesforce-provided components take up the full width of their container, whether that's a standard screen or a multi-column screen. And components are consistently aligned and spaced, with equivalent padding and margins.

Where: This change (styling enhancements) applies only to Lightning runtime and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: These improvements apply to all flow screens in Lightning runtime, including multi-column screens. And while this change doesn't affect the styling of custom screen components, you can ask your developer to adjust the styling for your custom components.

To make sure that your custom components are styled consistently with the Salesforce-provided components, apply extra-small bottom margins (`slds-m-bottom_x-small`) to the outer layer of your component.

SEE ALSO:

Build Multicolumn Screens in Flow Builder (Beta)

Avoid Repetitive Lightning Runtime Warnings in Screen Flows

If your Salesforce org is configured to render all URL-based flows in Lightning runtime, Flow Builder no longer displays a warning for every screen that requires Lightning runtime.

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

Why: Flow admins found the warnings to be more clutter than help.
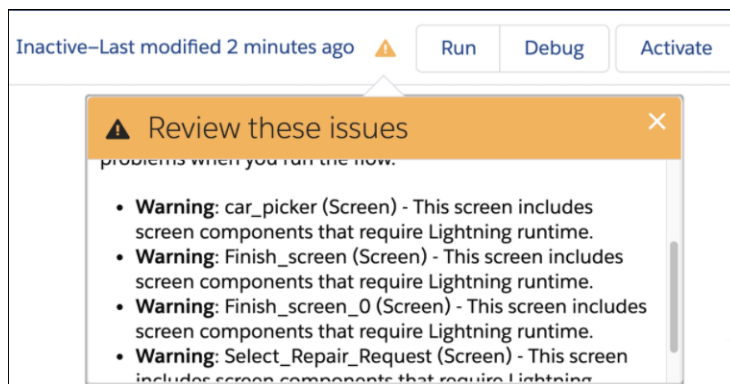
Flow Builder still shows these warnings when your org isn't configured to render all URL-based flows in Lightning runtime. In this case, flows launched from a URL or from Setup use the Classic runtime experience, which doesn't support:

- Conditional visibility
- Section components for multi-column screens
- Custom screen components
- Provided screen components that require Lightning runtime, such as Address, Dependent Picklists, Name, and Slider

You can set the runtime experience for URL-based flows in your org's process automation settings.

Whether or not you see Lightning runtime warnings as you build screen flows, this guideline hasn't changed: If your flow contains a screen that requires Lightning runtime, distribute the flow in ways that run only in Lightning runtime.

SEE ALSO:

Salesforce Help: Set the Runtime Experience for URL-Based Flows

Salesforce Help: Lightning Runtime vs. Classic Runtime for Flows (can be outdated or unavailable during release preview)

Salesforce Help: Make Flow Screens Dynamic with Conditional Visibility

Salesforce Help: Build Rich Screens with Custom Screen Components

See Less `{!Complex.Syntax}` in Flow Builder

More places in Flow Builder now use pills to represent your references to records, fields, variables, and other flow resources. Pills display relevant icons and labels, which you can click anytime to see the underlying `{!Syntax}`. Pills are now available in more fields in the Create Records, Update Records, Get Records, and Delete Records elements.

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

How: When you select a record variable or record collection variable, the syntax of the reference appears. In this example, the automatically stored output from a Get Records element is selected in an Update Records element.

Select Record(s) to Update
* Record or Record Collection
{!Get_Account}
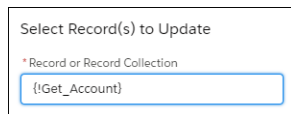
When you leave the field, a pill replaces the syntax.
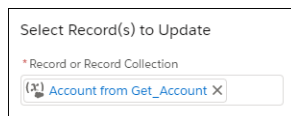
Select Record(s) to Update
* Record or Record Collection
Account from Get_Account ✕

View Flow Label in Browser Title from Debug or Flow Runtime

When you run a flow, you can now see its label in the browser tab title and easily identify the flow. Previously, the browser tab displayed the unreadable flow URL. If you use a screen reader, it picks up the flow label from the browser tab title.

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.

How: You see the flow label in the browser tab title when you run the flow with:

- A custom button or link
- A direct URL
- The Run button or link in Setup
- The Debug button in Setup

Access Complex Merge Fields from Loops

Now you can loop through a collection via merge fields on complex objects such as an Apex-defined variable or output from a custom action or screen component. Previously, you weren't able to access merge fields on complex objects.

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

How: From a Loop element, select the collection on the object.

Discover Issues with Send Email Actions Earlier

Before Spring '21, a Send Email action failed to send if it included no recipients, an invalid email address, or an invalid sender type. As of Spring '21, the email still fails to send if it includes one of these errors, but the associated error handling is improved.

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

Why: Now a warning message prevents you from activating a new or existing flow if a Send Email configuration doesn't include at least one email recipient. And a validation message informs you that when you save a new or existing flow, it can fail at run time if a Send Email configuration includes an invalid email address or sender type.

For flows that are saved and activated, run-time improvements now catch the same three errors.

Note: While the two recipient parameters in a Send Email action are treated as optional, you must provide a value for at least one of them.

SEE ALSO:

Send Rich Text Emails from Your Flow Using a Send Email Action

Flow Debugging

Debugging tool enhancements make it easier to test and troubleshoot your flows. Many error emails now contain a link that opens Flow Builder, where you can see the interview's path on the canvas and the error details. Debug schedule-triggered flows and autolaunched flows with no triggers directly on the canvas (generally available).

IN THIS SECTION:

Debug Failed Flows More Easily

No more scrolling through a long flow error email to figure out what went wrong during the run. Now you can simply click a link in the error email to open Flow Builder and see the failed flow interview's path on the canvas. The detailed error information appears next to the canvas.

Debug Flows More Easily with Consistent Terms and Direct Debugging for Schedule-Triggered Flows

In addition to nontriggered autolaunched flows, debugging directly on the canvas now supports schedule-triggered flows. Also, we updated the text in flow debug details and error emails to match Flow Builder's element names: Create Records, Update Records, Get Records, and Delete Records.

See Accurate Flow Information in Debug Logs

Debug logs now record the total amount of CPU time consumed by a particular flow or process in the FLOW_INTERVIEW_FINISHED_LIMIT_USAGE log lines. Also, the FLOW_INTERVIEW_LIMIT_USAGE log lines now accurately record the CPU time consumed by flows and processes that are configured to run in API version 51.0 or later.

Debug Failed Flows More Easily

No more scrolling through a long flow error email to figure out what went wrong during the run. Now you can simply click a link in the error email to open Flow Builder and see the failed flow interview's path on the canvas. The detailed error information appears next to the canvas.

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

Who: To open failed flow interviews in Flow Builder, you need the Manage Flows permission.

Why: Previously, debugging flows from the flow error email was labor-intensive. This improvement makes flow debugging much easier and more efficient.

Failed flow interviews for these flow types that are built with the free-form layout in Flow Builder are saved and available to open in Flow Builder.

- Screen flows
- Record-triggered flows
- Schedule-triggered flows
- Autolaunched flows that aren't triggered

Failed flow interviews aren't saved if:

- The flow is installed as part of a managed package and isn't a template.
- The failure occurs after the flow interview is paused then resumed at least once.
- The error is handled because the element that encounters the error is connected to a fault connector.
- The failure occurs during an Apex test method.
- The flow is a standard flow.
- The value of the flow's metadata field `status` is `Draft` or `InvalidDraft`.

Failed flow interviews don't count toward data, file, or paused flow interview storage limits. When failed flow interviews are saved, they're available for up to 14 days, then they're automatically deleted from the database.

These limits apply when failed flow interviews are saved.

- For any specific flow, no more than 100 failed flow interviews are saved in a 24-hour period.
- For a batch of up to 200 failed flow interviews in the same transaction, one interview is saved.

- Across all the flows in an organization, no more than 3,000 failed flow interviews are saved in a 24-hour period.

- Failed flow interviews exceeding 1 MB aren't saved.

- Failed flow interviews aren't saved if more than 1 GB of failed flow interviews are already saved in the database.

We also updated the names of flow elements in flow error emails and the debug details in Flow Builder.

- Fast Lookup is now Get Records

- Fast Update is now Update Records

- Fast Delete is now Delete Records

How: In a flow error email, click **Flow Error: Click here to debug the error in Flow Builder**.

Debug Flows More Easily with Consistent Terms and Direct Debugging for Schedule-Triggered Flows

In addition to nontriggered autolaunched flows, debugging directly on the canvas now supports schedule-triggered flows. Also, we updated the text in flow debug details and error emails to match Flow Builder's element names: Create Records, Update Records, Get Records, and Delete Records.

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

How: To debug schedule-triggered and nontriggered autolaunched flows directly on the canvas, click **Debug on Canvas**.
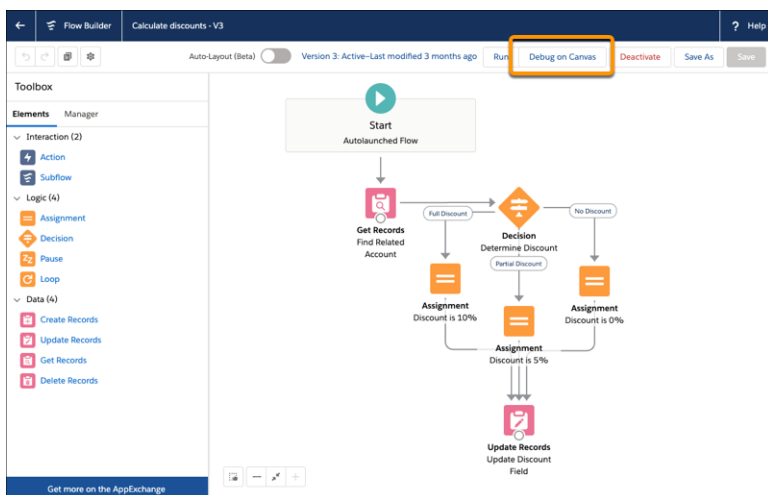
Optionally, enable **Show query limits in debug details** to show each data element's limit consumption and DML and SOQL query activity in the debug details. Data elements include Create Records, Update Records, Get Records, and Delete Records.

To see the debug run's path on the canvas, click **Run**. The debug details show the information that you enabled.
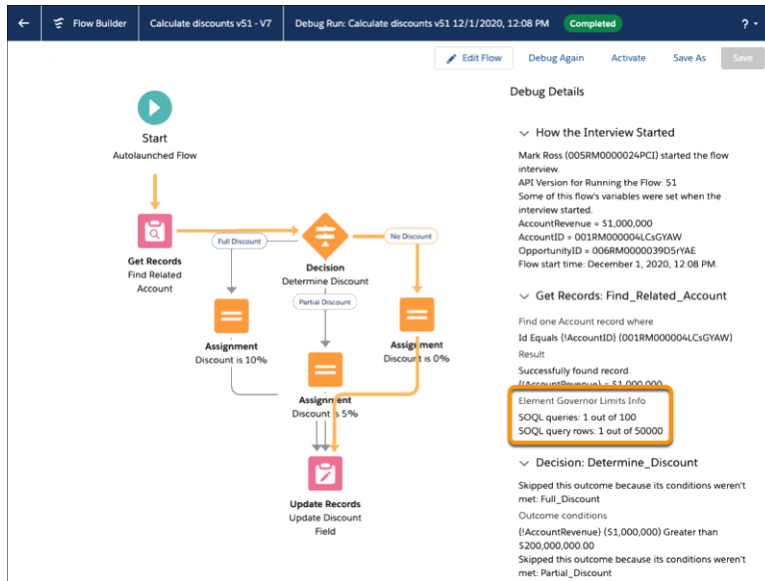
See Accurate Flow Information in Debug Logs

Debug logs now record the total amount of CPU time consumed by a particular flow or process in the FLOW_INTERVIEW_FINISHED_LIMIT_USAGE log lines. Also, the FLOW_INTERVIEW_LIMIT_USAGE log lines now accurately record the CPU time consumed by flows and processes that are configured to run in API version 51.0 or later.

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

How: To see the total CPU time consumed by a specific flow interview, set the debug log levels to track the `Workflow` category at the **FINER** level. This example shows a flow interview that consumed 24 ms of CPU time.

```
17:55:23.4
(54913106)|FLOW_INTERVIEW_FINISHED|3320cb8f84e00adccd6746d958a117644c8b540-65aa|2MyFlow
17:55:23.4 (54975319)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|SOQL queries: 0 out of 100
17:55:23.4 (54989097)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|SOQL query rows: 0 out of 50000
17:55:23.4 (54997299)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|SOSL queries: 0 out of 20
17:55:23.4 (55008221)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|DML statements: 0 out of 150
17:55:23.4 (55021122)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|DML rows: 0 out of 10000
17:55:23.4 (55029753)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|CPU time in ms: 24 out of 15000
17:55:23.4 (55069484)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|Heap size in bytes: 1040 out of
 6000000
17:55:23.4 (55078169)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|Callouts: 0 out of 100
17:55:23.4 (55089761)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|Email invocations: 0 out of 10
17:55:23.4 (55097357)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|Future calls: 0 out of 50
17:55:23.4 (55104650)|FLOW_INTERVIEW_FINISHED_LIMIT_USAGE|Jobs in queue: 0 out of 50
```

SEE ALSO:

See Accurate CPU Time Usage of Flows and Processes

Flow Management

Now you can delete a flow version that was installed from a first-generation managed package—without uninstalling the package.

Delete a Flow Version Installed from a Package Without Uninstalling the Package

In subscriber orgs, you can now delete a flow version that was installed from a first-generation managed package. Previously, to delete a flow version installed from a first-generation managed package, you had to uninstall the package.

Delete a Flow Version Installed from a Package Without Uninstalling the Package

In subscriber orgs, you can now delete a flow version that was installed from a first-generation managed package. Previously, to delete a flow version installed from a first-generation managed package, you had to uninstall the package.

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

Why: Now, a flow version can be deleted if it:

- Is inactive.
- Isn't the latest version of the flow installed in an org.
- Doesn't have any associated paused flow interviews. If a flow version has paused interviews, it can't be deleted until those interviews are finished or deleted.

How: From Setup, in the Flows list view, click the down arrow in the row for a flow that was installed from a first-generation managed package. Select **View Details and Versions**. On the flow's detail page, deactivate the flow version if necessary, and click **Del**.

Flow Extensions

Custom property editors are now generally available for custom invocable actions. Custom property editors can also access automatically stored variables in the flow as component inputs.

Configure Invocable Actions in Flow Builder More Easily with Custom Property Editors (Generally Available)

Developers can create custom property editors that make it a snap for you to configure custom invocable actions in Flow Builder. A custom property editor is simply a Lightning web Component. This feature, now generally available, includes some changes since the beta release. Packaging and change sets are now supported for flows that include custom property editors for invocable actions.

Access More Output Values from Flow Builder Custom Property Editors

You can now use automatically stored values to set inputs and outputs in custom property editors. Previously, you were limited to using values that were manually assigned to flow variables.

Configure Invocable Actions in Flow Builder More Easily with Custom Property Editors (Generally Available)

Developers can create custom property editors that make it a snap for you to configure custom invocable actions in Flow Builder. A custom property editor is simply a Lightning web Component. This feature, now generally available, includes some changes since the beta release. Packaging and change sets are now supported for flows that include custom property editors for invocable actions.

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

Why: Previously, when you configured a custom action, the UI consisted of text boxes and combo boxes. The developer who built the action had no control over the property editor UI.

Now, developers can create a custom action that provides a clean, simple experience for you when you configure it.

SEE ALSO:

[Create Custom Property Editors for Invocable Actions (Generally Available)](#)

Access More Output Values from Flow Builder Custom Property Editors

You can now use automatically stored values to set inputs and outputs in custom property editors. Previously, you were limited to using values that were manually assigned to flow variables.

Where: This change applies to Lightning web components in Lightning Experience.

Why: When you set an input or output such as a combo box or picklist, automatically stored values appear as options. For example, the automatically stored value from a Get Records element appears as an option for this input in the custom action's custom property editor.
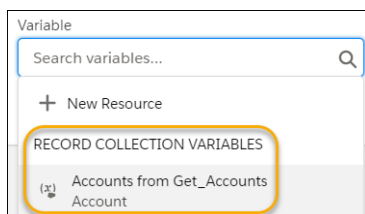
SEE ALSO:

[Create Flow Builder Custom Property Editors That Access Automatic Outputs](#)

Flow and Process Release Updates

CPU time consumption by flows and processes is now accurately measured and enforced. 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. Respect the public access modifiers for legacy Apex actions.

IN THIS SECTION:

Enable Partial Save for Invocable Actions (Update, Enforced)

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. This update, released in Winter '20, was scheduled for enforcement in Summer '20 and first postponed to Winter '21. This update was again postponed to and is enforced in Spring '21.

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

This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record. This update, released in Spring '20, was scheduled for enforcement in Summer '20 and then postponed to Spring '21, but was postponed again to Summer '21. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Summer '21.

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Enforced)

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. This update, released in Spring '20, was scheduled for enforcement in Summer '20, but was postponed to and is enforced in Spring '21.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field. This update, released in Spring '19, was scheduled for enforcement in Spring '21, but was postponed to Spring '22. This update was enabled in Salesforce orgs that received Summer '20 before July 10, 2020. If this is true for your org and you disabled the update, you must enable it in Spring '22. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Spring '22.

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released 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. This update is enforced in Winter '22.

Accurately Measure the CPU Time Consumption of Flows and Processes (Update)

With this update enabled, Salesforce accurately measures, logs, and limits the CPU time consumed by all flows and processes. Previously, the CPU time consumed was occasionally incorrect or misattributed to other automation occurring later in the transaction, such as Apex triggers. Now you can properly identify performance bottlenecks that cause the maximum per-transaction CPU time consumption limit to be exceeded. Also, because CPU time is now accurately counted, flows and processes fail after executing the element, criteria node, or action that pushes a transaction over the CPU limit. We recommend testing all complex flows and processes, which are more likely to exceed this limit.

Analyze Screen Flow Usage (Update)

With this update, you can use reports to examine run-time details about your screen flows. Discover usage patterns and in turn optimize screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows.

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for enforcement in Summer '20 and then postponed to Winter '21, but was 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.

The Disable Rules for Enforcing Explicit Access to Apex Classes update is now scheduled to be enforced in Spring '22. With this update, the running user of a flow or process no longer requires explicit access to Apex classes that are invoked by the flow or process.

Enable Partial Save for Invocable Actions (Update, Enforced)

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. This update, released in Winter '20, was scheduled for enforcement in Summer '20 and first postponed to Winter '21. This update was again postponed to and is enforced in Spring '21.

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

Flow and Process Release Updates

Winter '21 Release Notes: Enable Partial Save for Invocable Actions (Update, Postponed)

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

This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record. This update, released in Spring '20, was scheduled for enforcement in Summer '20 and then postponed to Spring '21, but was postponed again to Summer '21. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Summer '21.

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 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.

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

Flow and Process Release Updates

Winter '21 Release Notes: Enforce Data Access in Flow Merge Fields (Update, Postponed)

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Enforced)

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. This update, released in Spring '20, was scheduled for enforcement in Summer '20, but was postponed to and is enforced in Spring '21.

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.

> **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

Flow and Process Release Updates

Winter '21 Release Notes: Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field. This update, released in Spring '19, was scheduled for enforcement in Spring '21, but was postponed to Spring '22. This update was enabled in Salesforce orgs that received Summer '20 before July 10, 2020. If this is true for your org and you disabled the update, you must enable it in Spring '22. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Spring '22.

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 '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 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 `Release Updates`, 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

 Flow and Process Release Updates

 Winter '21 Release Notes: Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released 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. This update is enforced in Winter '22.

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

Flow and Process Release Updates

Accurately Measure the CPU Time Consumption of Flows and Processes (Update)

With this update enabled, Salesforce accurately measures, logs, and limits the CPU time consumed by all flows and processes. Previously, the CPU time consumed was occasionally incorrect or misattributed to other automation occurring later in the transaction, such as Apex triggers. Now you can properly identify performance bottlenecks that cause the maximum per-transaction CPU time consumption limit to be exceeded. Also, because CPU time is now accurately counted, flows and processes fail after executing the element, criteria node, or action that pushes a transaction over the CPU limit. We recommend testing all complex flows and processes, which are more likely to exceed this limit.

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 Summer '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**. To get the Accurately Measure the CPU Time Consumption of Flows and Processes release update, follow the testing and activation steps.

Flows and processes fail if they cause a transaction to exceed the CPU time limit, and complex flows and processes are more likely to exceed this limit. To decrease the CPU time usage of a flow or process, reduce the number of elements, formulas, and cross-object references. You can check the debug logs to see how much CPU time is taken by each element, criteria node, and action.

SEE ALSO:

Release Updates

Flow and Process Release Updates

Salesforce Help: Per-Transaction Flow Limits (can be outdated or unavailable during release preview)

Analyze Screen Flow Usage (Update)

With this update, you can use reports to examine run-time details about your screen flows. Discover usage patterns and in turn optimize screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows.

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 Spring '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: With this update, run-time details from screen flows are saved in Flow Interview Logs and Flow Interview Log Entries records. You can quickly start analyzing that data by running the Sample Flow Report: Screen Flows report.

You can also create custom reports using the Screen Flows custom report type. Or you can create a custom report type using the Flow Interview Logs and Flow Interview Log Entries objects. Users then can create custom reports using the custom report type.

How: To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**. To get the Analyze Screen Flow Usage release update, follow the testing and activation steps.

As users run and navigate through screen flows, their usage data is collected and becomes available in the Sample Flow Report: Screen Flows report. Run the report and confirm that it contains data from your screen flows.

SEE ALSO:

Release Updates

Flow and Process Release Updates

Summer '20 Release Notes: Analyze Screen Flow Usage

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for enforcement in Summer '20 and then postponed to Winter '21, but was 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

Flow and Process Release Updates

Winter '21 Release Notes: Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Disable Rules for Enforcing Explicit Access to Apex Classes update is now scheduled to be enforced in Spring '22. With this update, the running user of a flow or process no longer requires explicit access to Apex classes that are invoked by the flow or process.

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

When: Originally released in Summer '20, this release update was postponed twice and is now scheduled to be enforced in Spring '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 is only available for Salesforce orgs that enabled the Require User Access to Apex Classes Invoked by Flow update.

If the Require User Access to Apex Classes Invoked by Flow update was enabled, this Disable Rules for Enforcing Explicit Access to Apex Classes update returns your org to its original and preferred state. In that state, user access to Apex classes is no longer required for flows built in Flow Builder and processes built in Process Builder to invoke Apex. When users can run a flow or process, they implicitly have access to its Apex actions.

Note:
- Neither release update affects legacy Apex actions (Apex plug-ins) in flows, whose user access was never restricted.

- If your flows or processes start to fail in Spring '21 when they invoke Apex, we recommend that you enable this update as soon as possible. Doing so can fix those errors, which typically display this message: "An unhandled fault has occurred in the flow." For details, see this Known Issue: Restricted Access Causing Flows to Fail in Spring '21.

How: If you have a flow or process that invokes Apex, we strongly recommend that you take these preparation steps.

- If you granted users access to Apex classes via profiles or permission sets, we recommend that you apply the principle of least privilege by revoking that access. But first confirm that the users don't require access to those Apex classes for reasons other than running flows and processes.

- Consider overriding the default user access for your flows. By default, users can run a flow if they have the Flow User feature license, the Run Flows permission, or the Manage Flow permission. For each flow, we recommend that you override that default behavior and restrict access to enabled profiles or permission sets.

  For example, to prevent unauthenticated guest users in Experience Cloud sites from running a flow, restrict the flow's user access to enabled profiles or permission sets. Then grant access to the appropriate users by enabling the specific profiles or permission sets.

> 📝 Note: For detailed instructions for the preparation steps, see this Knowledge Article: Prepare for the "Disable Rules for Enforcing Explicit Access to Apex Classes" Release Update.

The preparation steps are recommended as security best practices. But they're not required, and enabling the Disable Rules for Enforcing Explicit Access to Apex Classes update doesn't impact existing implementations. For example, users' permission sets and profiles can continue to grant them explicit access to Apex classes.

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, follow the testing and activation steps.

SEE ALSO:

Release Updates

Flow and Process Release Updates

Summer '20 Release Notes: Require User Access to Apex Classes Invoked by Flow (Update, Retired)

Winter '21 Release Notes: Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

Salesforce Help: How Does Flow Security Work?

Flow and Process Run-Time Improvements in API Version 51.0

These updates affect only flows and processes that are configured to run on API version 51.0 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.

Treat invalid conditions and condition logic as errors instead of false values

An invalid reference in a condition or invalid condition logic now results in an error at run time. For flows and processes that run in API versions earlier than 51.0, invalid conditions and condition logic evaluate to false.

For example, suppose that a flow's Decision element contains this condition, which references a variable that doesn't exist in the flow: `{!VariableNotInFlow} LESS THAN 100`. If the flow runs in API version 51.0 or later, an error occurs when the Decision element is executed. If the flow runs in an API version earlier than 51.0, the condition evaluates to false, meaning that VariableNotInFlow isn't considered to be less than 100.

Processes contain conditions and condition logic in the criteria for each action group. Many flow elements can have conditions, including Start, Decision, Pause, and elements that access Salesforce records.

Avoid unexpected fault path executions for bulkified flow elements

During the bulk execution of a Create Records, Update Records, or Delete Records element, only the failed interviews take the fault path. For flows that run in API versions earlier than 51.0, if even only one interview takes the fault path, all interviews in the batch take the fault path.

Accurately Measure the CPU Time Consumption of Flows and Processes

This versioned update enables the Accurately Measure the CPU Time Consumption of Flows and Processes release update for flows that run in API version 51.0. After the release update's auto-activation, the update is enforced for all flows regardless of their run-time API version.

Run actions in flows without hitting callout errors

After a flow executes a callout, any subsequent callouts made in the same transaction cause the flow to fail, resulting in an error with the affected callout.

To address this error:

- Set the API version of your flow to v51.0 without changing the action's transaction control.
- Update each action to let the flow decide how to manage transactions.

SEE ALSO:

Salesforce Help: Define Conditions in a Flow

Salesforce Help: Add Process Criteria

Salesforce Help: Flow Bulkification in Transactions

Salesforce Help: Customize What Happens When a Flow Fails

See Accurate CPU Time Usage of Flows and Processes

Avoid Callout Errors in Screen Flows Automatically

Einstein Builders

Einstein Recommendation Builder is generally available and checks your data as you go. Build predictions for managed packages with Einstein Prediction Builder.

IN THIS SECTION:

Validate Your Recommendations with Data Checker (Generally Available)

Build AI recommendations with confidence. Data Checker validates your data as you build, and alerts you when you don't have sufficient data so you can adjust your settings and avoid errors.

Enjoy Easier Access to Your Recommendations (Generally Available)

Einstein Recommendation Builder makes it easier to build and access your recommendations with a new tile in Setup.

Build Predictions for Managed Packages

Predictions built in Einstein Prediction Builder can now be included in a managed package.

Retry Building a Failed Prediction

Before you let a failed prediction ruin your day, try building it again with the Retry action in Einstein Prediction Builder.

Validate Your Recommendations with Data Checker (Generally Available)

Build AI recommendations with confidence. Data Checker validates your data as you build, and alerts you when you don't have sufficient data so you can adjust your settings and avoid errors.

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

Who: This feature is available with the Service Cloud Einstein and Lightning Platform Plus licenses.

Why: As you build your recommendation, view Data Checker at the top of the Settings page to make sure you have enough records to build your recommendation.
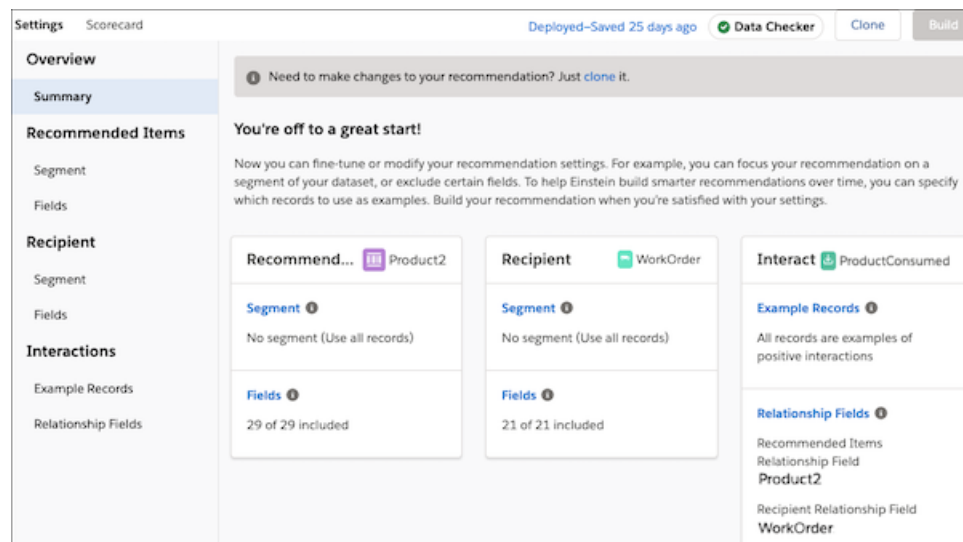
Data Checker gives you feedback on your data as you build your recommendation. Let's say you're recommending Spare Parts, a Recommended Items object, to Work Orders, a Recipient object. You use Products Consumed, an Interactions object, to indicate parts used for similar work orders in the past so that Einstein can recommend relevant parts for new work orders. Define segments to focus on types of work orders or parts to recommend. Data Checker works as you build to look at the data on all three objects and alerts you when you don't have enough records to build a recommendation.

As you build, Data Checker gives you feedback about your recommendation data.

A check mark indicates that the recommendation has enough data to build successfully.

A question mark means that Data Checker was unable to get an accurate record count on every object but you can still build your recommendation.

A warning sign appears when you don't have enough records to build your recommendation with current settings. Or when the same records are used in your positive and negative interactions.

Enjoy Easier Access to Your Recommendations (Generally Available)

Einstein Recommendation Builder makes it easier to build and access your recommendations with a new tile in Setup.

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

Who: This feature is available with the Service Cloud Einstein and Lightning Platform Plus licenses.

How: From Setup, access Einstein Recommendation Builder in a tile at the top of the page.
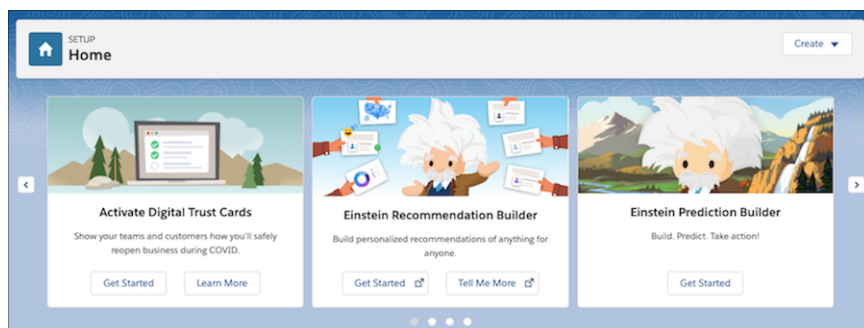
Build Predictions for Managed Packages

Predictions built in Einstein Prediction Builder can now be included in a managed package.

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, EinsteinBuilderFree, or Platform Plus license.

How: After installing your managed package, go to your list of predictions in Einstein Prediction Builder in Setup. Managed package predictions are identified with a special icon. Hover on the icon to see the name of the package. The status is Ready to Build until you build it. From the action menu, build it. When it's ready, you have the opportunity to review the scorecard and enable the prediction.
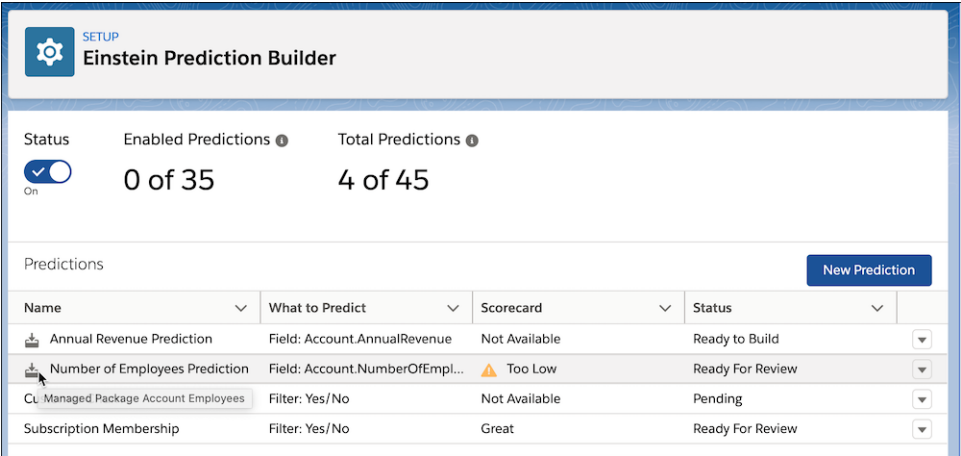
Retry Building a Failed Prediction

Before you let a failed prediction ruin your day, try building it again with the Retry action in Einstein Prediction Builder.

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, EinsteinBuilderFree, or Platform Plus license.

How: In the Predictions list view on the Einstein Prediction Builder setup page, use Retry on the action menu for any prediction that has a Model Failed status. Within 24 hours, you receive a notification about whether it was successful or not.

Lightning App Builder

Create localized tab, attribute, and component labels on your Lightning pages with Localization Support in App Builder. Add flexibility and control to actions on your record pages with Dynamic Actions, now generally available for select standard objects on desktop and for custom objects on mobile. The Performance Analysis tool now gives you more detailed information about your Lightning record page performance on both desktop and phone.

IN THIS SECTION:

[Define Localized Component Labels and Attribute Values on Lightning Pages Using Custom Labels](#)
With Localization Support in App Builder, when you specify a custom label in the Lightning App Builder, you can use `{!$Label.customLabelName}` to help define the label's value.

More Support for Dynamic Actions

Dynamic actions let you add flexibility and control to actions on your record pages. Dynamic actions for custom objects are now GA for mobile, and have been GA for desktop since Winter '21. Dynamic actions for Account, Case, Contact, Lead, and Opportunity are now GA for desktop. Dynamic actions for all other 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 Performance For Lightning Pages Viewed on a Phone

Performance Analysis in App Builder now assesses record page performance for the phone form factor. New tabs in the Page Analysis window give you separate results for a Lightning record page when it loads on a desktop and on a phone so you can design your page for optimal performance on both.

Get More Detailed Information About Your Lightning Page Performance on Desktop

Get better info on page load time and page behavior predictions at a glance. Updates to the Lightning page analysis tool in the Lightning App Builder give you more accurate performance predictions for your Lightning page.

Get Tips for Phone-Enabled Lightning Pages in Guidance for App Builder

Guidance for App Builder just got better. Now when you design your Lightning record pages, you see specialized tips for the phone form factor that help you optimize your user's experience when viewing Lightning pages from their phone.

Collapse and Expand Field Sections on Dynamic Forms-Enabled Pages

To make designing and viewing Dynamic Forms-enabled pages more efficient, you can now expand and collapse field sections in the Lightning App Builder and when you view the pages in runtime.

Define Localized Component Labels and Attribute Values on Lightning Pages Using Custom Labels

With Localization Support in App Builder, when you specify a custom label in the Lightning App Builder, you can use `{!$Label.customLabelName}` to help define the label's value.

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

Why: On a Lightning page, custom Tabs component and other component attribute values aren't localized when they're entered as plain text in the Lightning App Builder. For example, if you have an org whose default language is English and your Lightning page has a Tabs component with three custom tabs that you named Cars, Trucks, and Planes, the non-English users in your org see those plain text tab label values as Cars, Trucks, and Planes when they view the page. The tab label values aren't translated into your users' languages.

However, configuring custom label values in the Lightning App Builder using the `{!$Label.customLabelName}` expression lets users see labels in their chosen language, if you created a translation for that label in their language.
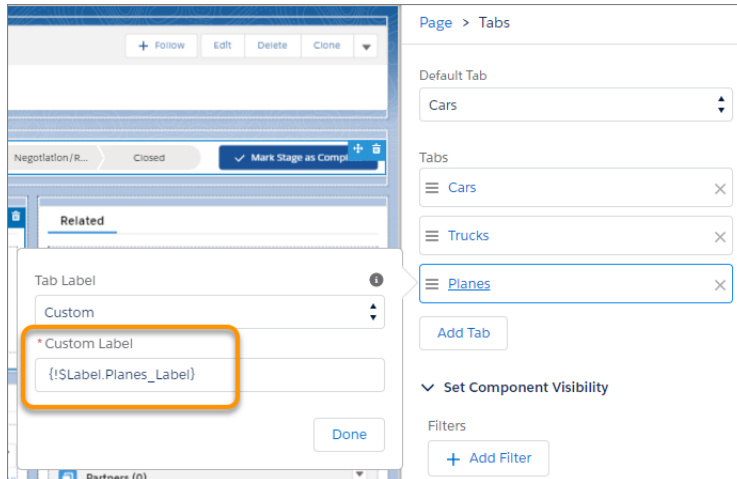
The `{!$Label.`*`customLabelName`*`}` expression works with every custom label you create in Setup using the custom label feature. The text you define in the Value field for your custom label appears as the label value when the component renders on a Lightning page. And, if you create a translated value for the label, users using that language in your org see the translated value.

The `{!$Label.`*`customLabelName`*`}` expression isn't limited to use for component or tab labels. You can also use it to provide a translated value for any component attribute of type string or rich text.

SEE ALSO:

> *Salesforce Help*: Build Localized Component Labels and Attribute Values on Lightning Pages Using Custom Labels (can be outdated or unavailable during release preview)

More Support for Dynamic Actions

Dynamic actions let you add flexibility and control to actions on your record pages. Dynamic actions for custom objects are now GA for mobile, and have been GA for desktop since Winter '21. Dynamic actions for Account, Case, Contact, Lead, and Opportunity are now GA for desktop. Dynamic actions for all other 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 a beta feature, Dynamic Actions for standard objects on desktop 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 the feature at any time. This feature is for evaluation purposes only, not for production use. This feature is 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 Dynamic Actions in the Dynamic Forms & Actions group in the Trailblazer Community.

How: To enable dynamic actions for a custom object on desktop and mobile, add or select the Highlights Panel component on the 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.
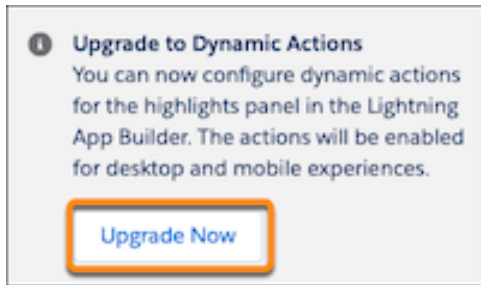
To enable dynamic actions for an Account, Case, Contact, Lead, or Opportunity on desktop, add or select the Highlights Panel component on the object's record page. In the Highlights Panel properties pane, click **Upgrade Now** and step through the migration assistant to migrate actions or start with new ones.
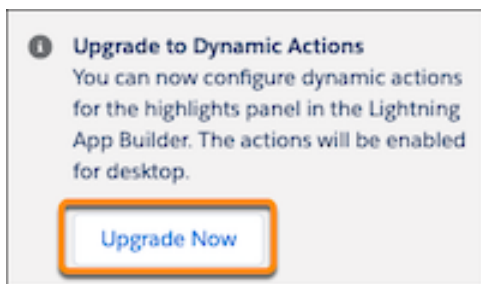
To enable dynamic actions for all other standard objects on desktop (beta), add or select the Highlights Panel component on the object's record page. In the Highlights Panel properties pane, click **Upgrade Now** and step through the migration assistant to migrate actions or start with new ones.
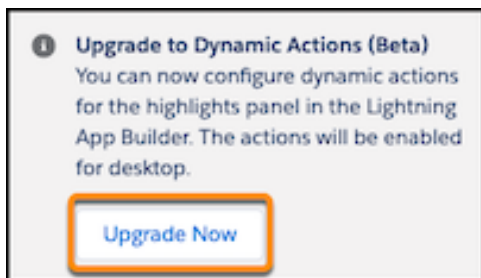
If you want to use a different set of dynamic actions for a custom object on mobile than on desktop, or if you have a mobile-only Lightning page, you can enable dynamic actions for mobile via the Page properties on the record page. Create or open a record page for a custom object in the Lightning App Builder. In the Page properties pane, select **Enable page-level dynamic actions for the Salesforce mobile app**.

To add an action in any of the dynamic actions 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 👁 (3) next to 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.
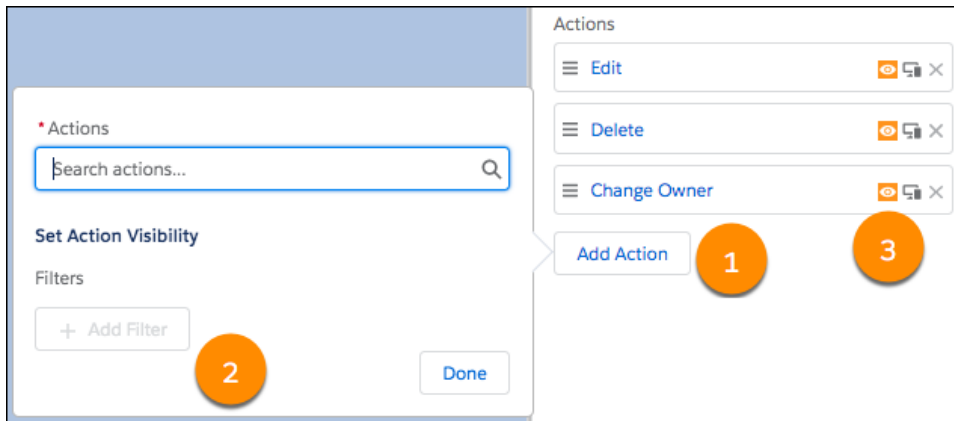
Analyze Performance For Lightning Pages Viewed on a Phone

Performance Analysis in App Builder now assesses record page performance for the phone form factor. New tabs in the Page Analysis window give you separate results for a Lightning record page when it loads on a desktop and on a phone so you can design your page for optimal performance on both.

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

How: To view the assessment of your record page's performance, click **Analyze** from the Lightning App Builder toolbar.
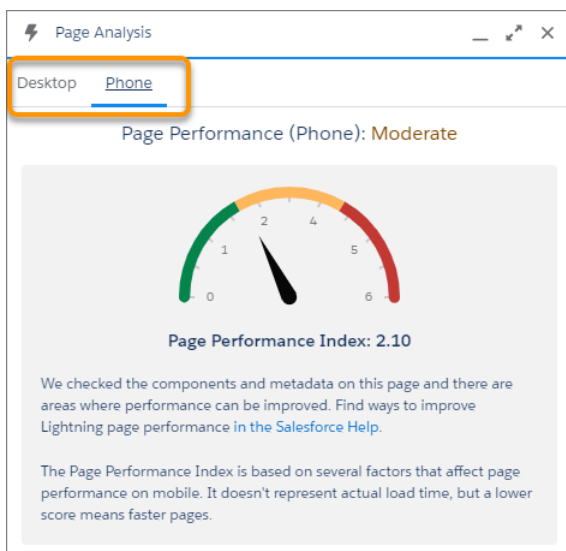
Analysis of page performance on phone is only available on pages whose template supports the phone form factor.

Get More Detailed Information About Your Lightning Page Performance on Desktop

Get better info on page load time and page behavior predictions at a glance. Updates to the Lightning page analysis tool in the Lightning App Builder give you more accurate performance predictions for your Lightning page.

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

How: A new speedometer-style chart in the main desktop performance analysis card shows your page's predicted Experienced Page Time (EPT), or page load time (1). And because some components impact page performance more than others, the added component performance breakdown card shows you which standard components on the page contribute the most to the predicted EPT (2).
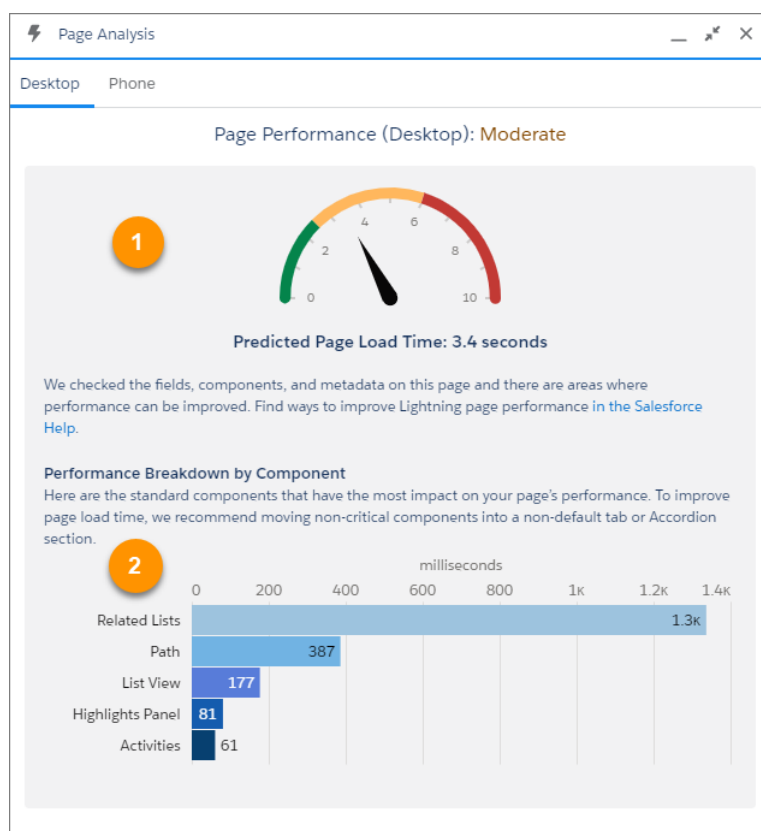
We also improved and expanded the scope of our analysis model. The algorithms that assess a page are smarter, and they now analyze more than 10 times the performance factors as before.

To view the assessment of your record page's performance, click **Analyze** from the Lightning App Builder toolbar.

Get Tips for Phone-Enabled Lightning Pages in Guidance for App Builder

Guidance for App Builder just got better. Now when you design your Lightning record pages, you see specialized tips for the phone form factor that help you optimize your user's experience when viewing Lightning pages from their phone.

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

How: Phone form factor-related tips are available on Lightning record pages whose template supports the phone form factor.

SEE ALSO:

Salesforce Help: Guidance for App Builder (can be outdated or unavailable during release preview)

Collapse and Expand Field Sections on Dynamic Forms-Enabled Pages

To make designing and viewing Dynamic Forms-enabled pages more efficient, you can now expand and collapse field sections in the Lightning App Builder and when you view the pages in runtime.

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

How: Expanding or collapsing a field section while designing the page has no effect on whether a section is expanded or collapsed for users during runtime. Users can expand or collapse field sections only while in view or inline edit mode, not in the full edit, create, or clone windows.

Globalization

The offshore Chinese yuan and Amharic language are now available, users can read Hebrew right to left in more clouds, and you can enable new locale formats via a release update.

IN THIS SECTION:

Differentiate Between the Onshore and Offshore Yuan

The offshore Chinese yuan (CNH) is now available in Salesforce, so that you can distinguish between China's onshore and offshore currencies. In mainland (onshore) China, commerce is conducted in the Chinese yuan referred to as CNY. Outside mainland China (offshore), commerce is conducted in the Chinese yuan referred to as CNH. Currency features and rates differ between the two.

Read Hebrew Right to Left in More Clouds

To help your users who read Hebrew feel more at home, the right-to-left (RTL) layout is available for Hebrew in three more clouds: Financial Services Cloud (previously in beta), Consumer Goods Cloud, and Health Services Cloud. Users with Hebrew as their personal language see the RTL language layout by default in Lightning Experience.

Connect with Customers Who Speak and Read Amharic

Amharic is now available as a platform-only language, and users can select the new Amharic (Ethiopia) locale.

Enable ICU Locale Formats (Previously Released Update)

To do business wherever you are, adopt 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.

Differentiate Between the Onshore and Offshore Yuan

The offshore Chinese yuan (CNH) is now available in Salesforce, so that you can distinguish between China's onshore and offshore currencies. In mainland (onshore) China, commerce is conducted in the Chinese yuan referred to as CNY. Outside mainland China (offshore), commerce is conducted in the Chinese yuan referred to as CNH. Currency features and rates differ between the two.

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

How: In a single-currency org, you can set your org's default currency from the Company Information Setup page.

If multiple currencies are enabled in your org, you must activate this currency to use it. From the Manage Currencies Setup page, add CNH - Chinese Yuan (Offshore) to your active currencies. Then you can then select CNH as your corporate currency, and users can select it as their personal currency.

SEE ALSO:

Salesforce Help: Manage Multiple Currencies (can be outdated or unavailable during release preview)

Salesforce Help: Set Your Personal or Organization-Wide Currency (can be outdated or unavailable during release preview)

Read Hebrew Right to Left in More Clouds

To help your users who read Hebrew feel more at home, the right-to-left (RTL) layout is available for Hebrew in three more clouds: Financial Services Cloud (previously in beta), Consumer Goods Cloud, and Health Services Cloud. Users with Hebrew as their personal language see the RTL language layout by default in Lightning Experience.

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

SEE ALSO:

Salesforce Help: Right-to-Left (RTL) Language Support (can be outdated or unavailable during release preview)

Connect with Customers Who Speak and Read Amharic

Amharic is now available as a platform-only language, and users can select the new Amharic (Ethiopia) locale.

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

Why: The Amharic (Ethiopia) locale uses these formats for International Components for Unicode (ICU) and Oracle's Java 8 Development Kit (JDK8).

> Note: We recommend viewing this information in Connect with Customers Who Speak and Read Amharic in Salesforce Help. Not all characters appear correctly in PDFs.

FORMAT TYPE	FORMAT
Default Currency	Ethiopian Birr: ETB
Date Time: Short	28/01/2008 4:30
Date Time: Medium	28 2008 4:30:05
Date Time: Long	28/01/2008 4:30:05 -8
Date: Short	28/01/2008
Date: Medium	28 2008

FORMAT TYPE	FORMAT
Date: Long	28 2008
Time	4:30
Number: Positive	1,234,567.567
Number: Negative	-1,234,567.567
Currency: Positive	1,234,567.57
Currency: Negative	- 1,234,567.57
Accounting Currency: Positive	1,234,567.57
Accounting Currency: Negative	(1,234,567.57)
Name	Ms. FName LName
Address	Address Line 1,
	Address Line 2
	ZipCode City
	State Country

SEE ALSO:

Salesforce Help: Supported Languages (can be outdated or unavailable during release preview)

Salesforce Help: Locales Overview (can be outdated or unavailable during release preview)

Enable ICU Locale Formats (Previously Released Update)

To do business wherever you are, adopt 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. When this release update is enabled, the ICU formats are available in API version 45.0 and later.

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
```

For recommended areas of testing and details on the changes for each locale, see Go Global with New International Locale Formats in Salesforce Help.

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 `User Interface`, then select **User Interface**. Select **Enable ICU formats for en_CA locale** and save your changes.

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

External Services

With External Services, you can connect to a service of your choice, invoke methods based on the external source via a flow, and import data from the service into Salesforce.

IN THIS SECTION:

Legacy External Services Version Is Being Retired

Legacy External Services is scheduled for retirement in Summer '21. Retiring all legacy registrations now ensures that all your registrations can benefit from current and future product enhancements and features. As part of the effort to move to a single version support model, changes in this release include end of support for the behavior and functionality of Actions created via legacy registrations, package workflows that contain legacy registrations, and any resulting issues.

Include Top-Level Named Array Definition for List Types in Your External Services Schemas

You can include top-level named array definitions for list types that extend support for additional OpenAPI 2.0 schemas.

Legacy External Services Version Is Being Retired

Legacy External Services is scheduled for retirement in Summer '21. Retiring all legacy registrations now ensures that all your registrations can benefit from current and future product enhancements and features. As part of the effort to move to a single version support model, changes in this release include end of support for the behavior and functionality of Actions created via legacy registrations, package workflows that contain legacy registrations, and any resulting issues.

Where: This change applies to orgs with the Legacy External Services version in Lightning Experience, Enterprise, Performance, Unlimited, and Developer Editions. As of Spring '21, Salesforce no longer supports legacy external services registrations.

When:

- As of Winter '21, Salesforce no longer allows the creation of, nor supports existing legacy External Service registrations. You can't edit legacy External registrations in OpenAPI format.

- As of Spring '21, Salesforce doesn't support any cases for legacy External Services, including legacy schemas and registrations. For example, Salesforce no longer supports legacy package workflow and any resulting issues. If you haven't already transitioned your registrations to the current External Services version, then end-of-life your legacy packages and transition to the current External Services managed package as soon as possible. If you wait beyond the Spring '21 window to transition a legacy registration to the new version, callouts to the external service will no longer work.

- As of Summer '21, you can't do anything with your legacy External Services registrations. You won't be able to edit them, recreate them, or use legacy registrations in a flow. We recommend transitioning to the current External Services version as soon as possible, if you haven't already done so.

To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: 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. To learn how, see Edit, Delete, Save As, and View an External Service. 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. Instructions for identifying and recreating Legacy External Services registrations can be found in our Help documentation.

SEE ALSO:

    Salesforce Help: External Services Versions: Legacy and Current (can be outdated or unavailable during release preview)

    Salesforce Help: Edit, Delete, Save As, and View an External Service (can be outdated or unavailable during release preview)

Include Top-Level Named Array Definition for List Types in Your External Services Schemas

You can include top-level named array definitions for list types that extend support for additional OpenAPI 2.0 schemas.

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

When: To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: You can create a top-level named array and nest named and anonymous arrays underneath it. This new support impacts response and request body definitions in your schema.

For example, this top-level array definition is now supported. Previously, it was unsupported.

```
{
    "swagger": "2.0",
    ...
        "schema": {
            "$ref": "#definitions/MyObjectList"
        }
        ...
    "definitions": {
        "MyObjectList": {
            "type": "array",
            "items": {
                "type": "object",
                "properties": {...}
            }
        }
    }
}
```

For examples of valid External Services array definitions in Open API 2.0, consult Salesforce Help documentation.

SEE ALSO:

    Salesforce Help: External Services Considerations (can be outdated or unavailable during release preview)

Salesforce Connect

Add more Salesforce Connect licenses to your scratch orgs. For enhanced security, you're required to reauthenticate when you make certain changes to an existing named credential or external data source.

IN THIS SECTION:

[Configure Multiple Salesforce Connect Licenses in a Scratch Org](#)

With the updated `PlatformConnect` scratch org feature, you can configure up to five Salesforce Connect licenses in a scratch org. Previously, you configured only one.

[Reauthenticate After Editing Certain Fields of a Named Credential or External Data Source](#)

If you edit certain fields of an existing named credential or external data source whose identity type is named principal, you're now required to reauthenticate against the endpoint. This change enhances the security of your Salesforce Connect environment.

Configure Multiple Salesforce Connect Licenses in a Scratch Org

With the updated `PlatformConnect` scratch org feature, you can configure up to five Salesforce Connect licenses in a scratch org. Previously, you configured only one.

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

How: This scratch org definition file snippet shows how to configure three licenses:

```
"features": ["PlatformConnect:3"],
```

SEE ALSO:

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

Salesforce DX Developer Guide: Scratch Org Features

Reauthenticate After Editing Certain Fields of a Named Credential or External Data Source

If you edit certain fields of an existing named credential or external data source whose identity type is named principal, you're now required to reauthenticate against the endpoint. This change enhances the security of your Salesforce Connect environment.

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

How: You're required to reauthenticate against the endpoint when you edit these fields:

- URL: Named credential and external data source
- Authentication Provider: Named credential and external data source
- Outbound Network Connection: Named credential only

Reauthentication is required only for named credentials or external data sources that use the OAuth or password authentication protocols. Remember to check **Start Authentication Flow on Save** when using OAuth authentication to ensure that the reauthentication occurs.

If you use the Metadata API to edit these fields, we recommend that you use Setup to reauthenticate.

SEE ALSO:

> *Salesforce Help:* Named Credentials (can be outdated or unavailable during release preview)
>
> *Salesforce Help:* Access External Data With Salesforce Connect (can be outdated or unavailable during release preview)

Fields

Improve performance with new limits on picklist values. Use more characters in field-level help text. Enable rendering of HTML tags in custom field labels as plain text.

IN THIS SECTION:

Improve Performance with Limits on Inactive Picklist Values

Enforcing limits on inactive values for unrestricted picklists can improve performance and improve your Salesforce org's overall health. If your org's inactive unrestricted picklist values go unchecked, performance degrades. The point when degradation occurs depends on your implementation.

Get More Characters for Field-Level Help Text

Customers can view the field-level help text by hovering over the Info icon. And with the character limit expanded from 255 to 510, you can now provide more detailed help information. This increase applies to standard and custom fields on detail and edit pages.

Disable Rendering of HTML in Custom Fields Labels (Update, Enforced)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When this update is enabled, HTML tags in custom field labels are rendered as plain text.

Improve Performance with Limits on Inactive Picklist Values

Enforcing limits on inactive values for unrestricted picklists can improve performance and improve your Salesforce org's overall health. If your org's inactive unrestricted picklist values go unchecked, performance degrades. The point when degradation occurs depends on your implementation.

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

Why: The default enforcement of this limit protects you from the unintended creation of numerous inactive picklist values, such as imported text field data that is erroneously converted to picklist fields. Disabling the limit is recommended for troubleshooting purposes, such as when errors occur during data creation or metadata deployment.

How: The following rules apply when limits are enforced.

- The limit for inactive values on unrestricted picklists is 4,000.
- The limit applies inactive values on newly created unrestricted picklists.
- Current unrestricted picklists in your org aren't affected by the new limit.
- Standard picklist fields aren't affected by this change.
- Admins can choose to exclude their Salesforce org from inactive value limits.
- The limit doesn't apply to restricted picklist and global picklist value sets. Global picklist value sets have a combined active and inactive limit of 1,000.

Limits are enforced by default. To allow unlimited inactive values on unrestricted picklists, from Setup, enter `Picklist Settings` in the Quick Find Box, then click **Enable unlimited inactive values on unrestricted picklists**.

SEE ALSO:

    Salesforce Help: Manage Inactive Picklist Values

Get More Characters for Field-Level Help Text

Customers can view the field-level help text by hovering over the Info icon. And with the character limit expanded from 255 to 510, you can now provide more detailed help information. This increase applies to standard and custom fields on detail and edit pages.

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

SEE ALSO:

    Salesforce Help: Define Field-Level Help

Disable Rendering of HTML in Custom Fields Labels (Update, Enforced)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When this update is 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: If your org is affected by this update, we recommend that you enable it 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. If 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.

Profiles and Permissions

We made changes to the Read Only profile that you'll want to know about. And, we now have integration permission sets.

IN THIS SECTION:

Convert the Read Only Standard Profile to a Custom Profile (Update)

This update converts the Read Only standard profile to a custom profile. After the update is enforced, you can edit permissions in this profile as your business needs require.

The Read Only Profile Is No Longer Available in New Salesforce Orgs

Salesforce orgs created in Spring '21 and later don't have the Read Only standard profile. If you want to assign users read-only permissions, we recommend that you start with the Minimum Access standard profile as a least-privilege profile base. Then you can assign custom permission sets to grant users the read access required for your business needs.

Use Integration Permission Sets to Exchange Data with Integration Partners

Integration permission sets define the scope of data access by Salesforce integration-related features and services. Depending on the integration features, Salesforce can predefine the integration permission sets so that they aren't editable in your Salesforce org. Or, an integration permission set can have no initial permissions so that you have full control for your org. An integration permission set can also come with on-premises permissions that you can modify for your org.

Convert the Read Only Standard Profile to a Custom Profile (Update)

This update converts the Read Only standard profile to a custom profile. After the update is enforced, you can edit permissions in this profile as your business needs require.

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

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.

New Salesforce orgs created in Spring '21 and later don't have the Read Only profile.

Why: The Read Only standard profile allowed assigned users to view the Salesforce org's setup, run and export reports, and to view, but not edit, other records. As Salesforce products and offerings expanded, permissions that grant implicit or explicit edit access were added to this profile to allow Salesforce features to function.

To let you customize the Read Only profile to fit your org's risk tolerance and definition of read only, this update converts the Read Only standard profile to a custom profile. You can edit the Read Only custom profile to remove or add permissions as your business needs require. You can also rename the profile, for example, to reflect what it permits or who it's assigned to.

How: Before this update is enforced, review the permissions included in the Read Only profile. Evaluate whether you want the users assigned to the Read Only profile to continue to have the included permissions. You can see a full list of included permissions in the knowledge article, Read Only Profile Conversion to Custom Profile.

After you review the permissions, decide whether to reassign your users to a new profile or to use the existing Read Only profile without reassigning your users. If you continue to use the existing Read Only profile, update your org's custom code that references the Read Only standard profile to make sure that your configurations and deployments remain intact when the Read Only profile is converted.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, then select **Release Updates**. For Convert the Read Only Standard Profile to a Custom Profile, follow the testing and activation steps.

SEE ALSO:

    Knowledge Article: Read Only Profile Conversion to Custom Profile

    Release Updates

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

    The Read Only Profile Is No Longer Available in New Salesforce Orgs

The Read Only Profile Is No Longer Available in New Salesforce Orgs

Salesforce orgs created in Spring '21 and later don't have the Read Only standard profile. If you want to assign users read-only permissions, we recommend that you start with the Minimum Access standard profile as a least-privilege profile base. Then you can assign custom permission sets to grant users the read access required for your business needs.

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

SEE ALSO:

    Summer '20 Release Notes: Use the New Minimum Access User Profile

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

    Convert the Read Only Standard Profile to a Custom Profile (Update)

Use Integration Permission Sets to Exchange Data with Integration Partners

Integration permission sets define the scope of data access by Salesforce integration-related features and services. Depending on the integration features, Salesforce can predefine the integration permission sets so that they aren't editable in your Salesforce org. Or, an integration permission set can have no initial permissions so that you have full control for your org. An integration permission set can also come with on-premises permissions that you can modify for your org.

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

Who: Users of integration-related features. Users also require the Cloud Integration user license.

How: Follow the instructions for the integration feature that you're using.

SEE ALSO:

    Salesforce Help: Customer 360 Data Manager Release Notes

Sharing

Grant access to records with manual sharing in Lightning Experience and create more roles in your Salesforce org.

IN THIS SECTION:

Share Records with Manual Sharing

With manual sharing in Lightning Experience, you now can share records and manage record shares in a new streamlined interface. Previously, you switched to Salesforce Classic to give specific users and user groups access to records.

In Salesforce orgs created in Spring '21 or later, you can create up to 5,000 roles. In existing orgs, the default limit hasn't changed. You can create up to 500 roles and can contact Salesforce Customer Support to increase this limit. Keep in mind that to improve performance, it's best to set up roles based on data access and eliminate any roles that aren't needed.

Share Records with Manual Sharing

With manual sharing in Lightning Experience, you now can share records and manage record shares in a new streamlined interface. Previously, you switched to Salesforce Classic to give specific users and user groups access to records.

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

When: This functionality is available on a rolling basis starting in the Spring '21 release and is available to all customers by February 27, 2021.

Why: Click **Sharing** on the record that you want to share. In the Share window, you can manage who the record is shared with and share any associated records. Manual shares are available only for accounts, opportunities, cases, contacts, leads, and custom objects.

Note:

- Experience Cloud sites and the Salesforce mobile app don't support manual sharing in Lightning.
- Apex managed shares aren't editable.
- Admins can't modify the share access of record owners.

SEE ALSO:

Salesforce Help: Grant Access to Records with Manual Sharing in Lightning Experience (can be outdated or unavailable during release preview)

Create More Roles

In Salesforce orgs created in Spring '21 or later, you can create up to 5,000 roles. In existing orgs, the default limit hasn't changed. You can create up to 500 roles and can contact Salesforce Customer Support to increase this limit. Keep in mind that to improve performance, it's best to set up roles based on data access and eliminate any roles that aren't needed.

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

SEE ALSO:

Salesforce Help: Guidelines for Success with Roles (can be outdated or unavailable during release preview)

Custom Metadata Types

Use the System Overview page to view the total number of custom metadata types in your Salesforce org. Use static Apex methods to access records. Preview Apex dynamic triggers.

IN THIS SECTION:

[View Custom Metadata Type Limits from the System Overview Page](#)

To help you keep a close eye on custom metadata type limits, the System Overview page now lists public and protected types from packages and types included in Salesforce subscriber orgs.

[Access Custom Metadata Type Records Using Static Methods](#)

Use the Apex `getAll()`, `getInstance(recordId)`, `getInstance(qualifiedApiName),` and `getInstance(developerName)` methods to retrieve information from custom metadata type records faster. These methods don't rely on the SOQL engine and return the sObject details directly from the call.

View Custom Metadata Type Limits from the System Overview Page

To help you keep a close eye on custom metadata type limits, the System Overview page now lists public and protected types from packages and types included in Salesforce subscriber orgs.

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

How: The visibility of a custom metadata type is controlled by setting the type to public or protected. For example, protected types aren't visible from the Custom Metadata Types page in a Salesforce subscriber org. Using the System Overview page, you can now track the total number of custom metadata types in your Salesforce org regardless of the visibility settings.

CUSTOM METADATA TYPES [i]
30 (includes 10 Custom Metadata Types from packages)   **15%** *(maximum 200)*
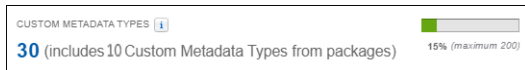
> 📝 **Note:** Custom metadata types that are included in trial packages aren't subject to the limits and are omitted from the Systems Overview page.

SEE ALSO:

Salesforce Help: [Custom Metadata Relationships](#)

Access Custom Metadata Type Records Using Static Methods

Use the Apex `getAll()`, `getInstance(recordId)`, `getInstance(qualifiedApiName),` and `getInstance(developerName)` methods to retrieve information from custom metadata type records faster. These methods don't rely on the SOQL engine and return the sObject details directly from the call.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

Why: The following example uses the `getAll()` method. The custom metadata type named `Games` has a field called `GameType`. This example determines if the field value of the first record is equal to the string `PC`.

```
List<Games__mdt> mcs = Games__mdt.getall().values();
boolean textField = null;
if (mcs[0].GameType__c == 'PC') {
   textField = true;
```

```
}
system.assertEquals(textField, true);
```

SEE ALSO:

Salesforce Help: Custom Metadata Relationships

General Setup

Control who can view record names in lookup fields with a new setting instead of a release update.

IN THIS SECTION:

Require the View All Lookup Record Names Permission

To better protect your Salesforce org's data, you can restrict who can view record names in lookup fields and system fields, such as Created By and Last Modified By. If you enable the Require permission to view record names in lookup fields setting, users need Read access to these records or the View All Lookup Record Names permission to view this data. Previously, this behavior was set to be enforced in a release update, but instead the functionality is now an opt-in setting so you can enable it when it best suits your org.

Require Permission to View Record Names in Lookup Fields (Update, Retired)

This update has been retired. Salesforce won't enable this update in all Salesforce orgs. Instead, you can choose when to restrict who can view record names in lookup fields with an opt-in setting on the Sharing Settings page.

Get More Predictable Target Behavior for Non-External Hyperlinks

The Salesforce app handles target values for non-external hyperlinks more predictably. If you set a hyperlink target to `"_top"`, the link opens within Lightning Experience. Setting a hyperlink target to `"_blank"` opens it in a new window outside of Lightning Experience.

Require the View All Lookup Record Names Permission

To better protect your Salesforce org's data, you can restrict who can view record names in lookup fields and system fields, such as Created By and Last Modified By. If you enable the Require permission to view record names in lookup fields setting, users need Read access to these records or the View All Lookup Record Names permission to view this data. Previously, this behavior was set to be enforced in a release update, but instead the functionality is now an opt-in setting so you can enable it when it best suits your org.

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

Why: Admins have more control over what users see in records. If the Require permission to view record names in lookup fields setting isn't enabled, users can view record names in lookup fields without Read access to those records.

After the Require permission to view record names in lookup fields setting is enabled, 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: To enable this setting, from Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**. Click **Edit** in the Organization-Wide Defaults area, then select **Require permission to view record names in lookup fields**.

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.

SEE ALSO:

> Require Permission to View Record Names in Lookup Fields (Update, Retired)
>
> *Salesforce Help*: Require Permission to View Record Names in Lookup Fields (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: "View All" and "Modify All" Permissions Overview (can be outdated or unavailable during release preview)

Require Permission to View Record Names in Lookup Fields (Update, Retired)

This update has been retired. Salesforce won't enable this update in all Salesforce orgs. Instead, you can choose when to restrict who can view record names in lookup fields with an opt-in setting on the Sharing Settings page.

When: This update has been retired and no longer appears on the Release Updates page in Setup.

How: To enable the opt-in setting, from Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**. Click **Edit** in the Organization-Wide Defaults area, then select **Require permission to view record names in lookup fields**.

SEE ALSO:

> Release Updates
>
> Require the View All Lookup Record Names Permission

Get More Predictable Target Behavior for Non-External Hyperlinks

The Salesforce app handles target values for non-external hyperlinks more predictably. If you set a hyperlink target to `"_top"`, the link opens within Lightning Experience. Setting a hyperlink target to `"_blank"` opens it in a new window outside of Lightning Experience.

What: The `showHeader=false` property isn't supported in Lightning, so non-external hyperlinks always open inside a Lightning header.

Security and Identity

Simplify web session management with OAuth 2.0 updates. Manage My Domains more easily. New datasets help you analyze usage across Salesforce in the Event Monitoring Analytics app. And Security Center offers more hands-on ways to view your security data.

IN THIS SECTION:

Identity and Access Management

Simplify web session management for hybrid apps with the new OAuth 2.0 hybrid app flows. Other OAuth flow updates include an option to require client secrets during refresh token flows and an increased size limit for access and refresh tokens. Get more guidance and login metrics from the Multi-Factor Authentication Assistant. You can now monitor how your third-party identity providers authenticate users logging into your Salesforce org through OpenID Connect on the Login History page. And we renamed Identity Confirmation to Device Activation.

Domains

Easily rename and manage your org's My Domain. Improve connectivity with Salesforce Edge Network and test custom domains in a sandbox. Deploy a My Domain and enable HTTPS on your Salesforce Sites and Experience Cloud sites domains.

Salesforce Shield

The Event Monitoring Analytics app offers a slew of new datasets to help you analyze usage across Salesforce. Real-Time Event Monitoring now supports automated, programmatic setup with Metadata API. Lightning event types include a CLIENT_GEO field to help you locate client browser requests. Shield Platform Encryption now supports the Utterance field on the Utterance Suggestion object. You can also synchronize large amounts of records with your encryption policies faster and more efficiently.

Security Center

Security Center offers more hands-on ways to view your security data. Detail pages have improved graphs to help you easily see when changes happen. You can now update metric data on-demand instead of waiting for the daily scheduled app updates. And you can now see a 30-day trend graph of average Health Check scores plus 6 months of historical Health Check information right from the app. All the extra detail helps you respond proactively to changes and settings that touch sensitive customer data.

Other Security Changes

Select a default owner for records created by Salesforce Site guest users. And in Summer '21, the Require secure connections (HTTPS) for all third-party domains setting gets enabled then removed because it can no longer be disabled.

Identity and Access Management

Simplify web session management for hybrid apps with the new OAuth 2.0 hybrid app flows. Other OAuth flow updates include an option to require client secrets during refresh token flows and an increased size limit for access and refresh tokens. Get more guidance and login metrics from the Multi-Factor Authentication Assistant. You can now monitor how your third-party identity providers authenticate users logging into your Salesforce org through OpenID Connect on the Login History page. And we renamed Identity Confirmation to Device Activation.

IN THIS SECTION:

Enable Hybrid Apps to Directly Manage Web Sessions

Use the OAuth 2.0 hybrid app flows to avoid the complexity of managing web sessions for hybrid apps. With a typical user-agent or refresh token flow, a hybrid app sets requested domain cookies and bridges an access token into a web session. But the access token and web session aren't connected in these flows. Instead you must track when the access and refresh tokens expire and when the web session expires, and then manually rebridge the session to avoid interrupted service. The OAuth 2.0 hybrid app flows connect the access and refresh tokens with the web session to give hybrid apps direct web session management.

Require the Client Secret during the Refresh Token Flow

You can configure connected apps to require client secrets during the OAuth 2.0 refresh token and hybrid refresh token flows. For web-server based apps that can protect client secrets, you can configure the connected app to require client secrets. But for apps that can't protect client secrets, such as mobile apps or apps installed on a user's computer, you can omit the client secret during the refresh token flow. If you don't require a client secret during the refresh token flow and a connected app sends the client secret in the authorization request, Salesforce still validates it.

Reduce Hybrid Mobile App Session Interruptions with a New Frontdoor.jsp Parameter

To streamline how your org uses frontdoor.jsp to authorize hybrid app user sessions, use the `directBridge2` parameter with the new OAuth 2.0 hybrid app token flows. After a user authenticates and starts a new session, the `directBridge2` parameter directly passes the access token to the session ID cookie of the requested domain. This flow prevents interruptions when the refresh token flow is triggered because the hybrid app uses the same access token for both API calls and UI requests.

Get More Guidance from the Multi-Factor Authentication Assistant

To help with your multi-factor authentication (MFA) implementation, the Multi-Factor Authentication Assistant now provides access to an MFA Accelerator webinar and to login metrics in the Lightning Usage App. The Accelerator webinar replaces the User Authentication Trailhead module that was previously available in the Assistant.

Monitor Login Metrics for Your Org's Identity Services

User login security is a cornerstone of protecting your data, and login metrics give you insight into user login activity. The new Login Metrics tab in the Lightning Usage App provides data for your org's identity services, including multi-factor authentication (MFA) and single sign-on. If you're implementing MFA, you can use login metrics to monitor MFA adoption. We also added MFA as a feature in the Salesforce Optimizer App to help you track the users who are (or aren't) logging in with MFA.

Monitor How Your Identity Providers Authenticate Your Users with Authentication Method Reference

Get a better understanding of how your third-party identity provider (IdP) authenticates users logging into Salesforce through OpenID Connect (OIDC). Check the Authentication Method Reference column of your Salesforce org's Login History to see which authentication methods are used.

Easily Integrate Larger Access and Refresh Tokens for OpenID Connect

The limit for access and refresh tokens is increased to 10,000 characters, which means you can now choose from more third-party identity providers to configure for Salesforce. Previously, the limit was 2,000 characters for each access token and 1,024 characters for each refresh token.

Identity Confirmation Is Now Device Activation

When your users log in from an unrecognized browser or application (device), the identity verification type required from them is now called device activation. Previously, we sometimes called it identity confirmation. Device activation more accurately reflects what happens and is the industry standard term.

Manage Access to Login Flows with Profile Filtering

To increase security, your users are now restricted from configuring login flows when you turn on Profile Filtering. With Profile Filtering enabled, your users need the View All Profiles permission to configure login flows.

Enable Hybrid Apps to Directly Manage Web Sessions

Use the OAuth 2.0 hybrid app flows to avoid the complexity of managing web sessions for hybrid apps. With a typical user-agent or refresh token flow, a hybrid app sets requested domain cookies and bridges an access token into a web session. But the access token and web session aren't connected in these flows. Instead you must track when the access and refresh tokens expire and when the web session expires, and then manually rebridge the session to avoid interrupted service. The OAuth 2.0 hybrid app flows connect the access and refresh tokens with the web session to give hybrid apps direct web session management.

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

When: The OAuth 2.0 hybrid app flows were developed to support Mobile SDK 9.1, which is scheduled for release early in 2021.

Why: During the OAuth 2.0 hybrid app token flow, the authorizing server grants an access token and session IDs (SID) for the requested domains in its response. After authorization, the hybrid app directly sets the SIDs of the requested domains in the session cookies and uses frontdoor.jsp to bridge an access token into a web session. During the hybrid refresh token flow, when a new access token is granted, the hybrid app receives updated domain SIDs. It can directly reset the session cookies and avoid interruptions.

How: To implement the OAuth 2.0 hybrid app token and hybrid refresh token flows for a hybrid app, create a connected app to represent the hybrid app. Then assign the `lightning`, `content`, `refresh_token`, `visualforce`, and `web` scopes to the connected app. After your connected app is configured, implement the hybrid token flows for the connected app.

Salesforce Help: OAuth 2.0 Authorization and Session Management for Hybrid Apps (can be outdated or unavailable during release preview)

Require the Client Secret during the Refresh Token Flow

You can configure connected apps to require client secrets during the OAuth 2.0 refresh token and hybrid refresh token flows. For web-server based apps that can protect client secrets, you can configure the connected app to require client secrets. But for apps that can't protect client secrets, such as mobile apps or apps installed on a user's computer, you can omit the client secret during the refresh token flow. If you don't require a client secret during the refresh token flow and a connected app sends the client secret in the authorization request, Salesforce still validates it.

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

When: For new connected apps, this selection is automatically enabled. For connected apps created before the Spring '21 release, this selection isn't automatically enabled.

How: To configure the connected app to require its client secret during the refresh token flow, select **Require Secret for Refresh Token Flow** on the Connected App page.

Salesforce Help: Enable OAuth Settings for API Integration (can be outdated or unavailable during release preview)

Reduce Hybrid Mobile App Session Interruptions with a New Frontdoor.jsp Parameter

To streamline how your org uses frontdoor.jsp to authorize hybrid app user sessions, use the `directBridge2` parameter with the new OAuth 2.0 hybrid app token flows. After a user authenticates and starts a new session, the `directBridge2` parameter directly passes the access token to the session ID cookie of the requested domain. This flow prevents interruptions when the refresh token flow is triggered because the hybrid app uses the same access token for both API calls and UI requests.

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

When: The OAuth 2.0 hybrid app flows were developed to support Mobile SDK 9.1, which is scheduled for release early in 2021.

How: Make a POST request to frontdoor.jsp with the value `directBridge2=true`. Make sure that the session ID value is an OAuth 2.0 access token with a web scope and that it's passed in the POST body. The mobile app must use the OAuth 2.0 hybrid app token flows and be able to manage session cookies in the web view.

SEE ALSO:

Salesforce Help: Using Frontdoor.jsp to Bridge an Existing Session Into Salesforce (can be outdated or unavailable during release preview)

Get More Guidance from the Multi-Factor Authentication Assistant

To help with your multi-factor authentication (MFA) implementation, the Multi-Factor Authentication Assistant now provides access to an MFA Accelerator webinar and to login metrics in the Lightning Usage App. The Accelerator webinar replaces the User Authentication Trailhead module that was previously available in the Assistant.

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

When: New resources in the Multi-Factor Authentication Assistant are available for all Salesforce orgs on a rolling basis between January 8, 2021 and February 13, 2021. Tell Me More links for new resources aren't available in sandbox orgs until February 13, 2021.

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

To register for an MFA Accelerator webinar, go to the Get Ready phase and click **Register for Webinar** in the Learn stage. In this Accelerator webinar, Salesforce security experts walk you through how to plan, implement, and roll out MFA.

To monitor how many users are logging in with your org's identity services, go to the Manage phase and click **Open App** for the Monitor login metrics step in the Measure stage. The Lightning Usage App shows MFA, single sign-on (SSO), and basic authentication usage metrics, aggregated over the last 7 days and the last 3 months.

SEE ALSO:

Monitor Login Metrics for Your Org's Identity Services

Monitor Login Metrics for Your Org's Identity Services

User login security is a cornerstone of protecting your data, and login metrics give you insight into user login activity. The new Login Metrics tab in the Lightning Usage App provides data for your org's identity services, including multi-factor authentication (MFA) and single sign-on. If you're implementing MFA, you can use login metrics to monitor MFA adoption. We also added MFA as a feature in the Salesforce Optimizer App to help you track the users who are (or aren't) logging in with MFA.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions. The Lightning Usage App is not available for sandbox orgs.

Why: See MFA and single sign-on (SSO) usage numbers and other login metrics in the Lightning Usage App and then head over to the Optimizer App to track adoption at the user level.

How: To access the Lightning Usage app, click ⸬ , enter `Lightning Usage`, and click **Lightning Usage.** In the left side pane under SECURITY, click **Login Metrics**. The Login Metrics page shows login data for Password-Free, single sign-on, and Username and Password login methods, with and without MFA, for the last 7 days and the last 3 months. For more MFA and security resources, click any of the links below Multi-Factor Authentication (MFA) and General Security Actions.
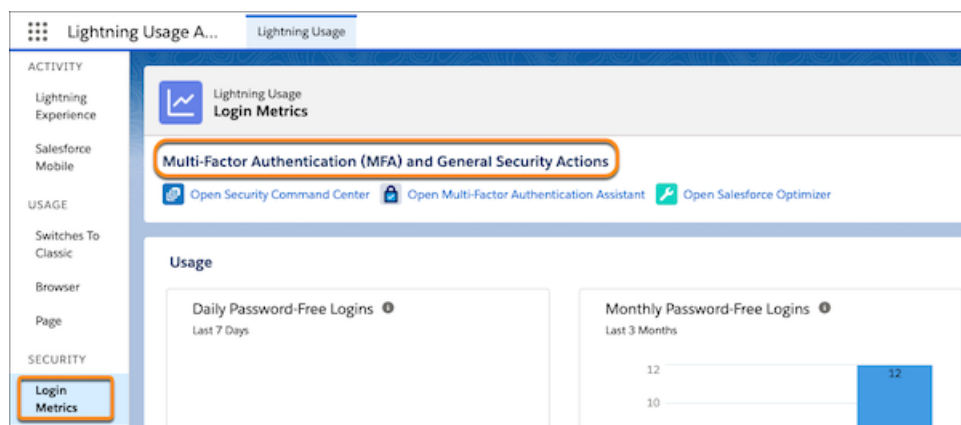
To access the Optimizer App, from Setup, in the Quick Find box, enter Optimizer, then select Optimizer. After running the report, look for the Multi-Factor Authentication Adoption feature to see a list of users who haven't logged in with MFA and the number of days since the last login with MFA.

SEE ALSO:

Monitor Logins with the Lightning Usage App

Monitor How Your Identity Providers Authenticate Your Users with Authentication Method Reference

Get a better understanding of how your third-party identity provider (IdP) authenticates users logging into Salesforce through OpenID Connect (OIDC). Check the Authentication Method Reference column of your Salesforce org's Login History to see which authentication methods are used.

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

Who: This feature is automatically available and applies to orgs with OIDC identity providers that return authentication method information, such as AuthO and Okta.

How: From Setup, in the Quick Find box, enter `Login History`, and click **Login History**. Click **Create New View**. Under Step 3: Select Fields to Display, add the **Authentication Method Reference** field. Finish creating the Login History view, and then save.
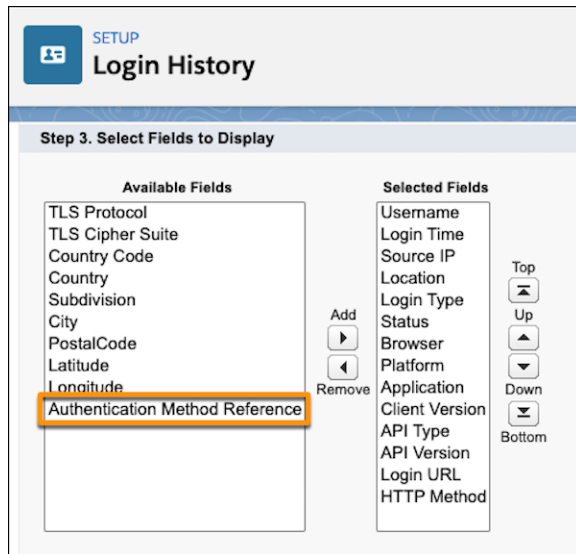
In your new Login History view is the Authentication Method Reference column, which has unique values for each authentication method used. The values are pulled from JSON strings returned by your identity provider in the OIDC ID token. Work with your IdP to establish definitions for the values used in the JSON strings.

You can also view the authentication method values in your org's event log files through Event Monitoring.

SEE ALSO:

Salesforce Help: Configure an OpenID Connect Authentication Provider (can be outdated or unavailable during release preview)

Salesforce Help: Monitor Login History (can be outdated or unavailable during release preview)

Easily Integrate Larger Access and Refresh Tokens for OpenID Connect

The limit for access and refresh tokens is increased to 10,000 characters, which means you can now choose from more third-party identity providers to configure for Salesforce. Previously, the limit was 2,000 characters for each access token and 1,024 characters for each refresh token.

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

Who: This change applies to any org using third-party authentication providers that support OpenID Connect.

SEE ALSO:

Salesforce Developer Limits and Allocations Quick Reference: API Request Limits and Allocations (can be outdated or unavailable during release preview)

Identity Confirmation Is Now Device Activation

When your users log in from an unrecognized browser or application (device), the identity verification type required from them is now called device activation. Previously, we sometimes called it identity confirmation. Device activation more accurately reflects what happens and is the industry standard term.

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

How: For example, in Session Settings for Experience Cloud user profiles, you now enable device activations for customers instead of identity confirmations for customers.

Manage Access to Login Flows with Profile Filtering

To increase security, your users are now restricted from configuring login flows when you turn on Profile Filtering. With Profile Filtering enabled, your users need the View All Profiles permission to configure login flows.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions.

SEE ALSO:

　　Salesforce Help: Limit Profile Details to Required Users

Domains

Easily rename and manage your org's My Domain. Improve connectivity with Salesforce Edge Network and test custom domains in a sandbox. Deploy a My Domain and enable HTTPS on your Salesforce Sites and Experience Cloud sites domains.

IN THIS SECTION:

Manage My Domain with Ease

Easily rename and manage your Salesforce org's My Domain. Improved Setup pages show your current My Domain login URL and any requested change to it, allowing you to quickly identify your org's current state. You can cancel a requested My Domain change or the provisioning process. And for customers with more than one domain suffix option, you can choose your My Domain suffix and deploy the change.

Improve Connectivity with Salesforce Edge Network

Improve download times and the user experience by routing your My Domain through Salesforce Edge Network. As business becomes more global, users access your Salesforce data from all over the world. Salesforce Edge Network delivers a consistent user experience regardless of a user's location.

Test Custom Domains in a Sandbox (Generally Available)

Custom domains allow you to use a domain that you own, such as https://www.example.com, to host your Salesforce org's externally facing content through Salesforce Sites and Experience Cloud sites. To make sure that it's ready for prime time, use Custom Domains in Sandbox to develop and test your custom domain before deploying it to production.

Stop Redirects from Previous My Domain URLs

To help you manage how users access your Salesforce org, you can now see if URLs for a previous My Domain are being redirected to your current My Domain. If you want to prevent redirects from those URLs, you can remove your previous My Domain. And if your previous My Domain name is different from your current My Domain name, you can move it to another org.

Enable HTTPS on Your Domains

To safeguard your data, Salesforce plans to disable HTTP-only domains by July 2021. Prepare for this change by moving your Salesforce Sites and Experience Cloud sites to HTTPS domains now.

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. This update was first made available in Winter '21.

This update has been retired. To remove instance names from your URLs, use enhanced domains.

Manage My Domain with Ease

Easily rename and manage your Salesforce org's My Domain. Improved Setup pages show your current My Domain login URL and any requested change to it, allowing you to quickly identify your org's current state. You can cancel a requested My Domain change or the provisioning process. And for customers with more than one domain suffix option, you can choose your My Domain suffix and deploy the change.

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

How: All options that require you to redeploy your My Domain now are grouped under My Domain Details on the reorganized My Domain Setup page.

Understand the changes that you're making by reviewing your current My Domain URL (1) and the My Domain to be deployed (3). For customers who can choose a different domain suffix, the Domain Suffix dropdown (2) appears. For example, change your org's My Domain URL from example.cloudforce.com to example.my.salesforce.com.

After you change your My Domain name or suffix, Salesforce provisions the new My Domain. During the provisioning process, we perform a cursory check to ensure that you have network access to the new domains.

If a new My Domain request or My Domain change is in progress, the My Domain Setup page shows where you are in the process (1). It displays your current and new My Domain login URLs (2), and you can cancel the provisioning process (3).

After provisioning is complete and you log in using your new My Domain URL, the Setup page clearly displays the status.
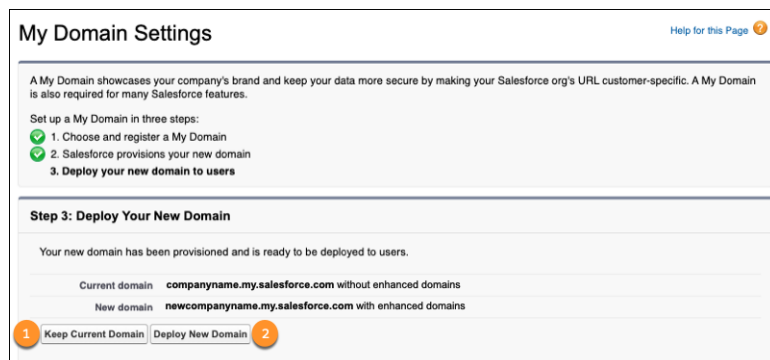
From here, you can cancel the new My Domain request (1), or you can deploy the new domain (2) to begin using it.

How: To set up My Domain or manage your existing My Domain, from Setup, in the Quick Find box, enter `My Domain`, and select **My Domain**.

SEE ALSO:

Salesforce Help: My Domain (can be outdated or unavailable during release preview)

Improve Connectivity with Salesforce Edge Network

Improve download times and the user experience by routing your My Domain through Salesforce Edge Network. As business becomes more global, users access your Salesforce data from all over the world. Salesforce Edge Network delivers a consistent user experience regardless of a user's location.

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

Who: Salesforce orgs with a deployed My Domain. Public Cloud, Salesforce Government Cloud, Customer 360 Data Manager, and some individual orgs are currently excluded from the move to Salesforce Edge Network.

Why: Users expect to access information quickly whenever they need it. Salesforce Edge Network brings Salesforce services closer to the user on the trusted Salesforce infrastructure.

Salesforce Edge Network routes requests to the closest Salesforce location where Salesforce Edge Network is deployed. It then uses a range of services to improve your users' experience, including Transport Layer Security (TLS) termination, Static Caching, and Transmission Control Protocol (TCP) optimization.

How: We recommend testing all My Domain changes in a sandbox environment before updating production.

Prepare your org before activating Salesforce Edge Network. If you allowlist Salesforce IP addresses by region, Salesforce recommends that you include our current IP address ranges for regions where you have end users. If you use client-side certificate pinning to validate the server's certificate, Salesforce doesn't recommend pinning leaf certificates. Because Salesforce Edge Network uses data center specific certificates, Salesforce recommends that you pin the intermediate certificate instead for a better experience.

From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. Under Routing, click **Edit**. Select **Use Salesforce Edge Network** and save your changes.

⊘ **Important:** Moving to Salesforce Edge Network can only be undone by Salesforce Customer Support.

When enabled, Salesforce Edge Network is used to route most domains for your org.

Test Custom Domains in a Sandbox (Generally Available)

Custom domains allow you to use a domain that you own, such as https://www.example.com, to host your Salesforce org's externally facing content through Salesforce Sites and Experience Cloud sites. To make sure that it's ready for prime time, use Custom Domains in Sandbox to develop and test your custom domain before deploying it to production.

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

Who: Government Cloud, Public Cloud, and Hyperforce orgs are currently excluded from Custom Domains in Sandbox.

How: From Setup in production, in the Quick Find box, enter `Domains`, and then select **Domains**. Add a domain or edit an existing domain. On the Domain page, select an HTTPS option other than the Salesforce CDN. Select your sandbox in the Associated Org field, and save your changes.

To finish adding your custom domain, activate the domain. Then log in to the sandbox to update the domain for your sandbox Salesforce Sites or Experience Cloud sites.

See Salesforce Help for considerations when you refresh, clone, or delete a sandbox with a custom domain.

Stop Redirects from Previous My Domain URLs

To help you manage how users access your Salesforce org, you can now see if URLs for a previous My Domain are being redirected to your current My Domain. If you want to prevent redirects from those URLs, you can remove your previous My Domain. And if your previous My Domain name is different from your current My Domain name, you can move it to another org.

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

Who: Salesforce orgs with a deployed My Domain that has been renamed.

Why: When you rename your My Domain name or change your My Domain suffix, Salesforce redirects any requests to your previous My Domain URLs to your current My Domain. If URLs for a previous My Domain are being redirected to your current My Domain, that previous URL is listed on the My Domain Setup page under Routing.

Redirecting your previous My Domain's URLs is convenient for users who haven't updated their bookmarks and links. When you change your My Domain due to a rebrand, now you can decide when to stop redirecting those URLs.

Also, My Domain names are unavailable to other Salesforce orgs when they're used in or associated with another org. If you change an org's My Domain name, removing the previous My Domain allows it to be used in another Salesforce org.

How: From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. Under Routing, click **Edit**, click **Remove Previous My Domain**, and then confirm your decision.

SEE ALSO:

Salesforce Help: Remove Your Previous My Domain (can be outdated or unavailable during release preview)

Enable HTTPS on Your Domains

To safeguard your data, Salesforce plans to disable HTTP-only domains by July 2021. Prepare for this change by moving your Salesforce Sites and Experience Cloud sites to HTTPS domains now.

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

Why: HTTPS has Transport Layer Security (TLS) protocol, which makes it more secure than HTTP. TLS is designed to facilitate data security and privacy for communications over the internet.

How: Custom domains allow you to use a domain that you own, such as https://www.example.com, to host your org's externally facing content through Salesforce Sites and Experience Cloud sites. To enable HTTPS on a custom domain, from Setup, in the Quick Find box, enter `Domains`, and then select **Domains**. Edit the custom domain. On the Domain Details page, select a HTTPS option other than **Salesforce serves the domain over HTTP without support for HTTPS access**, and select **Enable Strict Transport Security headers**. Save your changes. Then, in the Quick Find box, enter `Session Settings`, and then select **Session Settings**. Select **HSTS for Salesforce Sites and Experience Cloud Sites** and click **Save**.

For Salesforce Sites and Experience Cloud sites that aren't served on a custom domain, we recommend upgrading all requests for those domains to HTTPS. From Setup, in the Quick Find box, enter `Sites`, and then select **Sites**. Click the site label, then click **Edit**. On the Site Details page, select **Require Secure Connections (HTTPS)** and **Upgrade all requests to HTTPS**. Save your changes. Then, in the

Quick Find box, enter `Session Settings`, and then select **Session Settings**. Select **HSTS for Salesforce Sites and Experience Cloud Sites** and click **Save**.

Deploy a My Domain (Previously Released 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. This update was first made available in Winter '21.

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. All production orgs created in Winter '21 or later get a My Domain by default.

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, to set up single sign-on (SSO) with external vendors, and to use newer services like Customer 360 Data Manager. 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 it 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 Winter '22 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 it's set.

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Retired)

This update has been retired. To remove instance names from your URLs, use enhanced domains.

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

When: This update has been retired and no longer appears in the Release Update page in Setup.

Why: An instance name identifies where your Salesforce org is hosted. In orgs with a deployed My Domain, this release update removed instance names from several URLs, making the URLs shorter and easier for users to remember. Several browsers and operating systems

updated their URL requirements after this release update was first available. Enhanced domains provide the latest standard for your Salesforce org's URLs.

How: To remove instance names from your org's URLs and meet the latest browser requirements, enable enhanced domains.

To enable or disable the URL changes previously controlled by this release update, use the new My Domain Settings field: Remove instance names from Visualforce, Experience Builder, Site.com, and content file URLs. To access the new field, from Setup, in the Quick Find Box, enter `My Domain`, and then select **My Domain**. Under My Domain Details, click **Edit**.

> 📝 Note: When the instance name is removed from your URLs, your hostnames change. See My Domain URL Formats in Salesforce Help for details.

SEE ALSO:

Winter '21 Release Notes: Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files

Salesforce Help: My Domain URL Formats (can be outdated or unavailable during release preview)

Release Updates

Salesforce Shield

The Event Monitoring Analytics app offers a slew of new datasets to help you analyze usage across Salesforce. Real-Time Event Monitoring now supports automated, programmatic setup with Metadata API. Lightning event types include a CLIENT_GEO field to help you locate client browser requests. Shield Platform Encryption now supports the Utterance field on the Utterance Suggestion object. You can also synchronize large amounts of records with your encryption policies faster and more efficiently.

IN THIS SECTION:

Shield Platform Encryption

Add extra security to potentially sensitive data used to train bots. You can now encrypt the Utterance field on the Utterance Suggestion object and participant responses to Salesforce Surveys. The background encryption service also syncs large amounts of records faster and more efficiently.

Event Monitoring

You can now analyze more data with the new datasets that are available in the Event Monitoring Analytics app. You can automate Real-Time Event Monitoring setup with the Metadata API. Locate users in all Lightning event types with the new CLIENT_GEO field. Use the new UserId filter on ReportEvent queries to focus on user activity (Beta).

Shield Platform Encryption

Add extra security to potentially sensitive data used to train bots. You can now encrypt the Utterance field on the Utterance Suggestion object and participant responses to Salesforce Surveys. The background encryption service also syncs large amounts of records faster and more efficiently.

IN THIS SECTION:

Encrypt Utterance Data for Bots

If you use bots to help customers achieve the best possible outcome, you can now encrypt potentially sensitive data used in bot training. Encrypting data in the Utterance field on the Utterance Suggestion object can help you meet your HIPPA compliance requirements. For the best possible recommendation results, use the case-sensitive deterministic encryption scheme.

Encrypt More Data Faster with Background Encryption

Shield Platform Encryption has optimized the background encryption service to sync more records more efficiently. Synchronization processes that you start from the Encryption Statistics page finish faster. And customers with large amounts of data now benefit from a more time-efficient Salesforce Customer Support experience. Get back to the business of your business with newly quadrupled record volume and faster sync operations.

Encrypt Information Submitted in Surveys

You can now encrypt sensitive or personally identifiable information entered in Salesforce Survey responses. Shield Platform Encryption offers probabilistic encryption on the Date Value, Date Time Value, Choice Value, and Response Value fields on the Survey Question Response object.

Encrypt Utterance Data for Bots

If you use bots to help customers achieve the best possible outcome, you can now encrypt potentially sensitive data used in bot training. Encrypting data in the Utterance field on the Utterance Suggestion object can help you meet your HIPPA compliance requirements. For the best possible recommendation results, use the case-sensitive deterministic encryption scheme.

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 Shield Platform Encryption and Service Cloud with Chat enabled.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit**, and click the Utterance field. The Utterance field only supports the case-insensitive deterministic encryption scheme. You can use the background encryption service to encrypt existing field data. Normal cache management tasks delete Utterance field data on average every 7 days.

SEE ALSO:

Increase Security with Shield Platform Encryption for Einstein Bots

Salesforce Help: Which Standard Fields Can I Encrypt? (can be outdated or unavailable during release preview)

Salesforce Help: Improve Intent Matching Quality with Bot Training (can be outdated or unavailable during release preview)

Encrypt More Data Faster with Background Encryption

Shield Platform Encryption has optimized the background encryption service to sync more records more efficiently. Synchronization processes that you start from the Encryption Statistics page finish faster. And customers with large amounts of data now benefit from a more time-efficient Salesforce Customer Support experience. Get back to the business of your business with newly quadrupled record volume and faster sync operations.

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

SEE ALSO:

Salesforce Help: Synchronize Your Data Encryption with the Background Encryption Service (can be outdated or unavailable during release preview)

Encrypt Information Submitted in Surveys

You can now encrypt sensitive or personally identifiable information entered in Salesforce Survey responses. Shield Platform Encryption offers probabilistic encryption on the Date Value, Date Time Value, Choice Value, and Response Value fields on the Survey Question Response object.

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 a Salesforce Shield or Shield Platform Encryption add-on subscription and enabled Salesforce Surveys.

How: Enable Salesforce Surveys in your org first. And then from Setup, in the Quick Find box, enter `Encryption Policy`, and select **Encrypt Fields**. Click **Edit**, and select a field.

SEE ALSO:

> Encrypt Responses in a Survey
>
> *Salesforce Help*: Which Standard Fields Can I Encrypt?

Event Monitoring

You can now analyze more data with the new datasets that are available in the Event Monitoring Analytics app. You can automate Real-Time Event Monitoring setup with the Metadata API. Locate users in all Lightning event types with the new CLIENT_GEO field. Use the new UserId filter on ReportEvent queries to focus on user activity (Beta).

IN THIS SECTION:

Analyze More Events in the Event Monitoring Analytics App

The Event Monitoring Analytics app just got more user-friendly with more event data. With the new event datasets, you can analyze more API usage and Apex data in the Analytics app without uploading the dataset manually or via the Analytics External Data API.

Default Answers Changed in Analytics App Setup Wizard

When you create an Event Monitoring Analytics app using the Personalize wizard in Analytics Studio, the default is now No for each dataset you can select to include in your app. Previously, the default was Yes for all datasets, which meant that all datasets were included unless you explicitly set each one to No.

Automate Real-Time Event Monitoring Setup with Metadata API

Now you can enable and disable streaming and storing of all Real-Time Events using the Metadata API to automate setup for Real-Time Event Monitoring. Previously, you only used the UI to enable and disable streaming and storing for individual events.

Locate Users in All Lightning Event Types

Use the new CLIENT_GEO field to locate the country and region of requests from the client's browser. The CLIENT_GEO field is available in all the Lightning event types: Lightning Error, Lightning Interaction, Lightning Page View, and Lightning Performance. As an admin you can monitor the performance of Lightning pages by country to optimize your users' Salesforce experience and improve your business workflow.

Get Information About Commerce Events in the EventLogFile

The new One Commerce Usage event type in the EventLogFile object captures information about your Commerce instance. Use this event to analyze the health of your services and identify potential issues.

Track Identity Providers for Authentication Requests

The `IdentityProviderEventStore` big object is now available to monitor authentication request events from another app provider. You can also use it to monitor outbound SAML responses when Salesforce is acting as an identity provider.

Get Information About Lightning Component Requests in the EventLogFile

The new Aura Request event type in the `EventLogFile` object captures information about requests to Apex methods from Aura or Lightning web components. Use this event to analyze performance and identify potential issues. For example, you can benchmark request time or identify the URI of an unsuccessful request.

In standard SOQL queries for ReportEvent, you can now filter event data by the UserID field. For example, you can get all report activity by a specific user in the last 3 days. Previously, you could only filter on EventDate and EventIdentifier in standard SOQL queries for ReportEvent.

Analyze More Events in the Event Monitoring Analytics App

The Event Monitoring Analytics app just got more user-friendly with more event data. With the new event datasets, you can analyze more API usage and Apex data in the Analytics app without uploading the dataset manually or via the Analytics 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.

Why: For example, you can create a lens in your Analytics app with data from the Apex Callout dataset that shows how many Apex Callout requests your organization executed yesterday. You can also see the average request time for your Apex Callout requests last month.

How: Create an Event Monitoring Analytics app or upgrade your existing app to take advantage of these new datasets:

- Apex Callout: Details about callouts (external requests) during Apex code execution
- Apex REST API: Captures information about every Apex REST API request
- Apex SOAP: Details about Web Services API call details
- Apex Trigger: Details about triggers that fire in an org
- Bulk API: Details about Bulk API requests
- Concurrent Long-Running Apex Limit: Information about long-running concurrent Apex requests in your org that Salesforce terminated after reaching your org's concurrency limit
- Knowledge Article View: User activity with your knowledge base
- Search: Details about user search queries
- Search Click: Details about user interaction with the search results
- Wave Download: Downloads made from lens explorations and dashboard widgets

SEE ALSO:

Salesforce Help: Upgrade the Event Monitoring Analytics App

Object Reference: Apex Callout Event Type

Object Reference: Apex REST API Event Type

Object Reference: Apex SOAP Event Type

Object Reference: Apex Trigger Event Type

Object Reference: Bulk API Event Type

Object Reference: Concurrent Long-Running Apex Limit Event Type

Object Reference: Knowledge Article View Event Type

Object Reference: Search Event Type

Object Reference: Search Click Event Type

Object Reference: Wave Download Event Type
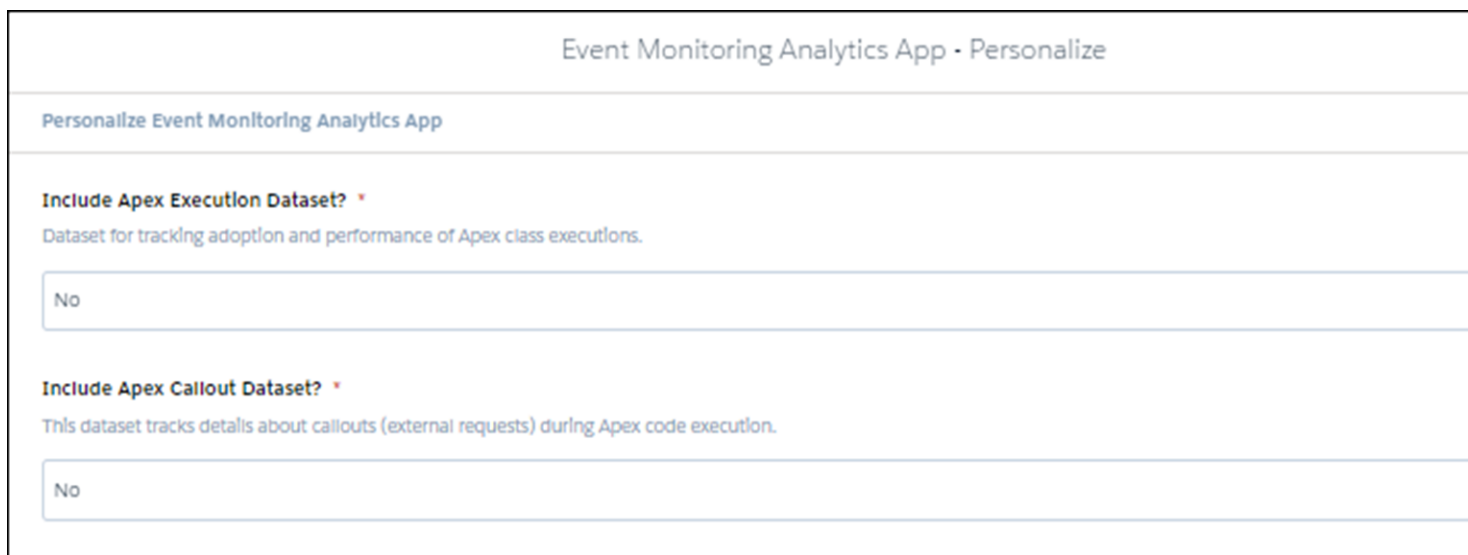
Default Answers Changed in Analytics App Setup Wizard

When you create an Event Monitoring Analytics app using the Personalize wizard in Analytics Studio, the default is now No for each dataset you can select to include in your app. Previously, the default was Yes for all datasets, which meant that all datasets were included unless you explicitly set each one to No.

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: From the dropdown list under the dataset, choose **Yes** for each dataset you want to include in your app, then specify the number of days of data to include.

SEE ALSO:

> *Salesforce Help*: Create and Share the Event Monitoring Analytics App (can be outdated or unavailable during release preview)

Automate Real-Time Event Monitoring Setup with Metadata API

Now you can enable and disable streaming and storing of all Real-Time Events using the Metadata API to automate setup for Real-Time Event Monitoring. Previously, you only used the UI to enable and disable streaming and storing for individual events.

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.

Why: When you use the UI to set streaming and storing preferences, you modify one event at a time. With the Metadata API, you can modify multiple events at the same time, programmatically.

How: Use the `package.xml` manifest file to retrieve the current settings of all of your real-time events. Use the `RealtimeEvent.settings` file to enable or disable changes for as many real-time events as you want.

SEE ALSO:

> *Metadata API Developer Guide*: Sample package.xml Manifest Files (can be outdated or unavailable during release preview)
> *Metadata API Developer Guide*: Deploying and Retrieving Metadata (can be outdated or unavailable during release preview)

Locate Users in All Lightning Event Types

Use the new CLIENT_GEO field to locate the country and region of requests from the client's browser. The CLIENT_GEO field is available in all the Lightning event types: Lightning Error, Lightning Interaction, Lightning Page View, and Lightning Performance. As an admin you can monitor the performance of Lightning pages by country to optimize your users' Salesforce experience and improve your business workflow.

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

Who: Available to customers who purchased a Salesforce Shield or Salesforce Event Monitoring add-on subscription and use the EventLogFile object data to monitor events.

SEE ALSO:

   SOAP API Developer Guide : Lightning Error Event Type (can be outdated or unavailable during release preview)

   SOAP API Developer Guide : Lightning Interaction Event Type (can be outdated or unavailable during release preview)

   SOAP API Developer Guide : Lightning Page View Event Type (can be outdated or unavailable during release preview)

   SOAP API Developer Guide : Lightning Performance Event Type (can be outdated or unavailable during release preview)

Get Information About Commerce Events in the EventLogFile

The new One Commerce Usage event type in the EventLogFile object captures information about your Commerce instance. Use this event to analyze the health of your services and identify potential issues.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

Who: Available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions and use the EventLogFile to monitor events.

SEE ALSO:

   Object Reference: One Commerce Usage Event Type

Track Identity Providers for Authentication Requests

The `IdentityProviderEventStore` big object is now available to monitor authentication request events from another app provider. You can also use it to monitor outbound SAML responses when Salesforce is acting as an identity provider.

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

Who: Available to customers who purchased a Salesforce Shield or Salesforce Event Monitoring add-on subscription and use the EventLogFile object data to monitor events.

How: Turn on storage of the event in Event Manager. Then access the event with a SOQL query.

SEE ALSO:

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

   Platform Events Developer Guide: Real-Time Event Monitoring Objects (can be outdated or unavailable during release preview)

Get Information About Lightning Component Requests in the EventLogFile

The new Aura Request event type in the `EventLogFile` object captures information about requests to Apex methods from Aura or Lightning web components. Use this event to analyze performance and identify potential issues. For example, you can benchmark request time or identify the URI of an unsuccessful request.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions and use the EventLogFile to monitor events.

SEE ALSO:

Object Reference: Aura Request Event Type

Filter on User ID for User's Report Activity (Beta)

In standard SOQL queries for ReportEvent, you can now filter event data by the UserID field. For example, you can get all report activity by a specific user in the last 3 days. Previously, you could only filter on EventDate and EventIdentifier in standard SOQL queries for ReportEvent.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

> **Note:** As a beta feature, the UserId filter in ReportEvent 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. Any use of this beta feature is subject to the Beta Services terms at https://www.salesforce.com/company/legal/agreements.jsp.

Who: Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

Salesforce Help: Real-Time Event Monitoring Data Storage (can be outdated or unavailable during release preview)

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

Security Center

Security Center offers more hands-on ways to view your security data. Detail pages have improved graphs to help you easily see when changes happen. You can now update metric data on-demand instead of waiting for the daily scheduled app updates. And you can now see a 30-day trend graph of average Health Check scores plus 6 months of historical Health Check information right from the app. All the extra detail helps you respond proactively to changes and settings that touch sensitive customer data.

IN THIS SECTION:

Update Metric Data On-Demand

You no longer need to wait for Security Center's daily update to see the latest metric data. You can now update individual metrics as needed. On-demand metric updates give you the latest information so that you can make informed decisions. And they can help you monitor fast-moving situations.

See Historical Health Check Details in Security Center

Now you can access more Security Health Check data from the Security Center app. The Security Health Check detail page has a new trend graph to help you scan average Health Check scores for all connected tenants over time. You can also see the last 6 months of Health Check data right from Security Center, saving you clicks and time.

Spotlight Change with Improved Detail Page Charts

The new Daily Changes chart overlay offers a clearer view of metric changes for each day. Now you can easily see when changes happened on specific days.

Update Metric Data On-Demand

You no longer need to wait for Security Center's daily update to see the latest metric data. You can now update individual metrics as needed. On-demand metric updates give you the latest information so that you can make informed decisions. And they can help you monitor fast-moving situations.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription. Security Center isn't available in Government Cloud or Government Cloud Plus.

How: On a metric detail page, click **Update Data**. The status lines show when your metric was last updated and how many tenants report updated data.
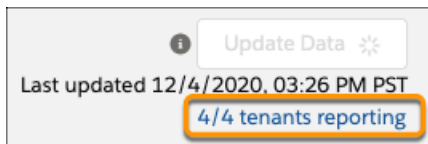
At any point during the update, you can click the **tenants reporting** link to see a list of all connected tenants and when they last reported

data.

When the update is finished, refresh the page to see updated data on the detail page. On-demand metric data update is available for all metrics except Security Health Check. You can update metric data once per hour.

SEE ALSO:

    Salesforce Help: Update Metric Data (can be outdated or unavailable during release preview)

See Historical Health Check Details in Security Center

Now you can access more Security Health Check data from the Security Center app. The Security Health Check detail page has a new trend graph to help you scan average Health Check scores for all connected tenants over time. You can also see the last 6 months of Health Check data right from Security Center, saving you clicks and time.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription. Security Center isn't available in Government Cloud or Government Cloud Plus.

How: In Security Center, select the Configuration category and click **Security Health Check**. The trend graph at the top of the page shows the daily average Health Check score for all connected tenants. To see the Health Check settings for a specific tenant on a specific day, enter a date in the date picker (1). Select a value in the Health Check Score column (2), then review the Health Check settings for that tenant on that day (3). Historical Security Health Check information is available for the previous 6 months.
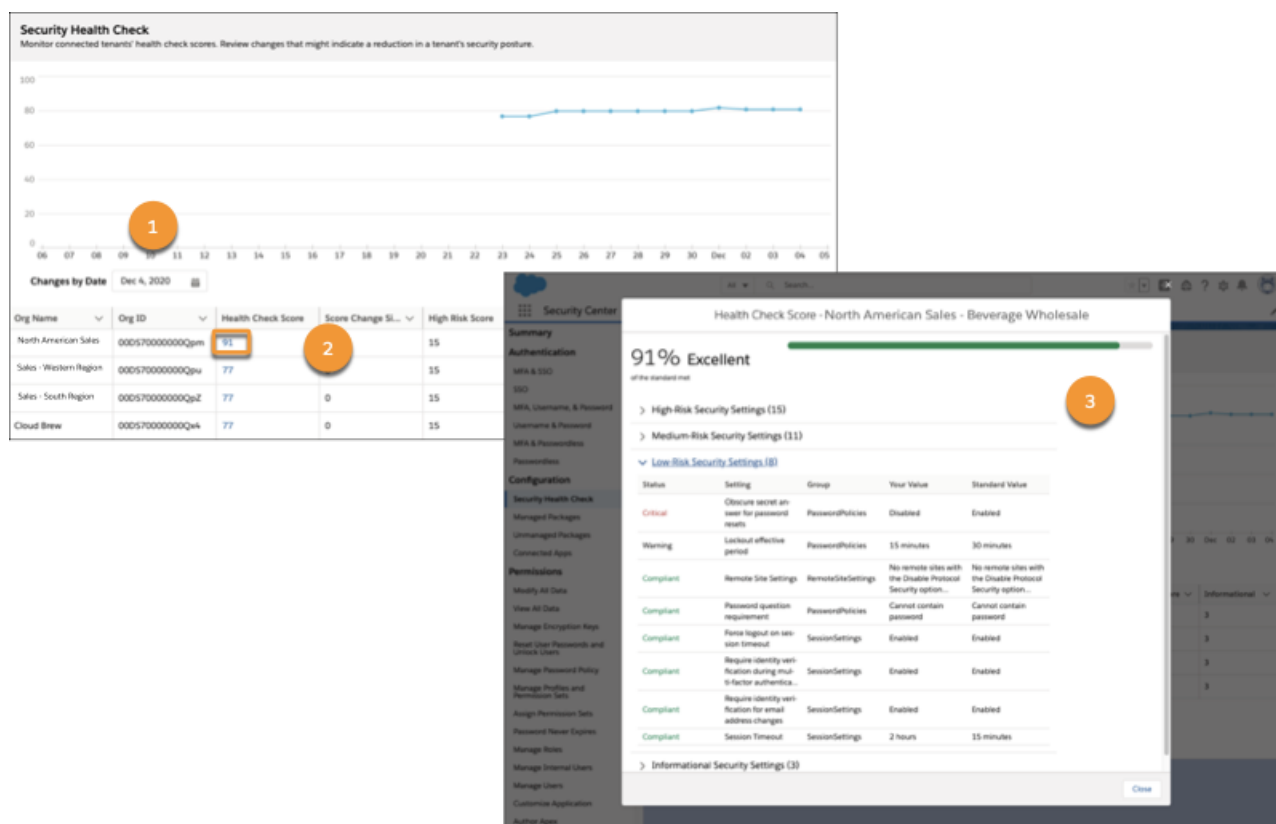
Spotlight Change with Improved Detail Page Charts

The new Daily Changes chart overlay offers a clearer view of metric changes for each day. Now you can easily see when changes happened on specific days.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription. Security Center isn't available in Government Cloud or Government Cloud Plus.

Why: The Daily Changes view is helpful when the additions and removals for a metric are the same, leaving the daily total count unchanged. For example, an admin installs five unmanaged packages and removes five other unmanaged packages in one day. The total unmanaged package count hasn't changed from the day before. The Daily Changes overlay shows those installations and removals so you can investigate them if necessary.

How: The Daily Changes view is available for all metrics in the Permissions category and all Configuration metrics except Security Health Check. Daily Changes is automatically enabled. You can hide and redisplay Daily Changes or Trend graphs by clicking the Daily Changes and Trend boxes.
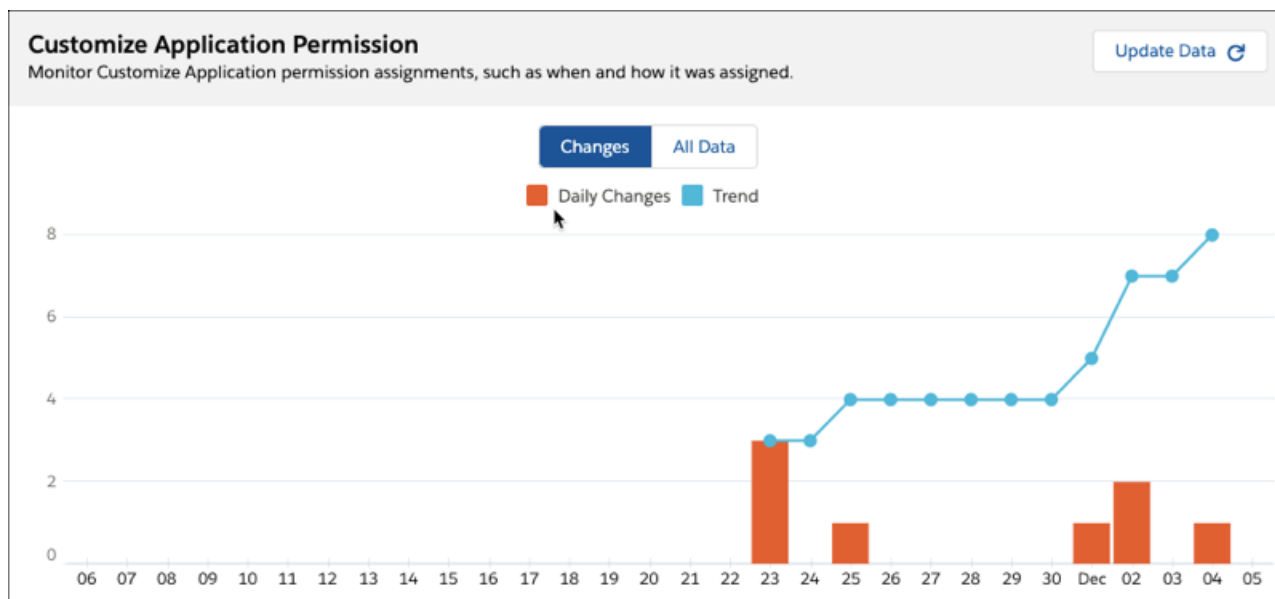
SEE ALSO:

Salesforce Help: Review Detailed Metric Data (can be outdated or unavailable during release preview)

Other Security Changes

Select a default owner for records created by Salesforce Site guest users. And in Summer '21, the Require secure connections (HTTPS) for all third-party domains setting gets enabled then removed because it can no longer be disabled.

IN THIS SECTION:

Require Secure HTTPS Connections for All Third-Party Domains

As a security best practice, HTTPS connections are required to connect to third-party domains beginning in Summer '21. With enforced secure connections, HTTP-only connections are no longer permitted. The Require secure connections (HTTPS) for all third-party domains setting on the Session Settings Setup page is enabled and then removed because it can't be disabled. The Require secure connections (HTTPS) setting also is removed because it was previously enabled and can't be disabled.

Assign Records Created by Site Guest Users to a Default User

To increase the security of your Salesforce data, unauthenticated guest users no longer automatically own the records they create. Instead, when a guest user creates a record, the record ownership is reassigned to a default active user that you can select.

Require Secure HTTPS Connections for All Third-Party Domains

As a security best practice, HTTPS connections are required to connect to third-party domains beginning in Summer '21. With enforced secure connections, HTTP-only connections are no longer permitted. The Require secure connections (HTTPS) for all third-party domains setting on the Session Settings Setup page is enabled and then removed because it can't be disabled. The Require secure connections (HTTPS) setting also is removed because it was previously enabled and can't be disabled.

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

Why: HTTPS has Transport Layer Security (TLS) protocol, which makes it more secure than HTTP. TLS is designed to facilitate data security and privacy for communications over the internet.

How: To enable this setting now, from Setup, in the Quick Find Box, enter `Session Settings`, and then select **Session Settings**. Select **Require secure connections (HTTPS) for all third-party domains**.

Make sure to review and update any HTTP assets such as images, style sheets, or JavaScript files that you include on your custom pages. After this setting is enforced, these assets don't render correctly.

SEE ALSO:

Enable HTTPS on Your Domains

Summer '20 Release Notes: Require Secure HTTPS Connections (Update, Enforced)

Assign Records Created by Site Guest Users to a Default User

To increase the security of your Salesforce data, unauthenticated guest users no longer automatically own the records they create. Instead, when a guest user creates a record, the record ownership is reassigned to a default active user that you can select.

Where: This change applies to Salesforce Sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Having an internal user be the owner of records created by guest users is a Salesforce security best practice.

How: Salesforce automatically assigns the user that created the Salesforce Site as the default owner of all records created by guest users. To change the default owner for a site, from Setup, in the Quick Find Box, enter `Sites`, then select **Sites**. In the Sites list, click **Edit**, then select an active user as the **Default Record Owner** and save your changes.

SEE ALSO:

Salesforce Help: Create and Edit Salesforce Sites

Salesforce Help: Best Practices and Considerations for Using the Guest Record Default Owner

Single Source of Truth

Learn what's new with Single Source of 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

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 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.

Customer 360 Identity

Identity for Customers and Partners has a new name—meet Customer 360 Identity. We also postponed the release update that requires verification when Experience Cloud users, partners, and customers change their email address.

Customer 360 Privacy Center

Use the Portability Log to track how your org fulfills data subject access requests. Know that your customer's data is secure with automatic deletion of portability files in Customer 360 Privacy Center. And make a PATCH request on Consent Write API to simultaneously update consent on multiple records.

Customer 360 Audiences

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.

IN THIS SECTION:

See What's New with Customer 360 Audiences

Check out the latest features and updates from Customer 360 Data Audiences: Customer 360 Audiences Release Notes.

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Identity for Customers and Partners has a new name—meet Customer 360 Identity. We also postponed the release update that requires verification when Experience Cloud users, partners, and customers change their email address.

IN THIS SECTION:

Identity for Customers and Partners Was Renamed to Customer 360 Identity

Identity for Customers and Partners has a new name to reflect our dedication to providing you with a single source of truth. Meet Customer 360 Identity, which still has same identity features you know and love. Remember that you can access documentation for all of your Salesforce org's identity needs at the Identify Your Users and Manage Access tile on help.salesforce.com.

Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. This security update requires external users to confirm their community email address changes.

Identity for Customers and Partners Was Renamed to Customer 360 Identity

Identity for Customers and Partners has a new name to reflect our dedication to providing you with a single source of truth. Meet Customer 360 Identity, which still has same identity features you know and love. Remember that you can access documentation for all of your Salesforce org's identity needs at the Identify Your Users and Manage Access tile on help.salesforce.com.

Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. 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 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.

Who: This release update is for all Experience Builder sites.

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.

Customer 360 Privacy Center

Use the Portability Log to track how your org fulfills data subject access requests. Know that your customer's data is secure with automatic deletion of portability files in Customer 360 Privacy Center. And make a PATCH request on Consent Write API to simultaneously update consent on multiple records.

IN THIS SECTION:

Monitor Data Subject Access Request Fulfillment with the Portability Log

Make sure your Salesforce org is fulfilling every customer request to access personal data in accordance with data compliance law. Use the Portability Log in Customer 360 Privacy Center to see a history of all portability policies executed in your org. Customize the log to display information you want to see, such as when a policy finished executing or if your customer downloaded their portability file.

Customer 360 Privacy Center Behavior Change: Portability Files Older Than 60 Days Are Automatically Deleted

Salesforce keeps your customer data secure by automatically deleting portability files 60 days after they're generated. The admin who made the request receives an email 7 days in advance to warn them that the file is set to expire.

Sync Consent Data Across Multiple Records

A new REST API resource for Consent Write requests is now generally available.

Monitor Data Subject Access Request Fulfillment with the Portability Log

Make sure your Salesforce org is fulfilling every customer request to access personal data in accordance with data compliance law. Use the Portability Log in Customer 360 Privacy Center to see a history of all portability policies executed in your org. Customize the log to display information you want to see, such as when a policy finished executing or if your customer downloaded their portability file.

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

Who: To use this feature in the Customer 360 Privacy Center, you need the Execute Data Subject Access Policies permission.

How: From Setup, in the Quick Find box, enter `Customer 360 Privacy Center`, and then click **Portability Log**.

Customer 360 Privacy Center Behavior Change: Portability Files Older Than 60 Days Are Automatically Deleted

Salesforce keeps your customer data secure by automatically deleting portability files 60 days after they're generated. The admin who made the request receives an email 7 days in advance to warn them that the file is set to expire.

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

Who: To use this feature in the Customer 360 Privacy Center, you need the Execute Data Subject Access Policies permission.

Sync Consent Data Across Multiple Records

A new REST API resource for Consent Write requests is now generally available.

Where: This launch applies to Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions.

Why: Make a PATCH request on the Consent Write API to simultaneously update or write consent for records that have a lookup relationship or share an email address. If you use Customer 360 Audiences, you can automatically create an Individual record and connect multiple related records to it. This API streamlines how you create and maintain consent records for these objects:

- Contact
- ContactPointTypeConsent
- DataUsePurpose
- Individual
- Lead
- PersonAccount
- User

How: Use the new `/consent/action` resource.

Deployment

To use Ant Migration Tool version 51.0, install Java version 11 or later.

IN THIS SECTION:

New and Changed Components for Change Sets
The components available for a change set vary by edition. These components are now available for change sets.

The Sping '21 Ant Migration Tool (version 51.0) and later requires Java version 11 or later. Earlier Ant Migration Tool versions continue to support Java version 7 or later.

New and Changed Components for Change Sets

The components available for a change set vary by edition. These components are now available for change sets.

Platform Event Subscriber Configuration
Represents the running user and batch size settings for a platform event Apex trigger.

Discovery Model
Represents a deployed Einstein Discovery model. To learn more, see Package, Promote, and Distribute Your Predictions on page 352.

Discovery Prediction
Represents a deployed Einstein Discovery prediction definition that contains one or more Einstein Discovery models. To learn more, see Package, Promote, and Distribute Your Predictions on page 352.

Ant Migration Tool Requires Java Version 11 or Later

The Sping '21 Ant Migration Tool (version 51.0) and later requires Java version 11 or later. Earlier Ant Migration Tool versions continue to support Java version 7 or later.

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

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.

IN THIS SECTION:

Lightning Components
Customize markers and map behavior in the `lightning-map` base component.

Create a Lightning Web Component Action (Pilot)
Create a Lightning web component (LWC) and use it as a quick action. Lightning web component actions work side by side on your pages along with Lightning component and Visualforce actions. LWC actions offer advantages such as the ability to easily customize headers and footers, and to create actions that have no UI representation.

Einstein Vision and Language
Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Vision and Language APIs to easily AI-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.

Salesforce Functions: Extend Salesforce with Functions (Beta)
Salesforce Functions lets developer extend Salesforce with custom, elastically scalable business logic built with high-productivity programming languages and open-source components. Salesforce Functions reduces your infrastructure responsibilities, enabling you to build and integrate Functions-as-a-Service (FaaS) apps using the languages and tools of your choice.

Lightning Components

Customize markers and map behavior in the `lightning-map` base component.

📝 **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:

Customize Markers and Control Map Behavior in lightning-map Base Component

You can make your map look and behave the way you want. Customize map locations to use your SVG image instead of the standard Google Maps markers, or define a shaded circle, rectangle, or polygon around a location. Modify or disable the zoom and dragging behavior, or disable the map controls altogether to create a static map.

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.

Aura Components in the ui Namespace Are Being Deprecated

We plan to end support for the deprecated components on May 1, 2021.

Create Flow Builder Custom Property Editors That Access Automatic Outputs

Custom property editors can access automatic outputs, which makes it easy to use upstream variable values as options for input fields later in a flow. Previously, custom property editors could access only values that admins manually assigned to flow variables.

Lightning Web Components Playground Retired

We retired the Lightning Web Components playground and the Playground tab is no longer available in the component library. Instead, 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

We're enforcing two release updates, and we have a few more existing release updates.

SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

Customize Markers and Control Map Behavior in `lightning-map` Base Component

You can make your map look and behave the way you want. Customize map locations to use your SVG image instead of the standard Google Maps markers, or define a shaded circle, rectangle, or polygon around a location. Modify or disable the zoom and dragging behavior, or disable the map controls altogether to create a static map.

Where: This change applies to Lightning Experience, Lightning Experience Builder sites, and the Salesforce mobile app.

Why: For example, say you want to create a simple locator map to show customers where to find your business. You can remove the zoom and Map | Satellite buttons, disable dragging, and add your own SVG to use a star for the marker.
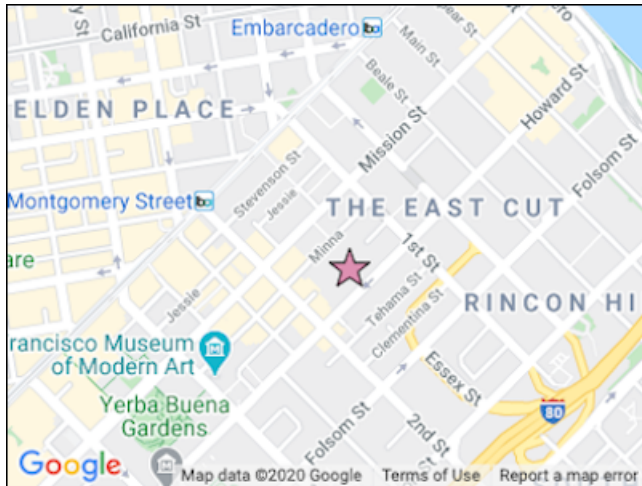
How: In your component, use the new `options` attribute to specify properties that enable or disable user interface controls. This example uses a `mapOptions` object in the component's JavaScript to set the property values.

```
<template>
    <lightning-map
        map-markers={mapMarkers}
        options={mapOptions}
    ></lightning-map>
</template>
```

In `mapOptions`, set the `disableDefaultUI` property, which disables zooming and removes the Map | Satellite buttons. To disable panning the map, set the `draggable` property.

In `mapMarkers`, add the `mapIcon` property to the marker definition, and specify the SVG `path` property for a star. Add `fillColor` and `fillOpacity` properties to set the color and opacity of the image fill. Add the `strokeWeight` property to set the line weight of the stroke drawn around the SVG image. Optionally, to determine the size of the image, set the `scale` property.

```
import { LightningElement } from 'lwc';

export default class LightningExampleMapCustomMarker extends LightningElement {
    mapOptions = {
            'disableDefaultUI': true // when true disables Map|Satellite, +|- zoom buttons
            'draggable': false, // when false prevents panning by dragging on the map
        };

    mapMarkers = [
        {
            location: {
                City: 'San Francisco',
                Country: 'USA',
                PostalCode: '94105',
                State: 'CA',
                Street: '425 Mission St',
            },
            mapIcon : {
                path: 'M 125,5 155,90 245,90 175,145 200,230 125,180 50,230 75,145 5,90
95,90 z',
                fillColor: '#CF3476',
                fillOpacity: .5,
```

```
                strokeWeight: 1,
                scale: .10,
            }
        }
    ];
}
```

The map features are also available in the `lightning:map` Aura base component.

SEE ALSO:

> lightning-map Documentation
>
> New and Changed Lightning Web Components
>
> New and Changed Aura Components

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 may encounter issues in your automated UI tests, such as broken locators. For recommendations on how to fix issues, see the Test Automation Trailblazers community group.

Aura Components in the `ui` Namespace Are Being Deprecated

We plan to end support for the deprecated components 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: Salesforce plans to end support for Aura components in the `ui` namespace on May 1, 2021. You can continue to use these components beyond May 1, 2021, but we won't accept support cases for them after that date. We first announced this deprecation plan in Winter '20.

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 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.

SEE ALSO:

[Component Library](#)

Lightning Aura Components Developer Guide: [Migrate Components from the UI Namespace](#)

Create Flow Builder Custom Property Editors That Access Automatic Outputs

Custom property editors can access automatic outputs, which makes it easy to use upstream variable values as options for input fields later in a flow. Previously, custom property editors could access only values that admins manually assigned to flow variables.

Where: This change applies to Lightning web components in Lightning Experience.

Why: You no longer introspect and describe every element in a flow to include upstream variables in picklists and other input fields.

How: In your custom property editor, expose a public property called `automaticOutputVariables`. When the custom property editor is initialized or when the admin changes a value in the custom property editor, Flow Builder passes the automatically stored values to `automaticOutputVariables`.

Write custom logic so that when an admin sets a value for a field such as a combo box or picklist, the automatically stored values appear as input options.

```
// myCustomPropertyEditor.js
import { LightningElement, api } from 'lwc';
export default class MyCustomPropertyEditor extends LightningElement {
    @api automaticOutputVariables;

    //Insert custom logic.
}
```

For example, this custom property editor gets a list of merge fields from `automaticOutputVariables` and displays them as input options for the Phone field. In this case, the merge fields are standard [phone components](#) for Home and Mobile.
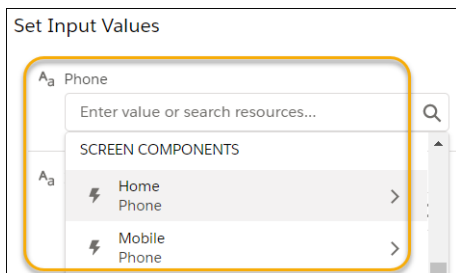
The data structure passed into the custom property editor via `automaticOutputVariables` describes the automatically stored values. In our example, the flow has two standard phone components with the API names `Home` and `Mobile`, so Flow Builder passes this data into the custom property editor.

```
    "Home":[
        {
            "apiName":"label",
            "dataType":"string",
            "description":"The label that appears above the phone field.",
            "hasDefaultValue":true,
```

```
            "isRequired":true,
            "label":"Label",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1,
            "defaultValue":"Home"
        },

        {
            "apiName":"pattern",
            "dataType":"string",
            "description":"To require the value to follow a specific pattern, use the
Inputs tab to set this attribute's value to a regular expression.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Pattern",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"placeholder",
            "dataType":"string",
            "description":"Text that appears in the field when it's empty. Use placeholder
 text to give users a hint about what to enter in the field.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Placeholder text",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"readonly",
            "dataType":"boolean",
           "description":"Prevents the user from modifying the value, but not from copying
 it.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Read Only",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"required",
            "dataType":"boolean",
            "description":"Requires the user to enter a value.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Required",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
```

```
        },
        {
            "apiName":"value",
            "dataType":"string",
            "description":"The value of the phone field. To pre-populate the field, use
the Inputs tab to set this attribute's value. To use the value elsewhere in your flow, use
 the Outputs tab to pass this attribute's value to a variable.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Value",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        }
    ]
    "Mobile":[
        {
            "apiName":"label",
            "dataType":"string",
            "description":"The label that appears above the phone field.",
            "hasDefaultValue":true,
            "isRequired":true,
            "label":"Label",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1,
            "defaultValue":"Mobile"
        },
        {
            "apiName":"pattern",
            "dataType":"string",
            "description":"To require the value to follow a specific pattern, use the
Inputs tab to set this attribute's value to a regular expression.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Pattern",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"placeholder",
            "dataType":"string",
           "description":"Text that appears in the field when it's empty. Use placeholder
 text to give users a hint about what to enter in the field.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Placeholder text",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"readonly",
```

```
            "dataType":"boolean",
         "description":"Prevents the user from modifying the value, but not from copying
 it.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Read Only",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"required",
            "dataType":"boolean",
            "description":"Requires the user to enter a value.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Required",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        },
        {
            "apiName":"value",
            "dataType":"string",
            "description":"The value of the phone field. To pre-populate the field, use
the Inputs tab to set this attribute's value. To use the value elsewhere in your flow, use
 the Outputs tab to pass this attribute's value to a variable.",
            "hasDefaultValue":false,
            "isRequired":false,
            "label":"Value",
            "isInput":true,
            "isOutput":true,
            "maxOccurs":1
        }
    ]
}
```

SEE ALSO:

   Lightning Web Components Developer Guide: Develop Custom Property Editors for Flow Builder

Lightning Web Components Playground Retired

We retired the Lightning Web Components playground and the Playground tab is no longer available in the component library. Instead, 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 is retired. All saved projects are permanently deleted. We first announced this retirement in Winter '21.

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.

You can also edit and preview your components in a third-party solution, such as webcomponents.dev, which supports the base components that don't depend on running in Salesforce.

SEE ALSO:

> *Lightning Web Components Developer Guide*: Develop Lightning Web Components Locally (Beta)
>
> *Salesforce Developers Blog*: Ecosystem Innovation with Lightning Web Components

Release Updates

We're enforcing two release updates, and we have a few more existing release updates.

IN THIS SECTION:

Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Enforced)

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.

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Enforced)

To improve security and stability, this update prevents attribute values passed to `$A.createComponent()` or `$A.createComponents()` from being interpreted as Aura function expressions. This update is enforced in Spring '21.

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. This release update doesn't affect usage of Apex setters.

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

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

Use **with sharing** for **@AuraEnabled** Apex Controllers with Implicit Sharing (Update, Enforced)

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.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Experience Builder sites, 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.

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 `@AuraEnabled` Apex code explicitly controls sharing behavior using the `with sharing` or `without sharing` keywords. If all your `@AuraEnabled` 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, in the Quick Find box, enter *Release Updates* in the Quick Find box, and then select **Release Updates**.

2. Find Use `with sharing` for `@AuraEnabled` Apex Controllers with Implicit Sharing, and click **View Details** or **Get Started**.

3. 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

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Enforced)

To improve security and stability, this update prevents attribute values passed to `$A.createComponent()` or `$A.createComponents()` from being interpreted as Aura function expressions. This update is enforced in Spring '21.

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 `$A.createComponent()` or `$A.createComponents()` throws an error instead of triggering unpredictable behavior.

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, in the Quick Find box, enter `Release Updates` in the Quick Find box, and then select **Release Updates**.

2. Find Disable Access to Non-`global` Controller Methods in Managed Packages, and click **View Details** or **Get Started**.

3. Test that your custom Aura components are working correctly.

SEE ALSO:

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. This release update doesn't affect usage of Apex setters.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Experience Builder sites, 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.

```
<aura:component controller="EnforcePrivateGetter" access="global">
    <aura:handler name="init" value="{!this}" action="{!c.doInit}"/>

    <aura:attribute type="EnforcePrivateGetter" name="apexObject" />

    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, in the Quick Find box, enter *Release Updates* in the Quick Find box, and then select **Release Updates**.

2. Find "Enforce Access Modifiers on Apex Properties in Lightning Component Markup" and click **View Details** or click **Get Started**.

3. Test the behavior of components that use Apex classes with `private` or `protected` access modifiers on getters.

SEE ALSO:

Release Updates

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

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

Where: This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Experience Builder sites, and all versions of the Salesforce app.

When: This update has been postponed indefinitely.

Why: 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.

SEE ALSO:

Lightning Components Developer Guide: $Resource

Lightning Web Components Developer Guide: Access Static Resources

Release Updates

Create a Lightning Web Component Action (Pilot)

Create a Lightning web component (LWC) and use it as a quick action. Lightning web component actions work side by side on your pages along with Lightning component and Visualforce actions. LWC actions offer advantages such as the ability to easily customize headers and footers, and to create actions that have no UI representation.

> **Note:** We provide Lightning web component actions 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. Lightning web component actions 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.

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

When: This pilot feature is available in the Spring '21 release.

Who: Available to orgs that enable the pilot feature.

How: Create a Lightning web component, then create an object-specific quick action that references the Lightning web component.

Then, add the action to the object's record page using the page layout or the Lightning App Builder.

SEE ALSO:

   Create Object-Specific Quick Actions

   More Support for Dynamic Actions

Einstein Vision and Language

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Vision and Language APIs to easily AI-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:

Einstein Vision and Language Are HIPAA Compliant

Einstein Vision and Language are now Health Insurance Portability and Accountability Act (HIPAA) compliant. Einstein Vision and Language now meet the strict HIPAA standards for processing customers' protected health information (PHI). HIPAA compliance positions Einstein Vision and Language services to provide capabilities that can be used in the highly regulated healthcare sector.

Einstein Vision

Einstein OCR (optical character recognition) now supports documents in PDF format (beta) in addition to graphic image formats. The maximum size of an image or PDF file that you can send to the optical character recognition (OCR) model increased from 5 MB to 10 MB. Einstein OCR now supports standard forms such as driver's license, Form W-2, and Form 1040.

Einstein Language

Einstein Intent support for these languages is generally available: Brazilian Portuguese, Chinese, Dutch, Japanese, and Russian. When you create an intent dataset, we now recommend a minimum of 50 examples per label. Previously, we recommended a 150-example minimum.

Einstein Vision and Language Are HIPAA Compliant

Einstein Vision and Language are now Health Insurance Portability and Accountability Act (HIPAA) compliant. Einstein Vision and Language now meet the strict HIPAA standards for processing customers' protected health information (PHI). HIPAA compliance positions Einstein Vision and Language services to provide capabilities that can be used in the highly regulated healthcare sector.

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.

SEE ALSO:

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language

Einstein Vision

Einstein OCR (optical character recognition) now supports documents in PDF format (beta) in addition to graphic image formats. The maximum size of an image or PDF file that you can send to the optical character recognition (OCR) model increased from 5 MB to 10 MB. Einstein OCR now supports standard forms such as driver's license, Form W-2, and Form 1040.

IN THIS SECTION:

Use Einstein OCR to Detect Text in PDFs (Beta)

Einstein OCR (optical character recognition) now supports documents in PDF format in addition to graphic image formats.

Detect More Text with Einstein OCR

Now you can process larger files. The maximum size of an image or PDF file that you can send to the optical character recognition (OCR) model increased from 5 MB to 10 MB.

New Field in Vision API Training Status Response

The response JSON for an Einstein Vision API call that returns the model training status contains a new field: the `globalResourceDownloadTime` field. This field is returned when the `modelType` is `image-detection`.

Use Einstein OCR to Detect Text in Common Forms

Einstein OCR (optical character recognition) can now extract text from a variety of common forms. The model infers the document layout and word relationships, then extracts the entity and value for each field in the form. For example, in a driver's license, Einstein links together the issue date of the license (09/13/2020), how the issue date is referred to on the license (4a ISS), and the entity type (issue_date), which is a consistent field name across all variations of driver's licenses.

SEE ALSO:

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision

Salesforce Einstein

Use Einstein OCR to Detect Text in PDFs (Beta)

Einstein OCR (optical character recognition) now supports documents in PDF format in addition to graphic image formats.

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.

Note: As a beta feature, Einstein OCR support for PDFs 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: To detect text in a PDF, you pass the file as you would an image file. Use either the `sampleLocation` parameter that contains the URL to the PDF file, or the `sampleContent` parameter that contains the binary content of the file uploaded as multipart/form-data. Here's an example of a cURL call to the OCR endpoint.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F
sampleLocation="https://www.cloudkicks.com/annual_report.pdf" -F task="text" -F
modelId="OCRModel" https://api.einstein.ai/v2/vision/ocr
```

SEE ALSO:

> *Einstein Platform Services Developer Guide*: What is Einstein OCR
>
> *Einstein Platform Services Developer Guide*: Detect Text

Detect More Text with Einstein OCR

Now you can process larger files. The maximum size of an image or PDF file that you can send to the optical character recognition (OCR) model increased from 5 MB to 10 MB.

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: The new maximum image size applies to the call to detect text in an image—POST `/v2/vision/ocr`.

SEE ALSO:

> *Einstein Platform Services Developer Guide*: What is Einstein OCR
>
> *Einstein Platform Services Developer Guide*: Detect Text

New Field in Vision API Training Status Response

The response JSON for an Einstein Vision API call that returns the model training status contains a new field: the `globalResourceDownloadTime` field. This field is returned when the `modelType` is `image-detection`.

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: The new field appears in the response for this call: Get training status—GET `/v2/vision/train/<MODEL_ID>`

SEE ALSO:

> *Einstein Platform Services Developer Guide*: Get Training Status

Use Einstein OCR to Detect Text in Common Forms

Einstein OCR (optical character recognition) can now extract text from a variety of common forms. The model infers the document layout and word relationships, then extracts the entity and value for each field in the form. For example, in a driver's license, Einstein links together the issue date of the license (09/13/2020), how the issue date is referred to on the license (4a ISS), and the entity type (issue_date), which is a consistent field name across all variations of driver's licenses.

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: Einstein OCR supports these forms.

- Driver's license, only United States, including Washington, DC

- Form 1040, only 2019

- Form W-2

- Passport, only Australia, Canada, United Kingdom, and United States

- Pay stub

- Permanent resident card, only United States including Washington, DC

When you call the API, you send in the form as an image or PDF. The JSON response contains key-value pairs for each field in the form. Here's an example of a cURL call to the OCR endpoint.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F
sampleLocation="https://www.cloudkicks.com/applicant_driver_license" -F task="form" -F
formType="dl" -F modelId="OCRModel" https://api.einstein.ai/v2/vision/ocr
```

The response looks like this JSON. Some objects are removed for brevity.

```
{
  "object": "predictresponse",
  "probabilities": [
    {
      "probability": 0.7815201,
      "label": "key-value",
      "boundingBox": {
        "minX": 1543,
        "minY": 420,
        "maxX": 2287,
        "maxY": 481
      },
      "attributes": {
        "blockId": 10006,
        "language": "English",
        "key": {
          "text": "4d DLN",
          "entity": "number",
          "boundingBox": {
            "minX": 1543,
            "minY": 420,
            "maxX": 1755,
            "maxY": 481
          }
        },
        "value": {
          "text": "A012345678",
          "boundingBox": {
            "minX": 1846,
            "minY": 424,
            "maxX": 2287,
            "maxY": 475
          }
        },
        "pageNumber": "1"
      }
    },
    {
      "probability": 0.80536056,
```

```
      "label": "key-value",
      "boundingBox": {
        "minX": 1418,
        "minY": 1087,
        "maxX": 2167,
        "maxY": 1155
      },
      "attributes": {
        "blockId": 10012,
        "language": "English",
        "key": {
          "text": "4a iss",
          "entity": "issue_date",
          "boundingBox": {
            "minX": 1418,
            "minY": 1087,
            "maxX": 1596,
            "maxY": 1155
          }
        },
        "value": {
          "text": "09/13/2020",
          "boundingBox": {
            "minX": 1786,
            "minY": 1090,
            "maxX": 2167,
            "maxY": 1145
          }
        },
        "pageNumber": "1"
      }
    },
    {
      "probability": 0.5779993,
      "label": "key-value",
      "boundingBox": {
        "minX": 183,
        "minY": 181,
        "maxX": 904,
        "maxY": 348
      },
      "attributes": {
        "blockId": 10001,
        "language": "English",
        "key": {
          "text": "state",
          "entity": "state",
          "boundingBox": {
            "minX": 0,
            "minY": 0,
            "maxX": 0,
            "maxY": 0
          }
        },
```

```
        "value": {
          "text": "Arizona",
          "boundingBox": {
            "minX": 183,
            "minY": 181,
            "maxX": 904,
            "maxY": 348
          }
        },
        "pageNumber": "1"
      }
    },
    ...
  ],
  "task": "form"
}
```

SEE ALSO:

    Einstein Platform Services Developer Guide: Detect Text in Standard Forms

    Einstein Platform Services Developer Guide: Detect Text

Einstein Language

Einstein Intent support for these languages is generally available: Brazilian Portuguese, Chinese, Dutch, Japanese, and Russian. When you create an intent dataset, we now recommend a minimum of 50 examples per label. Previously, we recommended a 150-example minimum.

IN THIS SECTION:

Einstein Intent Support for More Languages Generally Available

Einstein Intent support for these languages is generally available: Brazilian Portuguese, Chinese, Dutch, Japanese, and Russian. When you create an intent dataset, you specify the language. When you train that dataset, the model inherits the language of the dataset.

Create an Einstein Intent Model with Less Data

Data—the more of it the better—is key to creating a successful model. But sometimes you don't have much data or you don't have the wide variety of examples required to create an accurate model. When you create an intent dataset, which is what a model is created from, we now recommend a minimum of 50 examples per label. Previously, we recommended a 150-example minimum.

New Field in Language API Training Status Response

The response JSON for an Einstein Language API call that returns the model training status contains a new field: the `globalResourceDownloadTime` field. This field is returned when the `modelType` is `text-intent`, or `text-sentiment`.

SEE ALSO:

    Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language

    Salesforce Einstein

Einstein Intent Support for More Languages Generally Available

Einstein Intent support for these languages is generally available: Brazilian Portuguese, Chinese, Dutch, Japanese, and Russian. 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.

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

Create an Einstein Intent Model with Less Data

Data—the more of it the better—is key to creating a successful model. But sometimes you don't have much data or you don't have the wide variety of examples required to create an accurate model. When you create an intent dataset, which is what a model is created from, we now recommend a minimum of 50 examples per label. Previously, we recommended a 150-example minimum.

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: When you create a dataset, each category of data has a label. For example, a label name can be Password Help. The examples that you add to the dataset have a label. Two examples for the label Password Help are: I want to reset my password, and, I forgot my password. Now you need only 50 examples per label instead of 150 examples. This change applies to datasets with a type of `text-intent`. You create an intent dataset using one of these API calls.

- Create a dataset asynchronously—POST `/v2/language/datasets/upload`
- Create a dataset synchronously—POST `/v2/language/datasets/upload/sync`

If you create an intent dataset with less data (a minimum of 50 examples per label), use either the `multilingual-intent` or `multilingual-intent-ood` algorithm when you train the dataset to create a model.

SEE ALSO:

    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

New Field in Language API Training Status Response

The response JSON for an Einstein Language API call that returns the model training status contains a new field: the `globalResourceDownloadTime` field. This field is returned when the `modelType` is `text-intent`, or `text-sentiment`.

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: The new field appears in the response for this call: Get training status—GET `/v2/language/train/<MODEL_ID>`

SEE ALSO:

    Einstein Platform Services Developer Guide: Get Training Status

Salesforce Functions: Extend Salesforce with Functions (Beta)

Salesforce Functions lets developer extend Salesforce with custom, elastically scalable business logic built with high-productivity programming languages and open-source components. Salesforce Functions reduces your infrastructure responsibilities, enabling you to build and integrate Functions-as-a-Service (FaaS) apps using the languages and tools of your choice.

Where:

> 📝 Note: As a beta feature, Salesforce Functions 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 Salesforce Functions in the Salesforce Functions Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, Unlimited, and Developer editions.

When: The Salesforce Functions beta is planning to open after the release of Salesforce Spring '21. Look for further announcements and details on developer.salesforce.com and in the Salesforce Functions Trailblazer Community.

Why: A Function is your code, run on demand, in the Salesforce Functions trusted compute cloud. Run complex business logic code, written using your preferred languages and frameworks. Salesforce Functions are fully managed by the Salesforce Platform, which takes care of everything else necessary to invoke your code in a secure, multi-tenant aware, and auto-scaling environment.

How: Write JavaScript or TypeScript code that uses the Salesforce Functions Node SDK to communicate with your org. Deploy your Function in the Salesforce Functions compute cloud with the Salesforce CLI. Then, invoke your Function using Apex, and the Salesforce Functions infrastructure authenticates and runs your Function on demand.

Visualforce

An ongoing release update prevents consecutive API navigation calls in Visualforce pages. A new release update provides increased security when calling the Visualforce Remoting API. Both release updates are enforced in Winter '22.

IN THIS SECTION:

Securely Call the Visualforce Remoting API (Update)

The Visualforce Remoting API uses JavaScript to call methods in Apex controllers directly from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update is enforced in 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. This update was first made available in Summer '20.

Securely Call the Visualforce Remoting API (Update)

The Visualforce Remoting API uses JavaScript to call methods in Apex controllers directly from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update is enforced in Winter '22.

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

When: This update is available starting Spring '21 and is enforced in production orgs in Winter '22. This update is enforced in sandbox orgs 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: To improve security of the Visualforce JavaScript Remoting API, this update modifies how the CSRF token is created for the Visualforce `$RemoteAction` global variable. This validation adds more protection to API remoting calls by guest users. Also, this update validates the `{"apexType": "Object"}` parameter used by the Visualforce `$RemoteAction` global variable against the Apex method parameter and throws an error if the `apexType` parameter is invalid. This validation prevents users from providing Apex objects they can't access or providing Apex objects that don't satisfy the Apex method parameter.

How: We recommend performing these testing steps in a sandbox environment to evaluate the release update's impact and fix any validation errors before it's auto-enabled in Winter '22.

1. To find all Visualforce Remoting API usage, search your application code.

   The Remoting API invokes Apex controller methods with a `@RemoteAction` annotation. The Apex controller methods use this signature:

   ```
   @RemoteAction
   global static String myMethod(String inputArgument) { ... }
   ```

   The Visualforce pages use this JavaScript to invoke the Apex controller methods:

   ```
   Visualforce.remoting.Manager.invokeAction(
     '{!$RemoteAction.MyController.myMethod}',
     myArgument,
     function(result, event){...}
     ...
   ```

2. From Setup, in the Quick Find box, enter *Release Updates*, then select **Release Updates**. For Enable Visualforce JavaScript Remoting Enforcement, follow the testing steps, but don't activate the release update yet.

3. To see which Visualforce Remoting API calls fail validation, enable the release update test run. Manually test any page that uses remoting and watch for any exceptions and failed validations in the console log.

4. Review each validation failure and take steps to correct the Visualforce Remoting API usage in your code.

   The error messages identify how the validation is failing and how to fix the issue. For example, if an error message says that the `apexType` value doesn't satisfy the Apex method argument type, change the `apexType` value to the correct type.

5. Sometimes more complex features that don't have a simple resolution require you to redesign parts of your application.. See Declaring a Remote Method with Interface Parameters for details.

   For example, if an `apexType` value isn't accessible, you must redesign the Visualforce Remoting API usage so that you don't use the invalid `apexType` value.

6. When manual testing is complete, disable the release update test run, and transfer the code changes to your production org.

7. In your production org, enable the release update, or wait for it to auto-enable in Winter '22.

> 📝 **Note:** Any code changes you make as part of your testing are valid whether you enable the release update right away or wait for it to auto-enable.

SEE ALSO:

Release Updates

Prevent Consecutive API Navigation Calls in Visualforce Pages (Previously Released Update)

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. This update was first made available in Summer '20.

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

Apex

The Transaction Finalizers feature is now in beta and supports packaging. Use BatchApexErrorEvent triggers to monitor ISV applications. The Custom Property Editor feature for Invocable Actions is now generally available. Free Platform Cache is available in Developer edition orgs for ISVs. Use the callout annotation attribute for invocable actions that perform callouts. Query cursors are greatly optimized for improved performance.

For more information on these enhancements, refer to the Apex Developer Guide.

IN THIS SECTION:

Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Beta)
With Spring '21, the Transaction Finalizers feature is in beta. A new limit establishes that a Queueable job that failed due to an unhandled exception can only be successively re-enqueued five times by a Transaction Finalizer. This limit applies to a series of consecutive Queueable job failures. The counter is reset when the Queueable job completes without an unhandled exception. Finalizers can be implemented as an inner class. Also, you can implement both Queueable and Finalizer interfaces with the same class.

Use BatchApexErrorEvent Triggers to Monitor ISV Applications
Include BatchApexErrorEvent triggers in your managed package to monitor the health of batch jobs and take necessary corrective action without any post-installation steps.

Create Custom Property Editors for Invocable Actions (Generally Available)

Create a custom property editor that makes it a snap for an admin to configure a custom invocable action in Flow Builder. The custom property editor is simply a Lightning web component. This feature, now generally available, includes some changes since the beta release. Packaging and change sets are now supported for flows that include custom property editors for invocable actions.

Free Platform Cache for Managed Packages (Generally Available)

Salesforce provides 3 MB of free Platform Cache capacity for AppExchange-certified and security-reviewed managed packages. This feature is made available through a capacity type called Provider Free capacity and is automatically enabled in Developer Edition orgs.

Flag Invocable Apex Methods That Make Callouts

For invocable actions that perform callouts, you can now add a callout attribute to the invocable Apex method annotation. With this information, a flow calling the action knows how to manage the transaction at run time.

Query Cursors Optimized for Improved Performance

Apex optimized the way it uses query cursors. In cases such as SOQL queries that use a `for` loop, Apex no longer generates or uses query cursors internally. Instead, records are buffered in memory for improved performance and reduced query cursor contention. This optimization doesn't apply to Batch Apex queries.

Convert Leads to a Person Account and a Business Account at the Same Time with New LeadConvert Methods

If your customers include individuals and groups, your sales teams can associate converted leads with a person account and a business account simultaneously. For example, a bank can create person accounts for each member of a family and group the family into a business account.

Named Credential Callouts in Anonymous Blocks Require Customize Application Permission

If you use a named credential to specify a callout's endpoint in an Apex anonymous block, you must have the Customize Application permission.

SEE ALSO:

Apex: New and Changed Items

Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Beta)

With Spring '21, the Transaction Finalizers feature is in beta. A new limit establishes that a Queueable job that failed due to an unhandled exception can only be successively re-enqueued five times by a Transaction Finalizer. This limit applies to a series of consecutive Queueable job failures. The counter is reset when the Queueable job completes without an unhandled exception. Finalizers can be implemented as an inner class. Also, you can implement both Queueable and Finalizer interfaces with the same class.

Where: This change applies to Lightning Experience and Salesforce Classic. To use this beta feature, it isn't necessary to enable the 'Transaction Finalizers' feature in scratch orgs. The Transaction Finalizers feature isn't restricted to scratch orgs, can be used in production orgs and sandboxes, and can be included in managed packages.

🗹 Note: As a beta feature, Transaction Finalizers 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 TransactionFinalizers group in the Trailblazer Community.

How: The `System.FinalizerContext` interface contains four methods.

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- `getAsyncApexJobId` method: Returns the ID of the Queueable job for which this finalizer is defined.
- `getRequestId` method: Returns the request ID shared by both the finalizer execution and the Queueable job to which the finalizer is attached. This shared ID helps in filtering logs of a Queueable job and its attached finalizer.
- `getResult` method: Returns the `System.ParentJobResult` enum, which represents the result of the parent asynchronous Apex Queueable job to which the finalizer is attached. Valid values for the enum are `SUCCESS`, and `UNHANDLED_EXCEPTION`.
- `getException` method: Returns the exception with which the Queueable job failed when `getResult` is `UNHANDLED_EXCEPTION`, null otherwise.

To attach actions to your Queueable jobs, you must implement the FinalizerContext interface. Only one finalizer instance can be attached to any Queueable job. You can enqueue a single asynchronous Apex job (Queueable, future, or batch) in the finalizer's implementation of the `execute` method. Callouts are allowed in finalizer implementations.

For more information on implementing Transaction Finalizers, including examples, see Transaction Finalizers (Beta) in *Apex Developer Guide*.

Use BatchApexErrorEvent Triggers to Monitor ISV Applications

Include BatchApexErrorEvent triggers in your managed package to monitor the health of batch jobs and take necessary corrective action without any post-installation steps.

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

How: The BatchApexErrorEvent object represents a platform event associated with a failing batch Apex execution. To fire this platform event, a batch Apex class declaration must implement the `Database.RaisesPlatformEvents` interface. A `BatchApexErrorEvent` platform event is fired when a batch Apex job encounters an unhandled exception. For more details, see Firing Platform Events from Batch Apex in the *Apex Developer Guide*.

Create Custom Property Editors for Invocable Actions (Generally Available)

Create a custom property editor that makes it a snap for an admin to configure a custom invocable action in Flow Builder. The custom property editor is simply a Lightning web component. This feature, now generally available, includes some changes since the beta release. Packaging and change sets are now supported for flows that include custom property editors for invocable actions.

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 Invocable Actions in Flow Builder More Easily with Custom Property Editors (Generally Available)

Free Platform Cache for Managed Packages (Generally Available)

Salesforce provides 3 MB of free Platform Cache capacity for AppExchange-certified and security-reviewed managed packages. This feature is made available through a capacity type called Provider Free capacity and is automatically enabled in Developer Edition orgs.

Where: 3 MB of free Platform Cache is available in Developer Edition.

How: Allocate the Provider Free capacity to a Platform Cache partition and add it to your managed package. When the AppExchange-certified, security-reviewed managed package is installed on the subscriber org, the Provider Free capacity is allocated and automatically made available to the installed platform cache partition. The managed package can then start using the Platform Cache partition.

Provider Free capacity is available with first-generation and second-generation packaging. For second-generation packaging, to create a scratch org with Provider Free capacity, see the ProviderFreePlatformCache feature.

📝 Note: If the managed package isn't AppExchange-certified and security-reviewed, the Provider Free capacity resets to zero on package installation.

SEE ALSO:

Salesforce Online Help: Set Up a Platform Cache Partition with Provider Free Capacity (can be outdated or unavailable during release preview)

Flag Invocable Apex Methods That Make Callouts

For invocable actions that perform callouts, you can now add a callout attribute to the invocable Apex method annotation. With this information, a flow calling the action knows how to manage the transaction at run time.

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

How: To flag callouts in Apex methods annotated with `@InvocableMethod`, add the `callout` attribute to the annotation and set it to `true`.

```
@InvocableMethod(callout=true, label="My Action Label")
```

If your action makes a callout, set the `callout` attribute to `true`. If the action is executed by a flow, at run time the flow determines how to successfully execute the action, in a new transaction or in the currently running transaction.

If the callout attribute is set to `false`, the action is flagged to safely perform in the transaction regardless of whether the transaction has uncommitted work.

SEE ALSO:

Avoid Callout Errors in Screen Flows Automatically

Query Cursors Optimized for Improved Performance

Apex optimized the way it uses query cursors. In cases such as SOQL queries that use a `for` loop, Apex no longer generates or uses query cursors internally. Instead, records are buffered in memory for improved performance and reduced query cursor contention. This optimization doesn't apply to Batch Apex queries.

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

Convert Leads to a Person Account and a Business Account at the Same Time with New LeadConvert Methods

If your customers include individuals and groups, your sales teams can associate converted leads with a person account and a business account simultaneously. For example, a bank can create person accounts for each member of a family and group the family into a business account.

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

How: For Salesforce orgs that use APEX Lead Convert, Person Accounts, and Contacts to Multiple Accounts, new methods are available on the LeadConvert class. The `getRelatedPersonAccountId()`, `setRelatedPersonAccountId()`, `getRelatedPersonAccountRecord()`, and `setRelatedPersonAccountRecord()` methods allow converting leads into a business account and a person account instead of a contact.

The new `getRelatedPersonAccountId()` method in the `LeadConvertResult` class returns the ID of the new or existing related person account.

Named Credential Callouts in Anonymous Blocks Require Customize Application Permission

If you use a named credential to specify a callout's endpoint in an Apex anonymous block, you must have the Customize Application permission.

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

Why: This change aligns the user permission requirements of Apex developers and admins who work with named credentials. Admins who edit named credentials in Setup have always needed the Customize Application user permission.

SEE ALSO:

> *Apex Developer Guide*: Anonymous Blocks
>
> *Apex Developer Guide*: Named Credentials as Callout Endpoints

API

API version 51.0 features a pilot to generate an OpenAPI 3.0 specification. Some legacy versions of the APIs will be retired in the Summer '21 release.

IN THIS SECTION:

OpenAPI 3.0 Specification (Pilot)

Have you ever wanted to generate an OpenAPI 3.0 specification for the Lightning Platform REST API? Do you want to use that specification to quickly set up integrations with Salesforce? Would you like a single of source truth for all Salesforce REST resources? With this pilot, you can now generate an OpenAPI 3.0 specification that describes the four most commonly used sObject resources. The generated specification reflects your org's unique endpoints and object customizations.

Advance Notice of Upcoming Retirement of Platform API Legacy Versions

With the Summer '21 release, legacy versions of the Salesforce Platform API will be retired and will no longer be supported by Salesforce.

OpenAPI 3.0 Specification (Pilot)

Have you ever wanted to generate an OpenAPI 3.0 specification for the Lightning Platform REST API? Do you want to use that specification to quickly set up integrations with Salesforce? Would you like a single of source truth for all Salesforce REST resources? With this pilot, you can now generate an OpenAPI 3.0 specification that describes the four most commonly used sObject resources. The generated specification reflects your org's unique endpoints and object customizations.

Where: As a pilot, The OpenAPI 3.0 specification in this pilot must only be used for calls made against a Developer Edition (DE) org or a Sandbox environment.

> **Note:** We provide this feature 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. This 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.

Why: In the same way that WSDL generation makes SOAP-based connectivity simple and tailored to your org, the OpenAPI specification simplifies exploring REST API and delivering REST-based integrations and apps. The specification can be easily consumed in an API client like Postman, accelerating time-to-market for an API-driven solution.

How: You can generate the specification by making one REST API call to an endpoint for your org. To learn more about this pilot, contact your Salesforce Account Executive or open a support case.

Advance Notice of Upcoming Retirement of Platform API Legacy Versions

With the Summer '21 release, legacy versions of the Salesforce Platform API will be retired and will no longer be supported by Salesforce.

Where: The following API versions will be retired and will no longer be supported by Salesforce:

SOAP API
> 7.0, 8.0, 9.0, 10.0, 11.0, 11.1, 12.0, 13.0, 14.0, 15.0, 16.0, 17.0, 18.0, 19.0, 20.0

REST API
> 20.0

Bulk API
> 16.0, 17.0, 18.0, 19.0, 20.0

This change applies to Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions.

When: Customers can continue to use these legacy API versions until Summer '21 is released, at which time these legacy versions will become unavailable. When these legacy versions are retired, applications consuming these of the APIs will experience disruption. The requests will fail with an error message indicating that the requested endpoint has been deactivated.

Who: This retirement affects all API-enabled org editions and applies to both Salesforce Classic and Lightning Experience.

Why: We are focusing our development efforts on enhancing the latest API versions to improve the overall Salesforce experience when building custom functionality via applications.

How: Before the Summer '21 release, customers must modify or upgrade their applications to function with the most current API versions available. Newer versions of our APIs offer advanced capabilities with improved security and performance.

For more information, see Knowledge Article Number 000351312.

Packaging

Test upcoming features in your packages by specifying the release version of the package. Try org-dependent packages, now generally available, to help you use unlocked packages when your org metadata is difficult to untangle. Secure the subscriber support console in your License Management Org using multi-factor authentication. Monitor packaging operations with new API fields.

IN THIS SECTION:

Target a Specific Release for Your Packages During Salesforce Release Transitions

During major Salesforce release transitions, you can specify `preview` or `previous` when creating a package version. Specifying the release version for a package allows you to test upcoming features, run regression tests, and support customers regardless of which Salesforce release their org is on. Previously, you could only create package versions that matched the Salesforce release your Dev Hub org was on.

Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages (Generally Available)

Org-dependent unlocked packages, a variation of unlocked packages, allow you to create packages that depend on unpackaged metadata in the installation org. When untangling your production org metadata is too daunting of a task, use org-dependent unlocked packages. When you use org-dependent unlocked packages, metadata validation occurs during package installation, instead of during package version creation.

Target a Specific Release for Your Packages During Salesforce Release Transitions

During major Salesforce release transitions, you can specify `preview` or `previous` when creating a package version. Specifying the release version for a package allows you to test upcoming features, run regression tests, and support customers regardless of which Salesforce release their org is on. Previously, you could only create package versions that matched the Salesforce release your Dev Hub org was on.

Where: This change applies to unlocked and second-generation managed packages.

When: After your Dev Hub org is updated to the Spring '21 release, you can create packages with the release version set to `previous`.

Starting in the Summer '21 release transition, you can specify `preview` or `previous` as the release version.

How: To create a package version based on the previous Salesforce release version, create a scratch definition file that contains:

```
{
    "release": "previous"
}
```

Next, specify the definition file when you create your package version.

```
sfdx force:package:version:create -f config/project-scratch-def.json
```

Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages (Generally Available)

Org-dependent unlocked packages, a variation of unlocked packages, allow you to create packages that depend on unpackaged metadata in the installation org. When untangling your production org metadata is too daunting of a task, use org-dependent unlocked packages. When you use org-dependent unlocked packages, metadata validation occurs during package installation, instead of during package version creation.

Where: This change applies to unlocked packages created using Salesforce CLI.

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

Why: Longstanding and large production orgs often accumulate large amounts of metadata that are difficult to modularize when adopting a package-based Application Lifecycle Management (ALM) approach. With org-dependent unlocked packages, customers with large and complex orgs can now use unlocked packages without being required to resolve all their metadata dependencies.

> 📝 Note: Org-dependent unlocked packages are a variation of unlocked packages and not a separate package type. They follow the same package development steps and use the same supported metadata types as unlocked packages.

How: To enable packaging, first enable Dev Hub. From Setup, in the Quick Find box, enter `Dev Hub`, and select **Dev Hub**. Next, select **Enable Dev Hub**, and then select **Enable Unlocked Packages and Second-Generation Managed Packages**.

Use the `orgdependent` CLI parameter on the `package:create` CLI command.

To develop your org-dependent unlocked package, consider using Source Tracking in Sandboxes.

SEE ALSO:

Salesforce DX Developer Guide: Create Org-Dependent Unlocked Packages

Remove Metadata Components from Second-Generation Managed Packages (Pilot)

Remove public Apex classes and metadata components that you no longer want in your second-generation managed packages. In Spring '21, we're piloting this feature with a specific set of metadata components. Join this pilot and help us test this feature.

Where: This change applies to second-generation managed packages.

We provide Remove Metadata Components from 2GP 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 Remove Metadata Components from 2GP in the Managed Packages group in the Partner Community.

Why: Pilot participants can remove these metadata components from second-generation managed packages.

- Apex Class (excluding global Apex classes)
- Apex Trigger
- Compact Layout
- Custom Application
- Custom Field
- Custom Object
- Custom Tab
- Field Set
- Layout
- Lightning Application
- Lightning Component
- List View
- Permission set
- Quick Action
- Record Type
- Sharing Reason
- Static Resource

- Validation Rule
- Visualforce Component
- Visualforce Page
- WebLink (Custom Button or Custom Link)

How: To join the pilot, log a case at https://partners.salesforce.com/partnerSupport.

After the pilot is enabled, remove the metadata component's source file from your Salesforce DX project, and create a new package version.

Monitor Packaging Operations with New API Fields

Three new fields in SOAP and Tooling API objects allow you to monitor and troubleshoot issues with push upgrades and package creation. The PackagePushRequest and the PackagePushJob objects in SOAP API have new fields that indicate the start time, end time, and how long the push upgrade took to complete. The Package2Version object in Tooling API has a new field that indicates how long it took to create a package version. You can also use `--verbose` on `package:version:list` or `package:version:report` to view `BuildDurationInSeconds` for a package version.

Where: These changes apply to unlocked and second-generation managed packages. The push upgrade start and end times are also available to first-generation managed packages.

Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update)

Secure access to subscriber orgs by requiring multi-factor authentication (MFA) when logging into the License Management Org (LMO).

Where: This change applies to the License Management Orgs used to support first- and second-generation managed packages.

When: Salesforce enforces this update in Spring '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: This change provides subscribers who need assistance with their managed packages an extra layer of security by verifying the identity of the user accessing their org. It also provides you more control and accountability over which users log into a subscriber org.

How: If the License Management Org session hasn't been established using multi-factor authentication, this update blocks attempts to access the Subscriber Support Console.

To test and apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**. Locate Require Multi-Factor Authentication For Logins to Subscriber Orgs, and follow the testing and activation steps.

SEE ALSO:

> *ISVforce Guide*: Log In to Subscriber Orgs
>
> Release Updates

Specify Unpackaged Metadata for Package Version Creation Tests (Generally Available)

Sometimes you require metadata that you don't need in your package, but it's necessary for Apex test runs during package version creation. In these cases, 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.

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

How: 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.

```
"packageDirectories": [
    {
        "path": "force-app",
        "package": "TV_unl",
        "versionName": "ver 0.1",
        "versionNumber": "0.1.0.NEXT",
        "default": true,
        "unpackagedMetadata": {
            "path": "my-unpackaged-directory"
        }
    },
    {
        "path": "my-unpackaged-directory",
        "default": false
    }
]
```

SEE ALSO:

Salesforce DX Developer Guide: Specify Unpackaged Metadata for Package Version Creation Tests

Scratch Orgs

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many purposes. We continually add support for new configurable features.

IN THIS SECTION:

Create Scratch Orgs with More Features

With these new features for scratch orgs you have more options for the shape of your scratch org.

Install and Use the B2B Commerce for Visualforce More Easily in a Scratch Org

Get started with the B2B Commerce for Visualforce managed package in a scratch org more quickly. Enabling the `B2BCommerce` feature in a scratch org now adds the B2B Commerce permission set license to the org by default. This permission set license is required for all admin users who want to access the CC Admin tab in B2B Commerce for Visualforce. This change makes it easier to install and start using B2B Commerce for Visualforce alongside other scratch org features, including B2B Commerce for Lightning Experience.

Create Scratch Orgs with More Features

With these new features for scratch orgs you have more options for the shape of your scratch org.

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.

- AddCustomFields:<value>
- AdmissionsConnectUser
- AIReplyRecommendations

- AnalyticsAppEmbedded
- CallCoaching
- CampaignInfluence2
- CoachingManagerGroupAccess
- CustomerAssetLifecycleManagement
- CustomerExperienceAnalytics
- CustomFieldDataTranslation
- DecisionTable
- EinsteinAnalyticsForB2BMarketing
- EinsteinSearch
- EnableSetPasswordInApi
- ERMAnalytics
- FinanceLogging
- GoalManagerGroupAccess
- IndustriesCompliantDataSharing
- ManufacturingAnalytics
- MyTrailhead
- OrderManagement
- OrderSaveBehaviorBoth
- OrderSaveLogicEnabled
- PardotEinstein
- PublicSector
- SalesCadenceFolderSharing
- Walkthroughs
- WorkPerform
- WorkplaceCommandCenterUser

Changed Scratch Org Features

PlatformConnect requires a quantity from 1 through 5.

```
PlatformConnect:<value>
```

The ContactsToMultipleAccounts feature was planned for deprecation this release. That is no longer correct. The feature will continue to be available.

SEE ALSO:

Salesforce DX Developer Guide: Scratch Org Features

Install and Use the B2B Commerce for Visualforce More Easily in a Scratch Org

Get started with the B2B Commerce for Visualforce managed package in a scratch org more quickly. Enabling the `B2BCommerce` feature in a scratch org now adds the B2B Commerce permission set license to the org by default. This permission set license is required for all admin users who want to access the CC Admin tab in B2B Commerce for Visualforce. This change makes it easier to install and start using B2B Commerce for Visualforce alongside other scratch org features, including B2B Commerce for Lightning Experience.

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

Why: Previously, enabling the `B2BCommerce` feature in a scratch org added only the license required for B2B Commerce for Lightning Experience. Admins could install the B2B Commerce for Visualforce managed package, but they couldn't access the CC Admin tab.

How: After you add the `B2BCommerce` feature to your scratch org definition file and the scratch org is created, enable the B2B Commerce permission set license and apply it to the admin users that you want to access the CC Admin tab.

> **Note:** This permission set license is available only in scratch orgs created after March 25, 2021.

SEE ALSO:

Salesforce Help: Install B2B Commerce for Visualforce

Salesforce DX Developer Guide: Scratch Org Features

Sandboxes

Mask your data in less time, gain more control over your masking configuration, or incrementally mask only newly added data. See a list of changes between your local project and org with source tracking.

IN THIS SECTION:

Fine-Tune Your Data Security with Data Mask

Mask your data in less time, gain more control over your masking configuration, or incrementally mask only newly added data. Enhanced Data Mask features give you powerful new ways to secure all your sensitive data. Use Data Mask to automatically mask the data in a sandbox.

Track Changes Between Your Local Project and a Sandbox (Generally Available)

As you develop on the Salesforce DX platform, run source tracking to see a list of components you create, update, or delete between your local project and a Salesforce sandbox.

Fine-Tune Your Data Security with Data Mask

Mask your data in less time, gain more control over your masking configuration, or incrementally mask only newly added data. Enhanced Data Mask features give you powerful new ways to secure all your sensitive data. Use Data Mask to automatically mask the data in a sandbox.

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

Who: Users with the System Administrator profile can install or update Data Mask.

Why:

You can target data records to mask by setting up record filtering rules on specific fields.

Also, Data Mask now supports eight languages:

- Brazilian

- Portuguese

- Dutch

- French

- German

- Italian

- Japanese

- Mexico Spanish

- Spain Spanish

How: Data Mask is a managed package that you install and execute in a production org. You then run the masking process in any sandbox created from the production org.

SEE ALSO:

Salesforce Help: Set Filter Criteria

Track Changes Between Your Local Project and a Sandbox (Generally Available)

As you develop on the Salesforce DX platform, run source tracking to see a list of components you create, update, or delete between your local project and a Salesforce sandbox.

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

Why: In addition to listing the changes you make, source tracking makes it possible to:

- Automatically track changes to metadata components, saving you from tracking them manually.

- See changes pushed to a sandbox by other developers.

- Push or pull changed source.

- Identify and resolve conflicts between your local project and the sandbox prior to pushing or pulling source.

How: These examples use Salesforce CLI commands. From a terminal or command window, navigate to the project directory for which you want to see changes. In this example, the directory is named MyProject.

```
cd MyProject
```

To see changes between your local project and the sandbox, run the force:source:status command. Include the -u parameter to specify the username of the sandbox that you want to compare with your local project. In this example, the username is DevSandbox.

```
sfdx force:source:status -u DevSandbox
```

The CLI displays the differences between the local project and the sandbox. In this example, the local project includes an Apex class named WidgetClass. The sandbox includes changes to a custom object named Widget__c that haven't been pulled to the local project, but which conflict with Widget__c in the local project. In this example, someone working in the sandbox also deletes a listview called All on Widget__c and includes a permission set named WidgetPermissions. Pushing source to the sandbox adds the WidgetClass ApexClass. Pulling source from the sandbox changes Widget__c, deletes the All listview on Widget__c, and creates a permission set named WidgetPermissions in the local project.

```
=== Source Status
STATE                    FULL NAME      TYPE         PROJECT PATH
_____          _____     _____
_____
Local  Add               WidgetClass    ApexClass    /WidgetClass.cls-meta.xml
```

```
Local  Add                 WidgetClass      ApexClass   /WidgetClass.cls
Remote Changed (Conflict) Widget__c .       CustomObject
force-app/main/default/objects/Widget__c/Widget__c.object-meta.xml
Remote Deleted            Widget__c.all     ListView .
force-app/main/default/objects/Widget__c/listViews/All.listView-meta.xml
Remote Add                WidgetPermissions PermissionSet
```

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.

IN THIS SECTION:

[Develop Customer 360 Platform Apps with Ease](#)
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.

SEE ALSO:

Salesforce Extensions for Visual Studio Code
Salesforce CLI Command Reference

Develop Customer 360 Platform Apps with Ease

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.

Lightning Design System

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 focused on expanding the support for styling hooks.

We frequently update the existing component behavior 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 also rolled up into the next major Salesforce release. Here are some highlights for Spring '21.

IN THIS SECTION:

[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.

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, and announced again in the Winter '21 release notes.

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.

Lightning Design System Styling Hooks (Beta) were introduced in Winter '21 for some component blueprints. This release adds styling hooks to these additional component blueprints.

- Cards
- Checkbox
- Checkbox toggle
- Input
- Radio Group
- Select
- Slider
- Textarea

The Blueprint Overview shows which components have styling hooks. Click the components to view their blueprints and available styling hooks.

Improve your UI with these recent updates to SLDS component blueprints.

Accordion

Updated the heading button to take up all available space, allowing for a larger hit target to toggle the accordion functionality.

Added styling hooks to set colors in accordion headings.

Alert

Updated styling hook name for warning text color.

Removed component level styling hooks for status states.

Updated markup to function with or without theme utility classes.

Buttons

Added styling hooks for shadows.

Added variant-specific styling hooks for spacing.

Removed styling hook `--sds-c-button-inverse-color-border-focus`.

Removed component-level styling hooks for disabled states, which are now handled at the global level.

Form Element

Adjusted space between the form label and the information button icon for mobile viewports.

Icons

Removed hooks for modifying the status states of icons at the component level.

Modals

Added styling hooks for text color of the content, header, and footer.

Added styling hooks for background color of the content, header, footer, and backdrop.

Updated incorrect styling hooks on heading.

Pills

Updated styling hook names for focus state. The suffix is now `-focus` instead of `-active`.

Scoped Tabs

Removed variant-specific styling hooks for scoped tabs.

Spinners

Added demo `background-color` to the with-container and fixed-container examples.

Tabs

Removed white `background-color` from `.slds-tabs_default` to expose the surface color of the tabs parent container.

Added styling hooks for sizing, spacing, line height, and text color.

Toast

Added styling hook for text color.

Visual Picker

Updated checkmark vertical positioning.

AppExchange Partners

Gain new insights into your subscribers' Apex custom code usage with AppExchange App Analytics. Submit your solution for security review, track progress, and view history in the redesigned AppExchange security review interface.

IN THIS SECTION:

Analyze Your Apex Custom Code with AppExchange App Analytics

Discover how your subscribers interact with your solution's Apex code with AppExchange App Analytics package usage logs and package usage summaries. As part of your customer-focused strategy, Apex event and exception data can help you drive feature development decisions and improve your subscriber experience.

Submit Your Solution Faster and Track Progress with the Redesigned AppExchange Security Review

The redesigned AppExchange security review interface adds support for more solution types, such as Salesforce B2C Commerce and Quip apps. Check the review progress component to see your remaining tasks, review status, and Product Security requests.

Update Your AppExchange Payment Information Quickly

To change your payment method for AppExchange security review and annual listing fees, click the Update Payment button on your listing. This feature makes it easier for you to change the payment information that's on file for your AppExchange listings.

Analyze Your Apex Custom Code with AppExchange App Analytics

Discover how your subscribers interact with your solution's Apex code with AppExchange App Analytics package usage logs and package usage summaries. As part of your customer-focused strategy, Apex event and exception data can help you drive feature development decisions and improve your subscriber experience.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition.

Who: AppExchange App Analytics is available only for managed packages that have passed security review.

How: To activate AppExchange App Analytics, log a new case with Salesforce Partner Community Support. Log in to the Partner Community, select **Support**, and then click **New Case**. Select **Other AppExchange Topics | Create a Case**. Then select **Enable App Analytics** from the picklist.

SEE ALSO:

AppExchange App Analytics

Submit Your Solution Faster and Track Progress with the Redesigned AppExchange Security Review

The redesigned AppExchange security review interface adds support for more solution types, such as Salesforce B2C Commerce and Quip apps. Check the review progress component to see your remaining tasks, review status, and Product Security requests.

Where: The redesigned interface is available in the Salesforce Partner Community Publishing Console.

Who: AppExchange partners with Manage Listings permission can use this feature.

Why: The new flow introduces a streamlined security review submission process for AppExchange partners. There's increased tech awareness with support for Lightning Platform, API-only, B2C and B2B Commerce, and Quip app types.

A progress component consolidates key info. Check your remaining submission tasks, track your review's post-submission status, and see Product Security requests—all in one place.

How: Log in to the Salesforce Partner Community, click Publishing, find and open your AppExchange listing, then navigate to the Security Review tab.

Update Your AppExchange Payment Information Quickly

To change your payment method for AppExchange security review and annual listing fees, click the Update Payment button on your listing. This feature makes it easier for you to change the payment information that's on file for your AppExchange listings.

Who: AppExchange partners with Manage Listings permission can access this feature on their AppExchange listings that have active subscriptions.

How: Log in to the Salesforce Partner Community, and click Publishing. Find and open your AppExchange listing. Then navigate to the Security Review tab, and click Update Payment.
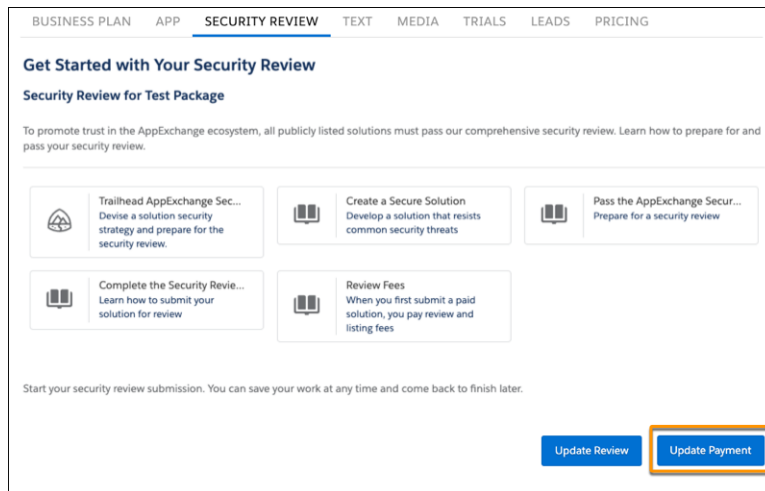
Change Data Capture

Enrich your event messages with fields and receive change notifications for more objects.

IN THIS SECTION:

Enrich Change Event Messages with Extra Fields (Generally Available)

Event enrichment enables you to include unchanged fields in change events to facilitate data processing and replication. You can select any field whose type is supported. For example, use enrichment when your app needs an external ID field for matching records in an external system. Or always include a field that provides important information about the changed record. Event enrichment is supported in CometD-based subscribers only. We offered event enrichment as a pilot in previous releases and it is now generally available.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the VideoCall and VideoCallRecording objects.

Enrich Change Event Messages with Extra Fields (Generally Available)

Event enrichment enables you to include unchanged fields in change events to facilitate data processing and replication. You can select any field whose type is supported. For example, use enrichment when your app needs an external ID field for matching records in an external system. Or always include a field that provides important information about the changed record. Event enrichment is supported in CometD-based subscribers only. We offered event enrichment as a pilot in previous releases and it is now generally available.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

How: You define enrichment fields for a channel and a member of that channel, which references an object selected for Change Data Capture. The channel can be 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`). To configure the enriched fields with Tooling API, make a POST REST request to `/services/data/v51.0/tooling/sobjects/PlatformEventChannelMember`.

Request Body:

```
{
  "FullName": "SalesEvents_AccountChangeEvent",
  "Metadata": {
    "enrichedFields": [
      {
        "name": "External_Account_ID__c"
      },
      {
        "name": "Industry"
      }
    ],
    "eventChannel": "SalesEvents__chn",
    "selectedEntity": "AccountChangeEvent"
  }
}
```

SEE ALSO:

Change Data Capture Developer Guide: Enrich Change Events With Extra Fields When Subscribed with CometD

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the VideoCall and VideoCallRecording objects.

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

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. These are the new objects that now support Change Data Capture.

- LoyaltyLedger
- TransactionJournal

Platform Events

Configure a platform event trigger to override the default user and batch size.

IN THIS SECTION:

Configure the User and Batch Size for Your Platform Event Trigger

You can override the default running user and batch size of a platform event Apex trigger. By default, the trigger runs as the Automated Process system user with a batch size of 2,000 event messages. Configuring the user and batch size enables you to bypass some limitations that sometimes arise from using the defaults. For example, record system and `OwnerId` fields are populated as the specified user. And setting a batch size smaller than 2,000 can help avoid hitting Apex governor limits.

Standard-Volume Platform Events Are Now Published Asynchronously

Previously, standard-volume events were published synchronously, which means when the SaveResult returns a success value of true, the event was published successfully. Now, getting a successful result back means that the event publishing is enqueued. The system attempts the publishing later, similar to high-volume platform events.

Configure the User and Batch Size for Your Platform Event Trigger

You can override the default running user and batch size of a platform event Apex trigger. By default, the trigger runs as the Automated Process system user with a batch size of 2,000 event messages. Configuring the user and batch size enables you to bypass some limitations that sometimes arise from using the defaults. For example, record system and `OwnerId` fields are populated as the specified user. And setting a batch size smaller than 2,000 can help avoid hitting Apex governor limits.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

How: Configure a platform event trigger using PlatformEventSubscriberConfig in Metadata API or Tooling API.

This example shows the configuration of OrderEventTrigger using Metadata API. The user is set to `user@example.com` and the batch size is `200`.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<PlatformEventSubscriberConfig xmlns="http://soap.sforce.com/2006/04/metadata">
    <platformEventConsumer>OrderEventTrigger</platformEventConsumer>
    <batchSize>200</batchSize>
    <masterLabel>OrderEventTriggerConfig</masterLabel>
    <user>user@example.com</user>
    <isProtected>false</isProtected>
</PlatformEventSubscriberConfig>
```

SEE ALSO:

Platform Events Developer Guide: Configure the User and Batch Size for Your Platform Event Trigger

Metadata API Developer Guide: PlatformEventSubscriberConfig

Tooling API Developer Guide: PlatformEventSubscriberConfig

Standard-Volume Platform Events Are Now Published Asynchronously

Previously, standard-volume events were published synchronously, which means when the SaveResult returns a success value of true, the event was published successfully. Now, getting a successful result back means that the event publishing is enqueued. The system attempts the publishing later, similar to high-volume platform events.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

📝 Note: Since Spring '19, you can no longer define standard-volume platform events. You can still publish previously defined standard-volume platform events.

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. Do more with B2B Commerce for Lightning orders and wishlists. Some B2B Commerce for Lightning methods are available to guest users. Get CMS managed content using content keys.

[API: New and Changed Items](#)

Access more data objects and metadata types in API version 51.0.

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.

These base components are generally available.

- lightning-formatted-date-time
- lightning-formatted-number
- lightning-relative-date-time

Changed Lightning Web Components

These components have changed.

lightning-button
This attribute is new.

- `aria-haspopup`—Indicates for assistive technologies the type of popup element that is triggered by the button. Valid values include `true`, `dialog`, `menu`, `listbox`, `tree`, `grid`.

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lightning-button-menu

This event is new.

- `close`—The event fired when the dropdown menu is closed.

lightning-datatable

The following `typeAttribute` property is new for the currency and percent data types.

- `step`—Granularity of the value during inline editing, specified as a positive floating point number, such as `0.001`. Use `any` when granularity is not a concern. This value defaults to `0.01`.

lightning-formatted-phone

This attribute is new.

- `disabled`—Displays the phone number as plain text instead of a link. The number can't be clicked or receive focus.

lightning-formatted-url

This attribute has changed.

- `target`—In the Salesforce mobile app, the `_blank` target value now behaves similar to the `_self` target and opens the link inside the app when possible, instead of in a web browser.

lightning-icon

The component now lazy loads the SLDS icon you pass with the `icon-name` attribute, which improves the overall performance of this component. The generated markup of a component can change, so don't depend on it for custom styling and functional hooks. The delay in loading can impact your code if you query the icon's markup during initial rendering.

If you want to work with the component's internal markup, such as to add custom styling on an icon, use SLDS styling hooks. For example, to add a custom fill color on an icon, use the `--sds-c-icon-color-foreground` or `--sds-c-icon-color-foreground-default` CSS custom properties.

lightning-input

These attributes are new.

- `selection-start`—Specifies the index of the first character to select in the input element. This attribute is supported only for text type. Use with `selection-end` to programmatically select a string.

- `selection-end`—Specifies the index of the last character to select in the input element. This attribute is supported only for text type. Use with `selection-start` to programmatically select a string.

These attributes have changed.

- `label`—Supports hidden custom labels for assistive devices. Specify the `label` and `variant="label-hidden"` attributes, and use `aria-labelledby` to reference a label. The component doesn't render an HTML `<label>` element.

lightning-input-rich-text

When you insert a link, the popup's Link URL field is initially blank. Previously, the field was prefilled with the `https://` protocol. You must include a protocol in your link.

This attribute is new.

- `required`—Marks the text editor as requiring user input. To display an asterisk to indicate input is required, also specify `label-visible`. A default label displays after the asterisk. Wire up your own validation logic as the component doesn't validate for required input.

lightning-map

This attribute is new.

- `options`—Specifies boolean properties you can set to enable or disable controls on the map.
  - `draggable` enables dragging to pan the map. Default is true.
  - `zoomControl` enables zooming controls. Default is true.

- `scrollwheel` enables zooming with the mouse wheel. Default is true.
- `disableDefaultUI` disables zooming and choosing the map layer. Default is false.
- `disableDoubleClickZoom` disables zooming with a mouse double-click. Default is false.

These properties are new for the `map-markers` attribute.

- `type`—Defines colored shapes to mark a location. The available shape types are `Circle`, `Rectangle`, and `Polygon`.
- `radius`—Defines the size of a `Circle` type in meters.
- `bounds`—Defines the corners of a `Rectangle` type in coordinates for north, south, east, and west.
- `paths`—Defines the segments of a `Polygon` type in pairs of coordinates.
- `mapIcon`—Defines a custom SVG icon for a marker.
- `path`—Defines the SVG path for `mapIcon`.
- `scale`—Defines the scale for `mapIcon` for appropriate sizing.
- Styling properties for `type` and `mapIcon` include: `strokeColor`, `strokeOpacity`, `strokeWeight`, `fillColor`, and `fillOpacity`.

For more information, see Customize Markers and Control Map Behavior in lightning-map Base Component on page 506.

lightning-tree

This property of the `items` attribute has changed.

- `disabled`—A disabled tree item now displays in light text and can't receive focus. Previously, a disabled item appeared in normal text and could receive focus.

SEE ALSO:

Component Library

New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

Changed Module

This module has changed.

lightning/navigation

This pageReference type is new.

- `standard__managedContentPage`—Enables a component to use a pageReference to navigate to a specific CMS content page in an Experience Builder site.

New and Changed Aura Components

Build UI easily with these new and changed components.

These base components are generally available.

- lightning:formattedDateTime
- lightning:formattedNumber
- lightning:relativeDateTime

Changed Lightning Web Components

These components have changed.

lightning:datatable

The following `typeAttribute` property is new for the currency and percent data types.

- `step`—Granularity of the value during inline editing, specified as a positive floating point number, such as `0.001`. Use `any` when granularity is not a concern. This value defaults to `0.01`.

lightning:formattedPhone

This attribute is new.

- `disabled`—Displays the phone number as plain text instead of a link. The number can't be clicked or receive focus.

lightning:formattedUrl

This attribute has changed.

- `target`—In the Salesforce mobile app, the `_blank` target value now behaves similar to the `_self` target and opens the link inside the app when possible, instead of in a web browser.

lightning:icon

The component now lazy loads the SLDS icon you pass with the `iconName` attribute, which improves the overall performance of this component. The generated markup of a component can change, so don't depend on it for custom styling and functional hooks. The delay in loading can impact your code if you query the icon's markup during initial rendering.

lightning:input

These attributes are new.

- `selectionStart`—Specifies the index of the first character to select in the input element. This attribute is supported only for text type. Use with `selectionEnd` to programmatically select a string.

- `selectionEnd`—Specifies the index of the last character to select in the input element. This attribute is supported only for text type. Use with `selectionStart` to programmatically select a string.

This attribute has changed.

- `label`—Supports hidden custom labels for assistive devices. Specify the `label` and `variant="label-hidden"` attributes and use `aria-Labelledby` to reference a label. The component doesn't render an HTML `<label>` element.

lightning:inputRichText

This attribute is new.

- `required`—Marks the text editor as requiring user input. To display an asterisk to indicate input is required, also set `labelVisible="true"`. A default label displays after the asterisk. Wire up your own validation logic as the component doesn't validate for required input.

lightning:map

This attribute is new.

- `options`—Specifies boolean properties you can set to enable or disable controls on the map.
  - `draggable` enables dragging to pan the map. Default is true.
  - `zoomControl` enables zooming controls. Default is true.
  - `scrollwheel` enables zooming with the mouse wheel. Default is true.
  - `disableDefaultUI` disables zooming and choosing the map layer. Default is false.
  - `disableDoubleClickZoom` disables zooming with a mouse double-click. Default is false.

These properties are new for the `mapMarkers` attribute.

- `type`—Defines colored shapes to mark a location. The available shape types are `Circle`, `Rectangle`, and `Polygon`.

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- `radius`—Defines the size of a `Circle` type in meters.
- `bounds`—Defines the corners of a `Rectangle` type in coordinates for north, south, east, and west.
- `paths`—Defines the segments of a `Polygon` type in pairs of coordinates.
- `mapIcon`—Defines a custom SVG icon for a marker.
- `path`—Defines the SVG path for `mapIcon`.
- `scale`—Defines the scale for `mapIcon` for appropriate sizing.
- Styling properties for `type` and `mapIcon` include: `strokeColor`, `strokeOpacity`, `strokeWeight`, `fillColor`, and `fillOpacity`.

For more information, see Customize Markers and Control Map Behavior in lightning-map Base Component on page 506.

lightning:navigation

This pageReference type is new.

- `standard__managedContentPage`—Enables a component to use a pageReference to navigate to a specific CMS content page in an Experience Builder site.

lightning:textarea

This attribute is new.

- `autocomplete`—Textarea fields can be autofilled, based on your browser's support of the feature. The value of the attribute passes through to the browser.

lightning:tree

This property of the `items` attribute has changed.

- `disabled`—A disabled tree item now displays in light text and can't receive focus. Previously, a disabled item appeared in normal text and could receive focus.

SEE ALSO:

Component Library

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:

Functions Namespace (Beta)

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Database Namespace

The Database namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Schema Namespace

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Sfdc_Checkout Namespace

The Sfdc_Checkout namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

Functions Namespace (Beta)

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

📝 **Note:** As a beta feature, Salesforce Functions 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 Salesforce Functions in the Salesforce Functions Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

New Classes

Access deployed Salesforce Functions, and invoke them synchronously or asynchronously.

Use methods in the `Function` class to retrieve deployed Function instances, and invoke Function instances. The `get()` method retrieves deployed Function instances by name. The `invoke()` methods invoke Functions synchronously and asynchronously.

New Enums

Get the state of a Function invocation.

The `FunctionInvocationStatus` enum represents the current state of a Function invocation, such as `PENDING` or `SUCCESS`.

New Interfaces

Specify a callback for an asynchronous Function invocation.

When invoking a Function asynchronously, provide a class that implements the `FunctionCallback` interface. The `handleResponse()` method of your class is called when the Function is invoked asynchronously.

Get the results of a Function invocation.

Use the `FunctionInvocation` interface to get details about successful or failed Function invocations. Use `getError()` to get a `FunctionInvocationError` instance that contains error information about failed invocations. Use `getResponse()` to get the Function response. Use `getStatus()` to determine the invocation status. For tests, you can use your own class that implements `FunctionInvocation`.

Get more details on failed invocations.

Use the `FunctionInvocationError` interface to get more details about a failed Function invocation. Methods such as `getMessage()` and `getStack()` return detailed information on why the invocation failed. For tests, you can use your own class that implements `FunctionInvocationError`.

Database Namespace

The Database namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Convert a lead to a business account and person account at the same time

Use the new Apex `getRelatedPersonAccountId()`, `setRelatedPersonAccountId(relatedPersonAccountId)`, `getRelatedPersonAccountRecord()`, and `setRelatedPersonAccountRecord(Entity relatedPersonAccountRecord)` methods of the ConvertLead class to convert a lead to a new or existing person account record.

> 🖉 Note: To set the related person account, use either `setRelatedPersonAccountId()` to specify an existing ID or `setRelatedPersonAccountRecord()` to specify a new record, but not both. The person account appears in the Related Contacts list on the business account's record home page.

Specify a new or existing person account record when converting a lead to a business account and person account

The new `relatedPersonAccountId` and `relatedPersonAccountRecord` properties let you indicate an existing record ID or a new entity record.

Get the resulting person account ID after converting a lead

Use the `getRelatedPersonAccountId()` method of the LeadConvertResult class to return the ID of the new or existing related person account.

Schema Namespace

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

VERSIONED BEHAVIOR CHANGE: From version 51.0 onwards, the `getReferenceTo()` method in the `Schema.DescribeFieldResult` class returns referenced objects that aren't accessible to the context user.

If the context user has access to an object's field that references another object, irrespective of the context user's access to the cross-referenced object, the `DescribeFieldResult.getReferenceTo()` method returns references. In version 50.0 and earlier, if the context user doesn't have access to the cross-referenced object, the method returns an empty list.

Sfdc_Checkout Namespace

The Sfdc_Checkout namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Support synchronous executions of B2B Commerce integrations.

These are highlights of properties in the new `IntegrationStatus` class. The `IntegrationStatus.Status` property indicates the status of a running integration.

Support integrations within your B2B Commerce checkout.

These are highlights of properties in the new `IntegrationInfo` class. The `IntegrationInfo.IntegrationId` property provides a unique integration ID. The `IntegrationInfo.JobId` property provides a unique ID for the integration job.

Customize delivery methods within your B2B Commerce checkout.

These are highlights of properties in the new `B2BCheckoutController` class. Use the `getDeliveryMethods` method to connect your checkout with delivery information.

New Enums

Check the status of a current B2B Commerce integration.

Use the new `IntegrationStatus.Status` enum.

New Interfaces

Implement asynchronous integrations in Lightning B2B Commerce.

Use the new `AsyncCartProcessor` interface.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Obtain a map containing all custom metadata records or a single record sObject for a custom metadata type.

Use the new Apex `getAll()`, `getInstance(recordId)`, `getInstance(qualifiedApiName)`, or `getInstance(developerName)` methods to retrieve custom metadata type records.

Example:

This sample returns a single record sObject for the custom metadata type named `Games_mdt` with record ID specified as `m00000000000001`.

```
Games__mdt mc = Games__mdt.getInstance('m00000000000001');
```

Convert an 18-character Id value to a 15-character case-sensitive string.

Use the `to15()` method in the `System.Id` class. This method uses the case-sensitivity checksum in the 18-character Id value to fix any mangled casing and returns a 15-character case-sensitive string.

Example:

```
String Id_15_char = '0D5B000001DVM9t';
String Id_18_char = '0D5B000001DVM9tkAh';
ID testId = Id_18_char;
System.assertEquals(testId.to15(),Id_15_char);
```

VERSIONED BEHAVIOR CHANGE: From version 51.0 onwards, the `format()` method in the `System.String` class supports single quotes in the `stringToFormat` parameter.

The `String.format()` method supports single quotes in the `stringToFormat` parameter and returns a formatted string using the `formattingArguments` parameter. In version 50.0 and earlier, single quotes weren't supported.

VERSIONED BEHAVIOR CHANGE: From version 51.0 onwards, the `hashCode()` method in the `System.System` class returns the same hashCode for identical Id values.

In version 50.0 and earlier, identical Id values didn't always generate the same hashCode value.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex. Do more with B2B Commerce for Lightning orders and wishlists. Some B2B Commerce for Lightning methods are available to guest users. Get CMS managed content using content keys.

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 Connect in Apex Input Classes

These input classes are new.

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 for Lightning

These new methods are in the `ConnectApi.CommerceBuyerExperience` class.

Get order delivery group summaries

- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, pageSize)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, pageParam)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, fields)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, pageParam, fields)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, fields, pageSize)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, fields, sortParam)`
- `getOrderDeliveryGroupSummaries(webstoreId, effectiveAccountId, orderSummaryId, fields, pageSize, sortParam)`

Get order item summaries

- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, pageSize)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId)`

- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, pageSize)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, pageParam)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, pageSize)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, pageParam)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, sortParam)`
- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, pageSize, sortParam)`

Get order summaries

- `getOrderSummaries(webstoreId)`
- `getOrderSummaries(webstoreId, effectiveAccountId)`
- `getOrderSummaries(webstoreId, effectiveAccountId, fields)`
- `getOrderSummaries(webstoreId, effectiveAccountId, fields, pageSize, pageToken)`
- `getOrderSummaries(webstoreId, effectiveAccountId, fields, pageSize, pageToken, sortOrder)`
- `getOrderSummaries(webstoreId, effectiveAccountId, fields, pageSize, pageToken, sortOrder, earliestDate, latestDate)`
- `getOrderSummaries(webstoreId, effectiveAccountId, fields, pageSize, pageToken, sortOrder, earliestDate, latestDate, ownerScoped)`

These new and changed methods are in the `ConnectApi.CommerceCatalog` class.

Get a product with variation and attribute information

- `getProduct(webstoreId, productId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia, excludeEntitlementDetails, excludePrimaryProductCategory, excludeVariationInfo, excludeAttributeSetInfo)`

These methods are now available to guest users

- `getProduct(webstoreId, productId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia, excludeEntitlementDetails, excludePrimaryProductCategory)`
- `getProductCategory(webstoreId, productCategoryId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia)`
- `getProductCategoryPath(webstoreId, productCategoryId)`

These methods are in the `ConnectApi.CommerceStorePricing` class.

These methods are now available to guest users

- `getProductPrice(webstoreId, productId, effectiveAccountId)`
- `getProductPrices(webstoreId, effectiveAccountId, pricingInput)`

These new methods are in the `ConnectApi.CommerceWishlist` class.

📝 **Note:** To add valuable new query parameters but decrease the number of get wishlist methods, we're replacing all previously documented wishlist get methods with these new methods. The only exception is the `getWishlistSummaries(webstoreId, effectiveAccountId, includeDisplayedList)` method, introduced in version 49.0, which is still available.

Get a wishlist with product fields, sorted by items, that has a specified number of items per page

- `getWishlist(webstoreId, effectiveAccountId, wishlistId, productFields, sortItemsBy)`
- `getWishlist(webstoreId, effectiveAccountId, wishlistId, productFields, pageSize, sortItemsBy)`

Get sorted wishlist items with product fields and a specified number of items per page

- `getWishlistItems(webstoreId, effectiveAccountId, wishlistId, productFields, pageParam, sortItemsBy)`
- `getWishlistItems(webstoreId, effectiveAccountId, wishlistId, productFields, pageParam, pageSize, sortItemsBy)`

Get wishlist summaries with product fields, sorted by items, that has a specified number of items per page

- `getWishlistSummaries(webstoreId, effectiveAccountId, includeDisplayedList, productFields, sortItemsBy)`
- `getWishlistSummaries(webstoreId, effectiveAccountId, includeDisplayedList, productFields, pageSize, sortItemsBy)`

Delete a wishlist

- `deleteWishlist(webstoreId, effectiveAccountId, wishlistId)`

CMS Managed Content

These new methods are in the `ConnectApi.ManagedContent` class.

Get published managed content versions for a channel using content keys

- `getContentByContentKeys(channelId, contentKeys, pageParam, pageSize, language, managedContentType, includeMetadata, startDate, endDate, showAbsoluteUrl)`

Get published managed content versions for a community using content keys

- `getManagedContentByContentKeys(communityId, contentKeys, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)`

Get published managed content versions for a community using content keys and content topic names

- `getManagedContentByTopicsAndContentKeys(communityId, contentKeys, topics, pageParam, pageSize, language, managedContentType, showAbsoluteUrl)`

Payments

These new methods are in the `ConnectApi.Payments` class.

Reverse a payment authorization

`reverseAuthorization(AuthReversalInput, authorizationId)`

Authorize a payment

`authorize(authorizePayment)`

Employee Profiles

These new methods are in the `ConnectApi.EmployeeProfiles` class.

Get an employee's banner photo or photo

- `getBannerPhoto(employeeId)`
- `getPhoto(employeeId)`

Set and crop an employee's banner photo or photo

- `setBannerPhoto(employeeId, fileId, versionNumber)`
- `setBannerPhoto(employeeId, fileUpload)`
- `setBannerPhotoWithAttributes(employeeId, bannerPhoto)`
- `setBannerPhotoWithAttributes(employeeId, bannerPhoto, fileUpload)`
- `setPhoto(employeeId, fileId, versionNumber)`
- `setPhoto(employeeId, fileUpload)`
- `setPhotoWithAttributes(employeeId, photo)`
- `setPhotoWithAttributes(employeeId, photo, fileUpload)`

Delete an employee's banner photo or photo

- `deleteBannerPhoto(employeeId)`
- `deletePhoto(employeeId)`

Field Service

These new methods are in the `ConnectApi.FieldService` class.

Preview and create shifts from a pattern

- `previewShiftsFromPattern(shiftsFromPatternInput, shiftPatternId)`
- `createShiftsFromPattern(shiftsFromPatternInput, shiftPatternId)`

Personalization

This new method is in the `ConnectApi.Personalization` class.

Get assigned audiences that match the user context and have field based criteria

- `getAudiences(communityId, ipAddress, domain, userId, publishStatus, includeAudienceCriteria, targetTypes, recordId)`

Order Management

This new method is in the `ConnectApi.FulfillmentOrder` class.

Create multiple FulfillmentOrders in a single request.

- `createMultipleFulfillmentOrder(multipleFulfillmentOrderInput)`

These methods are in the new `ConnectApi.Routing` class.

Find combinations of inventory locations that can fulfill an order within a specified limit of shipment splits.

- `findRoutesWithFewestSplits(findRoutesWithFewestSplitsInputRepresentation)`

Compare the average shipping distances for different sets of locations that can fulfill an order.

- `rankAverageDistance(rankAverageDistanceInputRepresentation)`

Omnichannel Inventory

These methods are in the new `ConnectApi.OmnichannelInventoryService` class.

Create an inventory reservation in Omnichannel Inventory.

- `createReservation(createReservationInputRepresentation)`

Fulfill one or more inventory reservations.

- `fulfillReservation(fulfillReservationInputRepresentation)`

Retrieve inventory availability data for one or more products at one or more inventory locations or location groups.

- `getInventoryAvailability(inventoryAvailabilityInputRepresentation)`

Retrieve the status of an inventory availability upload job.

- `getInventoryAvailabilityUploadStatus(uploadId)`

Retrieve the status of a publish location structure job.

- `getPublishLocationStructureStatus(uploadId)`

Asynchronously publish information about your inventory locations and location groups to Omnichannel Inventory.

- `publishLocationStructure()`

Release one or more existing inventory reservations to free up that inventory.

- `releaseReservation(releaseReservationInputRepresentation)`

Upload an inventory availability data file to Omnichannel Inventory.

- `submitInventoryAvailabilityUpload(fileUpload)`

Transfer one or more inventory reservations between locations or location groups.

- `transferReservation(transferReservationInputRepresentation)`

New Connect in Apex Input Classes

These input classes are new.

Field Service

`ConnectApi.ShiftsFromPatternInput`

This new input class has these properties.

- `schedulingEndDate`—Scheduling end date in YYYY-MM-DD format.
- `schedulingOccurrences`—Number of scheduling occurrences.
- `schedulingStartDate`—Scheduling start date in YYYY-MM-DD format.
- `serviceResourceId`—ID of the service resource to assign shifts to.
- `serviceTerritoryId`—ID of the service territory to assign shifts to.

Payments

ConnectApi.AddressRequest

This new input class has these properties.

- `city`—Payment method city.
- `companyName`—Payment method company name.
- `country`—Payment method country.
- `postalCode`—Payment method postal code.
- `state`—Payment method state.
- `street`—Payment method street.

ConnectApi.AuthApiPaymentMethodRequest

This new input class is a subclass of `ConnectApi.BaseApiPaymentMethodRequest` and has these properties.

- `cardPaymentMethod`—Card payment method information.

ConnectApi.AuthorizationReversalRequest

This new input class is a subclass of `ConnectApi.BaseRequest` and has these properties.

- `accountID`—Account for the payment authorization reversal. Must match the payment authorization's account.
- `amount`—Amount of adjustment applied to the payment authorization.
- `comments`—Users can add comments to provide additional details about a record. Maximum of 1,000 characters.
- `effectiveDate`—Date that the adjustment takes effect on the authorization.

ConnectApi.AuthorizationRequest

This new input class is a subclass of `ConnectApi.BaseRequest` and has these properties.

- `accountId`—Salesforce account that contains the payment transaction being authorized.
- `amount`—Authorization amount.
- `comments`—Optional comments for the payment authorization.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment group record.
- `effectiveDate`—Date that the authorization will be applied to the transaction.
- `paymentGatewayId`—Payment gateway that processes the authorization.
- `paymentGroup`—Payment group for the authorization. The payload must reference either a `paymentGroup` or a `paymentGroupId`, but not both.
- `paymentMethod`—Payment method used in the payment gateway for the authorization transaction.

ConenctApi.BaseApiPaymentMethodRequest

This new abstract input class is a superclass of `ConnectApi.AuthApiPaymentMethodRequest` and has these properties.

- `address`—Payment method address.
- `id`—Payment method record ID. Used in payment transactions.
- `saveForFuture`—Shows whether Salesforce saves the payment method for future use.

ConnectApi.BasePaymentMethodRequest

This new abstract input class is a superclass of `ConnectApi.CardPaymentMethodRequest` and has no additional properties.

ConnectApi.CardPaymentMethodRequest

This new input class has is a subclass of `ConnectApi.BasePaymentMethodRequest` and has these properties.

- `accountId`—Salesforce account to which this payment method is linked.

- `cardCategory`—Card processing type.
- `cardHolderFirstName`—First name of the card holder.
- `cardHolderLastName`—Last name of the card holder.
- `cardHolderName`—Full name of the card holder.
- `cardNumber`—Card number.
- `cardType`—Card network type.
- `comments`—Optional comments for the card payment method.
- `cvv`—CVV.
- `email`—Email.
- `expiryMonth`—Card expiration month.
- `expiryYear`—Card expiration year.
- `nickName`—Optional nickname for the card.
- `startMonth`—Start month of the card.
- `startYear`—Start year of the card.

ConnectApi.BaseRequest

This new abstract input class is a subclass of `ConnectApi.AuditParamsRequest`, superclass of `ConnectApi.AuthorizationRequest`, `ConnectApi.CaptureRequest`, `ConnectApi.RefundRequest` and has these additional properties.

- `additionalData`—An optional map of additional parameters to be sent to the payment gateway.
- `idempotencyKey`—Idempotency key.

Order Management

ConnectApi.FindRoutesWithFewestSplitsInputRepresentation

This new input class has these properties.

- `locationAvailableInventory`—Each list element represents the available quantity of a product at an inventory location.
- `maximumNumberOfSplits`—The maximum allowable number of shipment splits. Routing options that involve more than this number of splits aren't returned.
- `orderedQuantities`—Each list element represents a quantity of a product to be routed for fulfillment.

ConnectApi.LocationInputRepresentation

This new input class has these properties.

- `countryCode`—The country code of the location.
- `locationIdentifier`—The identifier of the location.
- `postalCode`—The postal code of the location.

ConnectApi.LocationAvailabilityInputRepresentation

This new input class has these properties.

- `externalReferenceId`—The external reference ID of the inventory location.
- `quantity`—The available quantity of the product.
- `stockKeepingUnit`—The Stock Keeping Unit of the product.

ConnectApi.MultipleFulfillmentOrderInputRepresentation

This new input class has this property.

- `fulfillmentOrders`—Each element contains the data to create one fulfillment order.

ConnectApi.QuantityWithSkuInputRepresentation
This new input class has these properties.

- `quantity`—Quantity of the product.

- `stockKeepingUnit`—The SKU of the product.

ConnectApi.RankAverageDistanceInputRepresentation
This new input class has these properties.

- `deliveryCountryCode`—The country code of the order recipient.

- `deliveryPostalCode`—The postal code of the order recipient.

- `distanceUnit`—Specify *mi* or *km* to return average distances in miles or kilometers, respectively.

- `sortResult`—Specify *ASC* or *DESC* to rank the results by average shipping distance in ascending or descending order, respectively.

- `targetLocations`—Each element is a set of inventory locations that can combine to fulfill the order.

ConnectApi.TargetLocationInputRepresentation
This new input class has this property.

- `locations`—A list of locations with information about their country and postal codes.

Omnichannel Inventory

ConnectApi.OCICreateReservationInputRepresentation
This new input class has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.

- `allowPartialReservations`—When true, if the system can't create the entire reservation, then it attempts to create a partial reservation.

- `createRecords`—A list of product quantities and locations or location groups.

- `expirationSeconds`—A length of time in seconds. If the reservation isn't fulfilled within this amount of time after the `reservationTime`, then it expires.

- `externalRefId`—External reference ID.

- `reservationTime`—The time at which to record the reservation. Example: 2020-07-24T21:13:00Z

ConnectApi.OCICreateReservationSingleInputRepresentation
This new input class has these properties.

- `locationGroupIdentifier`—Identifier of the location group at which to reserve inventory.

- `locationIdentifier`—Identifier of the location at which to reserve inventory.

- `quantity`—The quantity of the product to reserve.

- `stockKeepingUnit`—The SKU of the product to reserve.

ConnectApi.OCIFulfillReservationInputRepresentation
This new input class has this property.

- `fulfillmentRecords`—A list of inventory reservations.

ConnectApi.OCIFulfillReservationSingleInputRepresentation
This new input class has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.
- `externalRefId`—The external reference ID of the location that's fulfilling the reservation.
- `locationIdentifier`—The identifier of the location that's fulfilling the reservation.
- `quantity`—The quantity being fulfilled.
- `stockKeepingUnit`—The SKU of the product being fulfilled.

ConnectApi.OCIGetInventoryAvailabilityInputRepresentation

This new input class has these properties.

- `locationGroupIdentifier`—The identifier of a location group to retrieve inventory availability data for. Specifying this value retrieves inventory data for all locations belonging to this group.
- `locationGroupIdentifiers`—A list of up to 100 identifiers of location groups to retrieve inventory availability data for.
- `locationIdentifiers`—A list of up to 100 identifiers of locations to retrieve inventory availability data for.
- `stockKeepingUnit`—The SKU of a product to retrieve inventory availability data for. Specifying a SKU with no locations or location groups returns availability data for that SKU at all inventory locations that are not assigned to location groups.
- `stockKeepingUnits`—A list of up to 100 SKUs of products to retrieve inventory availability data for.
- `useCache`—Whether to fetch the inventory data from the cache. Default value is true.

ConnectApi.OCIReleaseReservationInputRepresentation

This new input class has this property.

- `releaseRecords`—List of inventory reservations to release.

ConnectApi.OCIReleaseReservationSingleInputRepresentation

This new input class has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.
- `externalRefId`—The external reference ID of the location or location group that has the reservation.
- `locationGroupIdentifier`—The identifier of the location group that has the reservation.
- `locationIdentifier`—The identifier of the location that has the reservation.
- `quantity`—The quantity of reserved inventory to release.
- `stockKeepingUnit`—The SKU of the product to release.

ConnectApi.OCITransferReservationInputRepresentation

This new input class has these properties.

- `allOrNothingTransferId`—Controls whether a single failed transfer request cancels all other requests in the call.
- `transferRecords`—A list of inventory reservation transfers.

ConnectApi.OCITransferReservationSingleInputRepresentation

This new input class has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.
- `externalRefId`—The external reference ID of the location receiving the transfer.
- `fromLocationGroupIdentifier`—The identifier of the location group sending the reservation.
- `fromLocationIdentifier`—The identifier of the location sending the reservation.
- `quantity`—The quantity of inventory being transferred.

- `stockKeepingUnit`—The SKU of the product being transferred.
- `toLocationGroupIdentifier`—The identifier of the location group receiving the reservation.
- `toLocationIdentifier`—The identifier of the location receiving the reservation.

New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

B2B Commerce for Lightning

`ConnectApi.CartProductAttribute` (Generally Available)
This 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 generally available property.

- `variationAttributes`—Variation attributes associated with the product.

`ConnectApi.OrderDeliveryGroupSummary`
This new output class has these properties.

- `fields`—Map of fields from order delivery group summary and other related objects that were queried.

`ConnectApi.OrderDeliveryGroupSummaryCollection`
This new output class has these properties.

- `currentPageToken`—Token to the current page of order delivery group summaries.
- `currentPageUrl`—URL to the current page of order delivery group summaries.
- `nextPageToken`—Token to the next page of order delivery group summaries.
- `nextPageUrl`—URL to the next page of order delivery group summaries.
- `orderDeliveryGroups`—Collection of order delivery group summaries.
- `previousPageToken`—Token to previous page of order delivery group summaries.
- `previousPageUrl`—URL to the previous page of order delivery group summaries.

`ConnectApi.OrderItemSummary`
This new output class has these properties.

- `fields`—Map of fields from order item summary and other related objects that were queried.
- `orderItemSummaryId`—ID of the order item summary.
- `orderSummaryId`—ID of the order summary.
- `product`—Associated product item information.

`ConnectApi.OrderItemSummaryCollection`
This new output class has these properties.

- `currentPageToken`—Token to the current page of items.
- `currentPageUrl`—URL to the current page of items.
- `items`—Collection of order item summaries.
- `nextPageToken`—Token to the next page of items.

- `nextPageUrl`—URL to the next page of items.
- `previousPageToken`—Token to the previous page of items.
- `previousPageUrl`—URL to the previous page of items.

`ConnectApi.OrderItemSummaryProduct`
This new output class has these properties.

- `canViewProduct`—Specifies whether the context user can view the product (`true`) or not (`false`).
- `errorCode`—Error code for the product with errors.
- `errorMessage`—Error message for the product with errors.
- `fields`—Map of the product fields queried.
- `media`—Associated product media.
- `productAttributes`—Summary of the product attributes.
- `productId`—ID of the product.

`ConnectApi.OrderSummaryRepresentation`
This new output class has these properties.

- `createdDate`—Created date of the order summary.
- `fields`—Map of requested order summary fields.
- `orderNumber`—Order number of the order summary.
- `orderSummaryId`—ID of the order summary.
- `orderedDate`—Ordered date of the order summary.
- `ownerId`—ID of the owner of the order summary.
- `status`—Status of the order summary.
- `totalAmount`—Total amount of the order summary.

`ConnectApi.OrderSummaryCollectionRepresentation`
This new output class has these properties.

- `count`—Total count of order summaries returned on the current page.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `orderSummaries`—Collection of order summaries.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.
- `sortOrder`—Sort order for order summaries. Values are:
  - `CreatedDateAsc`—Sorts by the oldest created date.
  - `CreatedDateDesc`—Sorts by the most recent created date.
  - `OrderedDateAsc`—Sorts by the oldest ordered date.
  - `OrderedDateDesc`—Sorts by the most recent ordered date.

`ConnectApi.ProductAttributeInfo` (Generally Available)
This output class has these properties.

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- `allowableValues`—Allowable values for the attribute.
- `apiName`—API name of the attribute.
- `availableValues`—Attribute values that are available for the 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` (Generally Available)

This 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` (Generally Available)

This 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` (Generally Available)

This 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 for the product.

`ConnectApi.ProductAttributeSetSummary` (Generally Available)

This output class 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.

`ConnectApi.ProductAttributeSummary` (Generally Available)

This output class 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.

`ConnectApi.ProductAttributesToProductEntry` (Generally Available)

This output class has these properties.

- `canonicalKey`—Attribute API values concatenated with an underscore (_) 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 generally available properties.

- `attributeSetInfo`—Map of the attribute set developer name to its metadata.
- `productClass`—Class of product. Values are:
  - `Simple`
  - `Variation`
  - `VariationParent`
- `variationAttributeSet`—Variation attribute set for the product.
- `variationInfo`—Available and allowable values for variation attributes and a map to resolve variation product IDs from attribute value combinations.
- `variationParentId`—ID of the variation parent.

ConnectApi.ProductVariationInfo (Generally Available)

This output class has these properties.

- `attributesToProductMappings`—Map of the attribute value combinations to the variation product ID.
- `variationAttributeInfo`—Map of field API name to product attribute information.

Chatter

ConnectApi.CallCollaborationCapability

This new output class is a subclass of `ConnectApi.FeedElementCapability` and has these properties.

- `commentEndTime`—End time of the comment on the media player, in seconds.
- `commentStartTime`—Start time of the comment on the media player, in seconds.

ConnectApi.FeedElementCapabilities

This output class has this new property.

- `callCollaboration`—If a feed element has this capability, it has a recording comment.

CMS Managed Content

ConnectApi.ManagedContentMediaNodeValue

This output class has this new property.

- `contentKey`—Content key of the managed content.

ConnectApi.ManagedContentVersion

This output class has this new property.

- `contentKey`—Content key of the managed content.

Field Service

ConnectApi.ShiftsFromPattern

This new output class has these properties.

- `count`—Total count of created shifts.
- `recordIds`—Collection of created shift IDs.

Payments

ConnectApi.AbstractGatewayResponse

This new output class has these new properties.

- `gatewayReferenceDetails`—Provides information about the gateway communication.
- `gatewayReferenceNumber`—Unique transaction ID created by the payment gateway.

ConnectApi.PaymentAuthAdjustmentResponse

This new output class has these new properties.

- `accountId`—ID of the account containing the payment authorization being adjusted.
- `amount`—Amount of the payment authorization adjustment.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment authorization adjustment.
- `effectiveDate`—Date when the authorization adjustment becomes effective.
- `id`—ID of the PaymentAuthAdjustment record.
- `paymentAuthAdjustmentNumber`—System-defined reference number.
- `requestDate`—Date when the authorization adjustment transaction occurred.
- `status`—Status of the payment authorization adjustment.

ConnectApi.AuthReversalGatewayResponse

This new output class is a subclass of `ConnectApi.AbstractGatewayResponse` and has no additional properties.

ConnectApi.AuthorizationReversalResponse

This output class has these new properties.

- `error`—Error response representation for the authorization reversal.
- `gatewayResponse`—Gateway response representation for authorization reversal.
- `paymentAuthAdjustment`—Payment authorization adjustment response representation for the authorization reversal.
- `paymentGatewayLogs`—Gateway log collection representation for the authorization reversal.

ConnectApi.AuthorizationGatewayResponse

This new output class is a subclass of `ConnectApiAbstractGatewayResponse` and has these new properties.

- `gatewayAuthorizationCode`—Authorization code for the payment gateway.

ConnectApi.AuthorizationResponse

This output class has these new properties.

- `error`—Error representation for the payment authorization.
- `gatewayResponse`—Gateway response representation for the payment authorization.
- `paymentAuthorization`—Payment authorization representation.
- `paymentGatewayLogs`—Gateway log list representation for the payment authorization.
- `paymentGroup`—Payment group representation for the payment authorization.
- `paymentMethod`—Payment method representation for the payment authorization.

ConnectApi.PaymentAuthorizationResponse

This output class has these new properties.

- `accountId`—Salesforce account for the payment authorization.
- `amount`—Amount that the gateway authorized for the payment transaction.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment group record.
- `effectiveDate`—Date that the authorization becomes effective.
- `expirationDate`—Date that the authorization expires.
- `id`—ID of the payment authorization record.
- `paymentAuthorizationNumber`—System-defined number for the payment authorization record.
- `requestDate`—Date that the authorization occurred.
- `status`—Status of the payment authorization as returned by the gateway.

ConnectApi.PaymentMethodResponse

This output class has these new properties.

- `accountId`—Account for the payment method.
- `id`—ID of the payment method.
- `status`—Status of the payment method.

Personalization

ConnectApi.AudienceTargetAssignment

This output class has this new property.

- `formulaScope`—Formula scope of the target.

Order Management

ConnectApi.AvailableLocationOutputRepresentation

This new output class has this property.

- `locations`—A list of inventory locations.

ConnectApi.AverageDistanceResultOutputRepresentation

This new output class has this property.

- `distanceCalculation`—Results of the shipping distance calculations.

ConnectApi.DistanceCalculationOutputRepresentation

This new output class has these properties.

- `averageDistance`—The average distance from the locations to the order recipient.
- `locations`—The list of locations and their distances to the order recipient.
- `rank`—This result's rank among all results by average distance to the order recipient.

ConnectApi.FindRoutesWithFewestSplitsOutputRepresentation

This new output class is a subclass of `ConnectApi.BaseOutputRepresentation`. It has this additional property.

- `targetLocations`—Each element of the list is a set of inventory locations that together can fulfill the order being routed.

ConnectApi.FulfillmentGroupOutputRepresentation

This new output class has these properties.

- `fulfilledFromLocationId`—(Creation failed) The input FulfilledFromLocationId.

- `fulfillmentOrderId`—The FulfillmentOrderId from the successfully created FulfillmentOrder.
- `fulfillmentType`—(Creation failed) The input FulfillmentType.
- `orderDeliveryGroupSummaryId`—(Creation failed) The input OrderDeliveryGroupSummaryId.
- `orderItemSummaries`—(Creation failed) The input list of OrderItemSummaries.
- `orderSummaryId`—(Creation failed) The input OrderSummaryId.
- `referenceId`—The referenceId from the FulfillmentGroup input representation.

`ConnectApi.LocationOutputRepresentation`

This new output class has these properties.

- `distance`—The distance from the location to the order recipient.
- `locationIdentifier`—The location identifier.

`ConnectApi.MultipleFulfillmentOrderOutputRepresentation`

This new output class is a subclass of `ConnectApi.BaseOutputRepresentation`. It has this additional property.

- `fulfillmentOrders`—A list of response data for created and failed FulfillmentOrders.

`ConnectApi.OrderItemSummaryOutputRepresentation`

This new output class has these properties.

- `errors`—List of errors specific to the OrderItemSummary, if any.
- `orderItemSummaryId`—ID of the OrderItemSummary.
- `quantity`—Quantity of the OrderItemSummary.

`ConnectApi.RankAverageDistanceOutputRepresentation`

This new output class is a subclass of `ConnectApi.BaseOutputRepresentation`. It has these additional properties.

- `distanceUnit`—The specified unit of distance (miles or kilometers).
- `results`—The results of the shipping distance calculations.

Omnichannel Inventory

`ConnectApi.OCIBaseOutputRepresentation`

This new abstract output class has these properties.

- `errors`—Any errors that were returned.
- `success`—Indicates whether the request was successful.

`ConnectApi.OCICreateReservationErrorOutputRepresentation`

This new output class has these properties.

- `errorCode`—The error code.
- `message`—Details of the error, if available.

`ConnectApi.OCICreateReservationOutputRepresentation`

This new output class has these properties.

- `details`—Details for each product in the reservation.
- `errors`—Any errors returned by the reservation request.
- `expirationTime`—The time at which the reservation would expire.
- `reservationTime`—The time when the reservation was recorded.
- `success`—Indicates whether the reservation was successfully created.

ConnectApi.OCICreateReservationSingleOutputRepresentation
This new output class has these properties.

- `errorCode`—The error code, if any.
- `locationGroupIdentifier`—Identifier of the location group where the inventory is reserved.
- `locationIdentifier`—Identifier of the location where the inventory is reserved.
- `quantity`—The reserved quantity of the product.
- `stockKeepingUnit`—The SKU of the reserved product.

ConnectApi.OCIFulfillReservationErrorOutputRepresentation
This new output class has these properties.

- `details`—Details of the fulfilled reservation, if successful.
- `errorCode`—Error code, if any.
- `message`—Details of the error, if available.

ConnectApi.OCIFulfillReservationOutputRepresentation
This new output class has these properties.

- `errors`—Responses for the individual reservations in the fulfillment request.
- `success`—Indicates whether the request was successful.

ConnectApi.OCIFulfillReservationSingleOutputRepresentation
This new output class has these properties.

- `actionRequestId`—The UUID that identifies the original fulfill reservation request.
- `externalRefId`—The external reference ID of the location that fulfilled the reservation.
- `locationIdentifier`—The identifier of the location that fulfilled the reservation.
- `quantity`—The fulfilled quantity.
- `stockKeepingUnit`—The SKU of the fulfilled product.

ConnectApi.OCIFutureInventoryOutputRepresentation
This new output class has these properties.

- `expectedDate`—Date when the future inventory is expected.
- `quantity`—Quantity of the future inventory.

ConnectApi.OCIGetInventoryAvailabilityOutputRepresentation
This new output class is a subclass of `ConnectApi.OCIBaseOutputRepresentation`. It has these additional properties.

- `locationGroups`—A list of inventory availability data for individual location groups.
- `locations`—A list of inventory availability data for individual locations.

ConnectApi.OCIInventoryRecordOutputRepresentation
This new output class has these properties.

- `availableToFulfill`—The Available To Fulfill quantity.
- `availableToOrder`—The Available To Order quantity.
- `effectiveDate`—The effective date of the inventory.
- `futures`—A list of any expected future inventory restocks.
- `onHand`—The On Hand quantity.
- `reserved`—The Reserved quantity.
- `safetyStockCount`—The Safety Stock Count.

- `stockKeepingUnit`—The SKU of the product.

ConnectApi.OCILocationAvailabilityOutputRepresentation

This new output class has these properties.

- `inventoryRecords`—A list of availability data for individual products at this location.
- `locationIdentifier`—The identifier of the location.

ConnectApi.OCILocationGroupAvailabilityOutputRepresentation

This new output class has these properties.

- `inventoryRecords`—A list of availability data for individual products. The data combines the quantities for all locations belonging to this location group.
- `locationGroupIdentifier`—The identifier of the location group.

ConnectApi.OCIPublishLocationStructureOutputRepresentation

This new output class is a subclass of `ConnectApi.OCIBaseOutputRepresentation`. It has this additional property.

- `uploadId`—Identifier of the publish job. Use this value to retrieve the status of the job.

ConnectApi.OCIPublishLocationStructureStatusOutputRepresentation

This new output class is a subclass of `ConnectApi.OCIBaseOutputRepresentation`. It has these additional properties.

- `endTimeUTC`—The UTC time when the job finished. (for example: "2020-07-06T22:54:08.012Z")
- `recordsProcessedCount`—The number of records processed by the job.
- `recordsReadCount`—The number of records read by the job.
- `recordsSkippedCount`—The number of records skipped by the job.
- `startTimeUTC`—The UTC time when the job started. (for example: "2020-07-06T22:53:06.788Z")
- `status`—The status of the job. (e.g., "PENDING," "COMPLETED," etc.).
- `uploadId`—Identifier of the job.
- `validationErrors`—List of any validation errors returned by the job.
- `validationStatus`—The validation status of the job.

ConnectApi.OCIReleaseReservationErrorOutputRepresentation

This new output class has these properties.

- `details`—Details of the released reservation, if successful.
- `errorCode`—Error code, if any.
- `message`—Details of the error, if available.

ConnectApi.OCIReleaseReservationOutputRepresentation

This new output class has these properties.

- `errors`—Responses for the individual reservations in the release request.
- `success`—Indicates whether the request was successful.

ConnectApi.OCIReleaseReservationSingleOutputRepresentation

This new output class has these properties.

- `actionRequestId`—The UUID that identifies the original release reservation request.
- `externalRefId`—The external reference ID of the location that released the reservation.
- `locationGroupIdentifier`—The identifier of the location group that released the reservation.
- `locationIdentifier`—The identifier of the location that released the reservation.
- `quantity`—The released quantity.

- `stockKeepingUnit`—The SKU of the released product.

ConnectApi.OCITransferReservationErrorOutputRepresentation
This new output class has these properties.

- `details`—Details of the transferred reservation, if successful.

- `errorCode`—Error code, if any.

- `message`—Details of the error, if available.

ConnectApi.OCITransferReservationOutputRepresentation
This new output class has these properties.

- `errors`—Responses for the individual reservations in the transfer request.

- `success`—Indicates whether the request was successful.

ConnectApi.OCITransferReservationSingleOutputRepresentation
This new output class has these properties.

- `actionRequestId`—The UUID that identifies the original transfer reservation request.

- `externalRefId`—The external reference ID of the location that received the reservation.

- `fromLocationGroupIdentifier`—The identifier of the location group that sent the reservation.

- `fromLocationIdentifier`—The identifier of the location that sent the reservation.

- `quantity`—The quantity of transferred inventory.

- `stockKeepingUnit`—The SKU of the transferred product.

- `toLocationGroupIdentifier`—The identifier of the location group that received the reservation.

- `toLocationIdentifier`—The identifier of the location that received the reservation.

ConnectApi.OCIUploadInventoryAvailabilityOutputRepresentation
This new output class is a subclass of `ConnectApi.OCIBaseOutputRepresentation`. It has this additional property.

- `uploadId`—Identifier of the upload job. Use this value to retrieve the status of the job.

ConnectApi.OCIUploadInventoryAvailabilityStatusOutputRepresentation
This new output class is a subclass of `ConnectApi.OCIBaseOutputRepresentation`. It has these additional properties.

- `endTimeUTC`—The UTC time when the job finished. (for example: "2020-07-06T22:54:08.012Z")

- `recordsProcessedCount`—The number of records processed by the job.

- `recordsReadCount`—The number of records read by the job.

- `recordsSkippedCount`—The number of records skipped by the job.

- `startTimeUTC`—The UTC time when the job started. (for example: "2020-07-06T22:53:06.788Z")

- `status`—The status of the job. (e.g., "PENDING," "COMPLETED," etc.).

- `uploadId`—Identifier of the job.

- `validationErrors`—List of any validation errors returned by the job.

- `validationStatus`—The validation status of the job.

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.CardCategory
This new enum has these values.

- `CreditCard`—Shows that the card is a credit card.
- `DebitCard`—Shows that the card is a debit card.

ConnectApi.CardType

This new enum has these values.

- `AmericanExpress`
- `DinersClub`
- `JCB`
- `Maestro`
- `MasterCard`
- `Visa`

ConnectApi.FeedElementCapabilityType

This enum has this new value.

- `CallCollaboration`—The feed element has a recording comment.

ConnectApi.OrderDeliveryGroupSummarySort

This new enum has these values.

- `IdAsc`—Sorts by ID in ascending alphanumeric order (A–Z, 0–9).
- `IdDesc`—Sorts by ID in descending alphanumeric order (Z–A, 9–0).

ConnectApi.OrderItemSummarySort

This new enum has these values.

- `IdAsc`—Sorts by ID in ascending alphanumeric order (A–Z, 0–9).
- `IdDesc`—Sorts by ID in descending alphanumeric order (Z–A, 9–0).

ConnectApi.OrderSummarySortOrder

This new enum has these values.

- `CreatedDateAsc`—Sorts by the oldest created date.
- `CreatedDateDesc`—Sorts by the most recent created date.
- `OrderedDateAsc`—Sorts by the oldest ordered date.
- `OrderedDateDesc`—Sorts by the most recent ordered date.

ConnectApi.ProductClass (Generally Available)

This enum has these values.

- `Simple`
- `Variation`
- `VariationParent`

ConnectApi.WishlistItemSortOrder

This new enum has these values.

- `CreatedDateAsc`—Sorts by oldest creation date.
- `CreatedDateDesc`—Sorts by most recent creation date.

API: New and Changed Items

Access more data objects and metadata types in API version 51.0.

IN THIS SECTION:

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

Add images to and choose from more positions for in-app guidance

Use the new `ImageId`, `ImageLocation`, and `ImageAltText` fields on the PromptVersion object. Choose from more position options for your prompts by using the `DisplayPosition` field. We added the `TargetPageKey1Ref` and `TargetPageKey3` fields so that Salesforce can identify the prompt's page location.

Snooze in-app guidance

End users can snooze in-app guidance. Use the new `SnoozeUntil` and `TimesSnoozed` fields and the amended `LastResult` field on the PromptAction object.

DEPRECATED: The `TargetAppDeveloperName` and `TargetAppNamespacePrefix` fields on the PromptVersion object are deprecated

The fields are deprecated in API version 51.0.

Chatter

Store the date and time values of questions and answers

Use the new NetworkFeedResponseMetric object.

Commerce

Add the CartDeliveryGroup object to your layouts

The CartDeliveryGroup object attribute `layoutable` is now true.

Add the CartTax object to your layouts

The CartTax object attribute `layoutable` is now true.

Let guest buyers view your store

Use the new GuestBuyerProfile object.

Add ProductAttribute picklist items to an org

Use the new `ProductAttribute` object.

Group product attributes into a ProductAttributeSet

Use the new `ProductAttributeSet` object.

Associate a ProductAttributeSetItem to a product

Use the new `ProductAttributeSetItem` object.

Retrieve a SalesStoreCatalog

The SalesStoreCatalog object is now `retrievable`.

Identify the guest buyer profile for your store

Use the new `GuestBuyerProfileId` field on the existing WebStore object.

Determine whether guest buying is enabled for your store

Use the new `OptionsGuestBrowsingEnabled` field on the existing WebStore object.

Add the WishlistItem object to your layouts

The WishlistItem object attribute `layoutable` is now true.

Manage an inventory location with Omnichannel Inventory

Use the new `ShouldSyncWithOci` field on the Location object.

Organize your Omnichannel Inventory locations into groups

Use the new LocationGroup and LocationGroupAssignment objects in the new Omnichannel Inventory feature.

Track progress and status information for external synchronizations to the Omnichannel Inventory service

Use the new AsyncOperationLog object in the new Omnichannel Inventory feature.

Track order items by shipment

Use the new ShipmentItem object and the new `DeliveryMethodId`, `FulfillmentOrderId`, `OrderSummaryId`, and `TotalItemsQuantity` fields on the Shipment object.

Create fulfillment orders without an account or type

On the FulfillmentOrder object, the `AccountId`, `Type`, and `TypeCategory` fields are now nillable.

Schedule and record attempts to route an order summary to inventory locations for fulfillment

Use the new OrderSummaryRoutingSchedule object.

Track the number of attempts made to route an order summary to inventory locations for fulfillment

Use the new `RoutingAttempts` field on the OrderSummary object.

Commerce Payments

Create a payment method entity to store payment method information not represented by another pre-defined payment method type such as CardPaymentMethod or DigitalWallet

Use the new `AlternativePaymentMethod` object.

Store information about a change made against an outstanding payment authorization

Use the new `PaymentAuthorizationAdjustment` entity.

BEHAVIOR CHANGE: New formula for TotalAuthReversalAmount on `PaymentAuthorization`

The TotalAuthReversalAmount formula is now the sum of all processed authorization reversals against the payment authorization.

BEHAVIOR CHANGE: New formula for Balance on `PaymentAuthorization`

The Balance formula is now authorized amount – total processed captured amount – total processed authorization reversal amount. Balance can be positive or negative.

Specify that a GtwyProvPaymentMethodType can be related to an AlternativePaymentMethod

Use the new `AlternativePaymentMethod` value in the existing `PaymentMethodType` field on the `GtwyProvPaymentMethodType` object.

Specify that PaymentGatewayLogs can record information about an authorization reversal

Use the new `AuthorizationReversal` value in the existing `InteractionType` field on the `PaymentGatewayLog` object.

Customization

Get the status of the flow interview

Use the new `InterviewStatus` field on the FlowInterview object.

Development

Get monitoring information about your push upgrades

Use the `DurationSeconds`, `EndTime`, and `StartTime` fields on the PackagePushRequest and PackagePushJob objects. These fields are new in API version 51.0.

Get information about the AI apps in your org

Use the AIApplication, AIApplicationConfig, MLField, and MLPredictionDefinition objects.

Event Monitoring

Determine the geolocation of the client request

Use the new CLIENT_GEO field in the Lightning Error, Lightning Interaction, Lightning Page View, and Lightning Performance event types in the EventLogFile object.

Monitor usage within your Commerce instance

Use the new One Commerce Usage event type in the EventLogFile object.

Experience Cloud

Control profile access to fields on Knowledge search results

Use the new `OptionsProfileBasedLayoutsForKnowledgeSearchEnabled` field on the Network object.

Knowledge

Query Knowledge article versions by language

Clarified in the SOAP API Developer Guide that before API version 47.0, you must include the `Language` field to filter queries on the `KnowledgeArticleVersion` and `Knowledge_kav` objects. In API version 47.0 and later, you can filter queries on Knowledge article versions with or without `Language`.

Lightning Components

View information about requests to Apex methods from Aura or Lightning web components in your event log files

The Aura Request event type in the `EventLogFile` object enables you to monitor information such as benchmarking request time or identifying the URI of an unsuccessful request.

Mobile

Select records for specific users to view when they're offline in the Salesforce Field Service mobile app for iOS and Android

Use the new BriefcaseDefinition object.

Assign selected records to users and user groups

Use the new BriefcaseAssignment object.

Create a rule to filter records

Use the new BriefcaseRule object.

Include filter criteria for record selection

Use the new BriefcaseRuleFilter object.

Revenue

Apply tiered discounts based on the number of items purchased

Use the new PriceAdjustmentSchedule object. Introduced in API version 47.0, this object has been added to the *SOAP API Developer Guide*.

Define discount tiers for a price adjustment schedule

Use the new PriceAdjustmentTier object. Introduced in API version 47.0, this object has been added to the *SOAP API Developer Guide*.

Choose a method of applying tiered pricing

Use the new `AdjustmentMethod` field on the PriceAdjustmentSchedule object to set slab or range pricing by tier.

Learn which price book entry is associated with your price adjustment schedule

Use the PricebookEntryAdjustment object. Introduced in API version 47.0, this object has been added to the *SOAP API Developer Guide*.

Learn which products in your service contract have subscription pricing

Use the new `SubscriptionPricing` field on the ContractLineItem object.

See the total amount of revenue for an asset

Use the new `TotalLifecycleAmount` field on the Asset object to see revenue from each state in an asset's lifecycle.

Sales

Store information about video calls, such as who attended and what was said

Use the new VideoCall, VideoCallRecording, and VideoCallParticipant objects. Let Einstein Conversation Insights tell you which recordings are the most important.

Create and share groups of useful voice calls

Use the new SharingRecordCollection, SharingRecordCollectionItem, and SharingRecordCollectionMember objects to organize your calls in useful categories for your Einstein Conversation Insights users.

Create and distribute shared, public, resource, and user list calendars

Use the CalendarView object to view, create, and distribute shared, public, resource, or user list calendars for your users. Previously, only objects calendars could be created from the API.

Let users track more information on opportunity product records via a lookup relationship to any standard or custom object

On the OpportunityLineItem object, use the new `LastReferencedDate` and `LastViewedDate` fields.

Show whether an order product is a product line or charge line.

Use the `OrderItemType` object. Introduced in API version 48.0, this type has been added to the SOAP API Developer Guide.

Define a sharing entity on an order

Use the `OrderShare` object. Introduced in API version 48.0, this type has been added to the SOAP API Developer Guide.

Define the status of an order

Use the `OrderStatus` object. Introduced in API version 48.0, this type has been added to the SOAP API Developer Guide.

Salesforce Einstein

Learn which language was used in a reply recommendation

On the ReplyText object, use the new `Language` field.

Evaluate customer inputs to be added to the intent training model

Use the new MlIntentUtteranceSuggestion object.

Salesforce Functions (Beta)

See status information and results for an invoked Function

Use the new FunctionInvocationRequest object.

Salesforce Surveys

Validation added for a Survey Question

Added the `ValidationType` field in the SurveyQuestion object.

More entity types available

The `SubjectEntityType` field in the SurveySubject object has more values to choose from.

- LoyaltyProgram
- Promotion
- Asset Campaign
- LoyaltyProgramPartner
- VolunteerProject
- TransactionJournal
- ServiceResource
- RebateProgram

Add the email sender in a Survey

Define an organization-wide email address using the `EmailSender` field in the SurveyVersionAddlInfo object.

Add an engagement context to a Survey

Map an engagement context to a survey using the `EngagementContextMetadata` field in the SurveyVersionAddlInfo object.

Security, Privacy, and Identity

See success and failure information about authentication events

Use the new IdentityProviderEventStore object.

Monitor how identity providers authenticate users logging in to your org

Use the new `AuthMethodReference` field on the existing LoginHistory object.

Get information about the history and completion of executed Data Subject Access Request policies

Use the new `CompletionDateTime`, `DataSubjectId`, `DeletedDateTime`, `DownloadedDateTime`, `DsarError`, `RequestDateTime`, and `RequestUserId` fields on the existing DsarPolicyLog object in the Customer 360 Privacy Center. You can also use the new Downloaded and Expired values on the existing `RequestStatus` field.

Service

Get more granular information about when events occurred with a conversation entry

On the ConversationEntry object, use the new fields: `EntryTimeMilliSecs`, `ClientTimestamp`, `ClientDuration`, `ServerReceivedTimestamp`.

Protect recipients' privacy with BCC addresses, which are no longer visible to Experience Cloud site users

On the EmailMessage object, the `BccAddress` and `BccIds` fields reflect this updated behavior.

Calculate the total cost from an item's unit price and quantity in an Expense record

Use the new `Discount`, `Quantity`, `Subtotal`, `TotalPrice`, and `UnitPrice` fields on the Expense object.

Query the record ID of the channel used to initialize the Conversation

Use the new `ConversationChannelId` field on the Conversation object.

BEHAVIOR CHANGE: The `AppType` is now nillable on the ConversationParticipant object

You can now set the `AppType` field to null and empty the content.

Get version information about the tenant vendor for a Voice configuration

Use the new `TenantConfigVersion` field on the VoiceVendorInfo object.

Specify more call types when using Voice

Use the new `Callback` picklist value on the `CallType` field on the VoiceCall object. We also added the `CNH` picklist value to the `CurrencyCode` field on the VoiceCall object.

REMOVED: The `TargetUserId` field on the MessagingChannel object was removed

The `TargetUserId` field is no longer available on the MessagingChannel object.

Search for the MessagingChannel object

The MessagingChannel object is now searchable.

Search for the MessagingTemplate object

The MessagingTemplate object is now searchable.

BEHAVIOR CHANGE: The `ConsentType` field on the MessagingChannel object no longer defaulted on create

The property `defaultedOnCreate` on the `ConsentType` field on the MessagingChannel object has changed to false.

Create service appointment filters for Field Service shifts

Use the new RecordsetFilterCriteria and RecordsetFilterCriteriaRule objects.

Record the time zone of timesheet entries for Field Service on the mobile app

Use the new `IsTimeZoneEnabled` field on the FieldServiceMobileSettings object.

Change the work order and service appointment status of a Field Service on the mobile app

Use the new `QuickStatusChangeFlowName` field on the FieldServiceMobileSettings object.

Allow trusted external domains to frame your Embedded Service

Use the new `EmbeddedService` value of the `Context` field on the IframeWhiteListUrl object.

Work.com

Create trust cards to display the COVID safety protocols that your business follows

Use the new LocationTrustMeasure object. This object is available in API version 50.0 and later.

Get info on Employee photo URLs

Use the new `BannerPhotoUrl`, `FullPhotoUrl`, `MediumPhotoUrl`, and `SmallPhotoUrl` fields on the Employee object.

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 Salesforce Scheduler

Subscribe to the new AppointmentSchedulingEvent to receive notifications related to new, modified, or deleted service appointments in Salesforce Scheduler. This event is part of Salesforce Scheduler.

Sales

Be notified when an order's status is changed

Subscribe to the new OrderStatusChangedEvent to receive notifications related to order status changes.

Salesforce doesn't publish an event upon the creation of a draft order.

Mobile

Field removed from Real-Time Event Monitoring Objects

The `Username` field for MobileEmailEvent, MobileEnforcedPolicyEvent, MobileScreenshotEvent, and MobileTelephonyEvent have been removed.

If your org is using optional Apex triggers, remove `obj.UserName__c = event.UserName;` from the Apex triggers to avoid any issues.

Security and Identity: Real-Time Event Monitoring

Filter on UserID to see specific user activities (Beta)

Add the UserID field when you query the ReportEvent object to see activity by a particular user during a specific time frame.

Track Identity Providers for Authentication Requests

Use the new `IdentityProviderEventStore` object to monitor authentication request events from another app provider.

Monitor how users are authenticated into your org

Use the new `AuthMethodReference` field on the existing LoginEvent and LoginEventStream objects to see how third-party identity providers authenticate your users during OpenId Connect single sign-on events.

Development

Use BatchApexErrorEvent triggers to monitor ISV applications

You can now add BatchApexErrorEvent to managed packages. Include BatchApexErrorEvent triggers in your managed packages to monitor the health of batch jobs and take necessary corrective action without any post-installation steps.

Commerce

Monitor browser type, versioning, and store type in Commerce

Use the new `B2BEdition`, `B2BVersion`, `BrowswerDeviceType`, `OsVersion`, and `WebStoreType` fields on the existing CommerceDiagnostic Event object.

SOQL

Salesforce Object Query Language (SOQL) now makes it easy to include pre-defined groupings of fields within a query statement using the new `FIELDS()` function.

Why: In previous versions of SOQL, retrieving fields meant specifying all the names of all the fields you wanted to retrieve. Typically, this required first making an API call to describe the object to get the list of fields (or using the Object Manger) and then laboriously constructing a SOQL query to select all those fields. Further, such a query could exceed the query character limit for large complex queries that retrieve lots of data. The new `FIELDS()` function lets you select all the fields without knowing their names in advance. This eliminates the need for a round-trip to the server to prepare a SOQL statement, eliminates the need for research and a lot of typing, simplifies query statements, and makes it much easier to explore the shape of your objects.

How: Use `FIELDS(ALL)`, `FIELDS(STANDARD)`, or `FIELDS(CUSTOM)` in your `SELECT` statements. For more information, see FIELDS() in the *SOQL and SOSL Reference*.

REST API

REST API includes new, changed, and deprecated resources.

Send rich emails from your flow

Use the new optional `sendRichBody` property on the existing request body for the `emailSimple` standard invocable action. Set it to true to send an email in rich text format. Its default value is false. To learn more, see Send Rich Text Emails from Your Flow Using a Send Email Action on page 430 in Salesforce Release Notes.

Update and write consent for multiple records with the Consent Write API call

Make a PATCH request to the new `/consent/action` resource. For more information, see Sync Consent Data Across Multiple Records on page 503.

Invocable Actions

Invocable Actions represent actions that can be accomplished in Salesforce with APIs.

Invocable actions are available through the REST API. The following actions have been added:

ociCreateReservation

Create inventory reservations in Salesforce Omnichannel Inventory.

ociFulfillReservation

Fulfill inventory reservations in Salesforce Omnichannel Inventory.

ociGetAvailability

Get inventory availability data in Salesforce Omnichannel Inventory.

ociReleaseReservation

Release inventory reservations in Salesforce Omnichannel Inventory.

ociTransferReservation

Transfer inventory reservations in Salesforce Omnichannel Inventory.

createFulfillmentOrders

Create fulfillment orders for multiple order delivery groups in Salesforce Order Management.

orderRoutingFindRoutesWithFewestSplits

Evaluate ordered product quantities against available inventory to determine the smallest combination of locations that can fulfill the order in Salesforce Order Management.

orderRoutingRankByAverageDistance

Calculate the average distance from sets of inventory locations to an order recipient, and return the sets sorted by that average distance in Salesforce Order Management.

For more information on invocable actions, see the Actions Developer Guide.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Do more with B2B Commerce for Lightning orders, wishlists, and generally available product variations. Get CMS managed content using content keys.

IN THIS SECTION:

New and Changed Connect REST API Resources

These resources are new or have changes.

New and Changed Connect REST API Request 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 for Lightning

Get order summaries

Make a GET request to the new `/commerce/webstores/`***`webstoreId`***`/order-summaries` resource.

Get order delivery groups

Make a GET request to the new
`/commerce/webstores/`***`webstoreId`***`/order-summaries/`***`orderSummaryId`***`/delivery-groups` resource.

Get order items

Make a GET request to the new
/commerce/webstores/**webstoreId**/order-summaries/**orderSummaryId**/items resource.

Exclude attribute and variation information when getting a product (generally available)

Make a GET request to the /commerce/webstores/**webstoreId**/products/**productId** resource with the
excludeAttributeSetInfo or excludeVariationInfo parameters.

Get a wishlist with product fields

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId** resource with the new
productFields parameter.

Get a wishlist sorted by items

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId** resource with the new
sortItemsBy parameter.

Get a wishlist with a specified number of items per page

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId** resource with the new
pageSize parameter.

Get wishlist items with product fields

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId**/wishlist-items
resource with the new productFields parameter.

Get sorted wishlist items

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId**/wishlist-items
resource with the new sortItemsBy parameter.

Get wishlist summaries with product fields

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists resource with the new productFields
parameter.

Get wishlist summaries sorted by items

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists resource with the new sortItemsBy
parameter.

Get wishlist summaries with a specified number of items per page

Make a GET request to the /commerce/webstores/**webstoreId**/wishlists resource with the new pageSize
parameter.

Delete a wishlist

Make a DELETE request to the /commerce/webstores/**webstoreId**/wishlists/**wishlistId** resource with the
new effectiveAccountId parameter.

Chatter

Access the call collaboration capability of a feed element

Make a GET request to the new
/chatter/feed-elements/**feedElementId**/capabilities/call-collaboration resource.

CMS Managed Content

Get published managed content versions for a community using content keys

Make a GET request to the /connect/communities/**communityId**/managed-content/delivery resource with
the new contentKeys parameter.

Get published managed content versions for a channel using content keys

Make a GET request to the `/connect/cms/delivery/channels/`**`channelId`**`/contents/query` resource with the new `contentKeys` parameter.

Conversations

Upload bulk conversations

Make a POST request to the new `/connect/conversations/upload` resource with the binary file in a multipart/form-data request.

Get the statuses of bulk conversation uploads

Make a GET request to the new `/connect/conversations/upload` resource with the `uploadIds` request parameter.

Get conversation entries

Make a GET request to the new `/connect/conversation/`**`conversationIdentifier`**`/entries` resource.

Update conversation entries

Make a PATCH request to the new `/connect/conversation/`**`conversationIdentifier`**`/entries` resource with the new Conversation Entries Update Input request body.

Employee Profiles

Get an employee's banner photo

Make a GET request to the new `/connect/employee-profiles/`**`employeeId`**`/banner-photo` resource.

Create and crop an employee's banner photo

Make a POST request to the new `/connect/employee-profiles/`**`employeeId`**`/banner-photo` resource with the Banner Photo Input.

Delete an employee's banner photo

Make a DELETE request to the new `/connect/employee-profiles/`**`employeeId`**`/banner-photo` resource.

Get an employee's photo

Make a GET request to the new `/connect/employee-profiles/`**`employeeId`**`/photo` resource.

Create and crop an employee's photo

Make a POST request to the new `/connect/employee-profiles/`**`employeeId`**`/photo` resource with the Photo Input.

Delete an employee's photo

Make a DELETE request to the new `/connect/employee-profiles/`**`employeeId`**`/photo` resource.

Field Service

Preview shifts from a pattern

Make a GET request to the new `/connect/field-service/shift-patterns/`**`shiftPatternId`**`/shifts` resource with the new Shift from Pattern Input request body.

Create shifts from a pattern

Make a POST request to the new `/connect/field-service/shift-patterns/`**`shiftPatternId`**`/shifts` resource with the new Shift from Pattern Input request body.

Salesforce Scheduler

Get enhanced duration for appointment time slots

The `/connect/scheduling/available-territory-slots` resource now returns available time slots for 31 days from the start time.

Modify a service appointment

Make a PATCH request to the `/connect/scheduling/service-appointments` resource with the new Update Service Appointment Input request body to update the scheduled times, assigned resources, service territory, or work type for an existing appointment.

Payments

Reverse an authorized payment

Make a POST request to the new `/commerce/payments/authorizations/authorizationId/reversals` resource with the new Authorization Reversal Input request body.

Tokenize a payment method

Make a POST request to the new `/commerce/payments/payment-methods` resource with the new Payment Method Tokenization Input request body.

Personalization

Get assigned audiences that match the user context and have field based criteria

Make a GET request to the `/connect/communities/`**`communityId`**`/personalization/audiences` resource with the new `recordId` parameter.

Private Connect

Get a response when you provision, sync, or tear down an inbound network connection

Make a GET request to the `/network-connection/inbound/connections/`**`developerName`** resource.

In version 49.0–50.0, this request results in an empty response. In version 51.0 and later, this request results in the new Network Connection response body.

Get a response when you provision, sync, or tear down an outbound network connection

Make a GET request to the `/network-connection/outbound/connections/`**`developerName`** resource.

In version 49.0–50.0, this request results in an empty response. In version 51.0 and later, this request results in the new Network Connection response body.

Order Management

Create multiple FulfillmentOrders in a single request.

Make a POST request to the new `/commerce/fulfillment/actions/create-multiple` resource with the new Multiple Fulfillment Order Input request body.

Find combinations of inventory locations that can fulfill an order within a specified limit of shipment splits.

Make a POST request to the new `/commerce/order-management/routing/actions/find-routes-with-fewest-splits` resource with the new Find Routes With Fewest Splits Input request body.

Compare the average shipping distances for different sets of locations that can fulfill an order.

Make a POST request to the new
`/commerce/order-management/routing/actions/rank-byaverage-distance` resource with the new
Rank Average Distance Input request body.

Omnichannel Inventory

Create an inventory reservation in Omnichannel Inventory.

Make a POST request to the new `/commerce/oci/reservation/actions/reservations` resource with the new
OCI Create Reservation Input request body.

Fulfill one or more inventory reservations.

Make a POST request to the new `/commerce/oci/reservation/actions/fulfillments` resource with the new
OCI Fulfill Reservation Input request body.

Retrieve inventory availability data for one or more products at one or more inventory locations or location groups.

Make a POST request to the new
`/commerce/oci/availability/availability-records/actions/get-availability` resource with the
new OCI Get Inventory Availability Input request body.

Retrieve the status of an inventory availability upload job.

Make a GET request to the new `/commerce/oci/availability-records/uploads/`**`uploadId`** resource.

Retrieve the status of a publish location structure job.

Make a GET request to the new `/commerce/oci/location-graph/uploads/`**`uploadId`** resource.

Asynchronously publish information about your inventory locations and location groups to Omnichannel Inventory.

Make a POST request to the new `/commerce/oci/location-graph/uploads` resource with no request body.

Release one or more existing inventory reservations to free up that inventory.

Make a POST request to the new `/commerce/oci/reservation/actions/releases` resource with the new OCI
Release Reservation Input request body.

Upload an inventory availability data file to Omnichannel Inventory.

Make a POST request to the new `/commerce/oci/availability-records/uploads` resource with a JSON file request
body.

Transfer one or more inventory reservations between locations or location groups.

Make a POST request to the new `/commerce/oci/reservation/actions/transfers` resource with the new OCI
Transfer Reservation Input request body.

New and Changed Connect REST API Request Bodies

These request bodies are new or have changes.

B2B Commerce for Lightning

Distinct Value Refinement Input

This request body has this generally available property.

- `attributeType`—Search attribute type. Values are:

  - `Custom`

  - `ProductAttribute`

  - `Standard`

Facetable Attribute Input

This request body has this changed property.

- `type`—This property now supports the `ProductAttribute` value (generally available).

Product Search Grouping Input (Pilot)

> ✏️ **Note:** We provide grouping to selected customers through a pilot program that requires agreement to specific terms and conditions. Grouping is subject to change and 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.

This new request body has these properties.

- `groupingOption`—Grouping option for search results. Values are:
  - `NoGrouping`—Search results aren't grouped.
  - `VariationParent`—Search results are grouped by the variation parent.
- `topProductType`—Type of the top product to return for each product group in search results. Value is `VariationParent`.

Product Search Input

This request body has this new property.

- `grouping` (pilot)—Specifies whether to group products in search results and how to group them.

Searchable Attribute Input

This request body has this changed property.

- `type`—This property now supports the `ProductAttribute` value (generally available).

Conversations

Conversation Entries Update Input

This new request body has this property.

- `conversationEntriesUpdates`—List of conversation entry updates.

Conversation Entry Update Input

This new request body has these properties.

- `identifier`—Identifier of the updated conversation entry.
- `messageText`—Message text of the updated conversation entry.

Field Service

Shifts from Pattern Input

This new request body has these properties.

- `schedulingEndDate`—Scheduling end date in YYYY-MM-DD format.
- `schedulingOccurrences`—Number of scheduling occurrences.
- `schedulingStartDate`—Scheduling start date in YYYY-MM-DD format.
- `serviceResourceId`—ID of the service resource to assign shifts to.
- `serviceTerritoryId`—ID of the service territory to assign shifts to.

Available Territory Slots Input

This request body has this new property.

- `filterByResources`—Comma-separated list of service resource IDs. API returns only eligible service resources that are both in the list and in the selected service territory sorted by the order in which the resource IDs are passed.

Update Service Appointment Input

This new request body has these properties.

- `assignedResources`—Service resource who is assigned to a service appointment.
- `schedulingPolicyId`—ID of the `AppointmentSchedulingPolicy` object.
- `serviceAppointment`—Appointment to complete a service work for a customer.
- `serviceAppointmentId`—ID of the service appointment that you want to update.

Order Management

Find Routes With Fewest Splits Input

This new request body has these properties.

- `locationAvailableInventory`—Each list element represents the available quantity of a product at an inventory location.
- `maximumNumberOfSplits`—The maximum allowable number of shipment splits. Routing options that involve more than this number of splits aren't returned.
- `orderedQuantities`—Each list element represents a quantity of a product to be routed for fulfillment.

Location Availability Input

This new request body has these properties.

- `externalReferenceId`—The external reference ID of the inventory location.
- `quantity`—The available quantity of the product.
- `stockKeepingUnit`—The Stock Keeping Unit of the product.

Location Input

This new request body has these properties.

- `countryCode`—The country code of the location.
- `locationIdentifier`—The identifier of the location.
- `postalCode`—The postal code of the location.

Multiple Fulfillment Order Input

This new request body has this property.

- `fulfillmentOrders`—Each element contains the data to create one fulfillment order.

Quantity With Sku Input

This new request body has these properties.

- `quantity`—Quantity of the product.
- `stockKeepingUnit`—SKU of the product.

Rank Average Distance Input

This new request body has these properties.

- `deliveryCountryCode`—The country code of the order recipient.

- `deliveryPostalCode`—The postal code of the order recipient.
- `distanceUnit`—Specify mi or km to return average distances in miles or kilometers, respectively.
- `sortResult`—Specify ASC or DESC to rank the results by average shipping distance in ascending or descending order, respectively.
- `targetLocations`—Each element is a set of inventory locations that can combine to fulfill the order.

Target Location Input

This new request body has this property.

- `locations`—A list of locations with information about their country and postal codes.

Omnichannel Inventory

OCI Create Reservation Input

This new request body has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.
- `allowPartialReservations`—When true, if the system can't create the entire reservation, then it attempts to create a partial reservation.
- `createRecords`—A list of product quantities and locations or location groups.
- `expirationSeconds`—A length of time in seconds. If the reservation isn't fulfilled within this amount of time after the reservationTime, then it expires.
- `externalRefId`—External reference ID.
- `reservationTime`—The time at which to record the reservation.

OCI Create Reservation Single Input

This new request body has these properties.

- `locationGroupIdentifier`—Identifier of the location group at which to reserve inventory.
- `locationIdentifier`—Identifier of the location at which to reserve inventory.
- `quantity`—The quantity of the product to reserve.
- `stockKeepingUnit`—The SKU of the product to reserve.

OCI Fulfill Reservation Input

This new request body has this property.

- `fulfillmentRecords`—A list of inventory reservations.

OCI Fulfill Reservation Single Input

This new request body has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.
- `externalRefId`—The external reference ID of the location that's fulfilling the reservation.
- `locationIdentifier`—The identifier of the location that's fulfilling the reservation.
- `quantity`—The quantity being fulfilled.
- `stockKeepingUnit`—The SKU of the product being fulfilled.

OCI Get Inventory Availability Input

This new request body has these properties.

- `locationGroupIdentifier`—The identifier of a location group to retrieve inventory availability data for. Specifying this value retrieves inventory data for all locations belonging to this group.

- `locationGroupIdentifiers`—A list of up to 100 identifiers of location groups to retrieve inventory availability data for.

- `locationIdentifiers`—A list of up to 100 identifiers of locations to retrieve inventory availability data for.

- `stockKeepingUnit`—The SKU of a product to retrieve inventory availability data for. Specifying a SKU with no locations or location groups returns availability data for that SKU at all inventory locations that aren't assigned to location groups.

- `stockKeepingUnits`—A list of up to 100 SKUs of products to retrieve inventory availability data for.

- `useCache`—Whether to fetch the inventory data from the cache. Default value is true.

OCI Release Reservation Input

This new request body has this property.

- `releaseRecords`—List of inventory reservations to release.

OCI Release Reservation Single Input

This new request body has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.

- `externalRefId`—The external reference ID of the location or location group that has the reservation.

- `locationGroupIdentifier`—The identifier of the location group that has the reservation.

- `locationIdentifier`—The identifier of the location that has the reservation.

- `quantity`—The quantity of reserved inventory to release.

- `stockKeepingUnit`—The SKU of the product to release.

OCI Transfer Reservation Input

This new request body has these properties.

- `allOrNothingTransferId`—Controls whether a single failed transfer request cancels all other requests in the call.

- `transferRecords`—A list of inventory reservation transfers.

OCI Transfer Reservation Single Input

This new request body has these properties.

- `actionRequestId`—A UUID that identifies the request. Use the action request IDs in response data to identify which requests succeeded or failed.

- `externalRefId`—The external reference ID of the location receiving the transfer.

- `fromLocationGroupIdentifier`—The identifier of the location group sending the reservation.

- `fromLocationIdentifier`—The identifier of the location sending the reservation.

- `quantity`—The quantity of inventory being transferred.

- `stockKeepingUnit`—The SKU of the product being transferred.

- `toLocationGroupIdentifier`—The identifier of the location group receiving the reservation.

- `toLocationIdentifier`—The identifier of the location receiving the reservation.

Payments

Authorization Reversal Input

This new request body has these properties.

- `accountId`—Account for the payment authorization reversal. Must match the payment authorization's account.

- `additionalData`—Allows users to enter additional data, if needed for a payment request. The additionalData object consists of entries, each of which includes a key and value. Supports up to five key-value pairs. Each key and each value can contain up to 255 characters.

- `amount`—Amount of adjustment applied to the payment authorization.

- `comments`—Users can add comments to provide additional details about a record. Maximum of 1,000 characters.

- `effectiveDate`—Date that the adjustment takes effect on the authorization.

- `email`—Email of the client that initiated the request.

- `idempotencyKey`—Idempotency key used for the payment request. Can be provided in the payload or the header, but not in both places at once.

- `ipAddress`—IP address of the client who made the request.

- `macAddress`—MAC address of the client who made the request.

- `phone`—Phone number of the client that initiated the request.

Payment Method Tokenization Input

This new request body has these properties.

- `additionalData`—Allows users to enter additional data, if needed for a payment request. The additionalData object consists of entries, each of which includes a key and value. Supports up to five key-value pairs. Each key and each value can contain up to 255 characters.

- `address`—Payment method address.

- `cardPaymentMethod`—Card payment method.

- `email`—Email of the client that initiated the request.

- `idempotencyKey`—Idempotency key used for the payment request. Can be provided in the payload or the header, but not in both places at once.

- `ipAddress`—IP address of the client who made the request.

- `macAddress`—MAC address of the client who made the request.

- `paymentGatewayId`—ID of the payment gateway.

- `phone`—Phone number of the client that initiated the request.

New and Changed Connect REST API Response Bodies

These response bodies are new or have changes.

B2B Commerce for Lightning

Cart Product Attribute (Generally Available)

This 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 generally available property.

- `variationAttributes`—Variation attributes associated with the product.

Distinct Value Search Facet

This response body has this changed property.

- `attributeType`—This property now supports the `ProductAttribute` value (generally available).

Facetable Attribute

This response body has this changed property.

- `type`—This property now supports the `ProductAttribute` value (generally available).

Order Delivery Group Summary

This new response body has these properties.

- `fields`—Map of fields from order delivery group summary and other related objects that were queried.

Order Delivery Group Summary Collection

This new response body has these properties.

- `currentPageToken`—Token to the current page of order delivery group summaries.
- `currentPageUrl`—URL to the current page of order delivery group summaries.
- `nextPageToken`—Token to the next page of order delivery group summaries.
- `nextPageUrl`—URL to the next page of order delivery group summaries.
- `orderDeliveryGroups`—Collection of order delivery group summaries.
- `previousPageToken`—Token to previous page of order delivery group summaries.
- `previousPageUrl`—URL to the previous page of order delivery group summaries.

Order Item Summary

This new response body has these properties.

- `fields`—Map of fields from order item summary and other related objects that were queried.
- `orderItemSummaryId`—ID of the order item summary.
- `orderSummaryId`—ID of the order summary.
- `product`—Associated product item information.

Order Item Summary Collection

This new response body has these properties.

- `currentPageToken`—Token to the current page of items.
- `currentPageUrl`—URL to the current page of items.
- `items`—Collection of order item summaries.
- `nextPageToken`—Token to the next page of items.
- `nextPageUrl`—URL to the next page of items.
- `previousPageToken`—Token to the previous page of items.
- `previousPageUrl`—URL to the previous page of items.

Order Item Summary Product

This new response body has these properties.

- `canViewProduct`—Specifies whether the context user can view the product (`true`) or not (`false`).
- `errorCode`—Error code for the product with errors.
- `errorMessage`—Error message for the product with errors.
- `fields`—Map of the product fields queried.
- `media`—Associated product media.
- `productAttributes`—Summary of the product attributes.
- `productId`—ID of the product.

Order Summary

This new response body has these properties.

- `createdDate`—Created date of the order summary.
- `fields`—Map of requested order summary fields.
- `orderNumber`—Order number of the order summary.
- `orderSummaryId`—ID of the order summary.
- `orderedDate`—Ordered date of the order summary.
- `ownerId`—ID of the owner of the order summary.
- `status`—Status of the order summary.
- `totalAmount`—Total amount of the order summary.

Order Summary Collection

This new response body has these properties.

- `count`—Total count of order summaries returned on the current page.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `orderSummaries`—Collection of order summaries.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.
- `sortOrder`—Sort order for order summaries. Values are:
  - `CreatedDateAsc`—Sorts by the oldest created date.
  - `CreatedDateDesc`—Sorts by the most recent created date.
  - `OrderedDateAsc`—Sorts by the oldest ordered date.
  - `OrderedDateDesc`—Sorts by the most recent ordered date.

Product Attribute Info (Generally Available)

This response body has these properties.

- `allowableValues`—Allowable values for the attribute.
- `apiName`—API name of the attribute.
- `availableValues`—Attribute values that are available for the 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 (Generally Available)

This 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 (Generally Available)

This 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 (Generally Available)

This 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 for the product.

Product Attribute Set Summary (Generally Available)

This 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 (Generally Available)

This 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 (Generally Available)

This response body has these properties.

- `canonicalKey`—Attribute API values concatenated with an underscore (_) 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 generally available properties.

- `attributeSetInfo`—Map of the attribute set developer name to its metadata.
- `productClass`—Class of product. Values are:
  - `Simple`
  - `Variation`
  - `VariationParent`
- `variationAttributeSet`—Variation attribute set for the product.

- `variationInfo`—Available and allowable values for variation attributes and a map to resolve variation product IDs from attribute value combinations.
- `variationParentId`—ID of the variation parent.

Product Summary

This response body has these generally available properties.

- `productClass`—Class of product. Values are:
  - `Simple`
  - `Variation`
  - `VariationParent`
- `variationAttributeSet`—Variation attribute set that is associated with the product.

Product Variation Info (Generally Available)

This response body has these properties.

- `attributesToProductMappings`—Map of the attribute value combinations to the variation product ID.
- `variationAttributeInfo`—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` value (generally available).

Chatter

Call Collaboration Capability

This new response body has these properties.

- `commentEndTime`—End time of the comment on the media player, in seconds.
- `commentStartTime`—Start time of the comment on the media player, in seconds.

Feed Element Capabilities

This response body has this new property.

- `callCollaboration`—If a feed element has this capability, it has a recording comment.

CMS Managed Content

Managed Content Media Node Value

This response body has this new property.

- `contentKey`—Content key of the managed content.

Managed Content Version

This response body has this new property.

- `contentKey`—Content key of the managed content.

Managed Content Search Result

This response body has this new property.

- `contentKey`—Content key of the managed content.

Conversations

Conversation Bulk Upload

This new response body has these properties.

- `conversationIdentifier`—Identifier for the conversation.
- `errorDetail`—If the upload failed, the reason it failed.
- `status`—Status of the upload attempt.
- `uploadId`—Upload ID for the conversation.

Conversation Bulk Uploads

This new response body has this property.

- `conversationBulkUploadsResults`—List of conversation bulk upload results.

Conversation Bulk Upload Status

This new response body has these properties.

- `conversationId`—ID of the conversation.
- `errorDetail`—Error detail for the conversation.
- `failedEntryCount`—Number of failed entries for the conversation.
- `failedEntryIds`—List of failed conversation entry IDs for the conversation.
- `lastUpdatedTimestamp`—Timestamp for the last update of the conversation, in milliseconds.
- `status`—Status for the conversation upload request.
- `successEntryCount`—Number of successful entries for the conversation.
- `uploadId`—Upload ID for the conversation.

Conversation Bulk Upload Statuses

This new response body has this property.

- `conversationBulkUploadStatuses`—List of statuses for the bulk upload of conversations.

Conversation Entries

This new response body has this property.

- `conversationEntries`—List of conversation entries.

Conversation Entries Update

This new response body has this property.

- `conversationEntriesUpdateResults`—List of conversation entry update results.

Conversation Entry

This new response body has these properties.

- `clientDuration`—Client duration for the conversation entry, in milliseconds.
- `clientTimestamp`—Client timestamp for the conversation entry, in milliseconds.
- `identifier`—Identifier for the conversation entry.
- `messageText`—Message text for the conversation entry. This text is returned only for message entry types containing static content messages of text type.
- `sender`—Sender for the conversation entry.
- `serverReceivedTimestamp`—Server received timestamp for the conversation entry, in milliseconds.

Conversation Entry Update

This new response body has these properties.

- `failureReason`—If the update failed, the reason it failed.
- `identifier`—Identifier for the updated conversation entry.
- `success`—Specifies whether the status of the update attempt is success (`true`) or not (`false`).

Conversation Participant

This new response body has these properties.

- `appType`—App type for the participant.
- `role`—Role for the participant.
- `subject`—Subject for the participant.

Field Service

Shifts from Pattern

This new response body has these properties.

- `count`—Total count of created shifts.
- `recordIds`—Collection of created shift IDs.

Order Management and Omnichannel Inventory

Available Location Output

This new response body has this property.

- `locations`—A list of inventory locations.

Average Distance Result Output

This new response body has this property.

- `distanceCalculation`—Results of the shipping distance calculations.

Distance Calculation Output

This new response body has these properties.

- `averageDistance`—The average distance from the locations to the order recipient.
- `locations`—The list of locations and their distances to the order recipient.
- `rank`—This result's rank among all results by average distance to the order recipient.

Find Routes With Fewest Splits Output

This new response body has this property.

- `targetLocations`—Each element of the list is a set of inventory locations that together can fulfill the order being routed.

Fulfillment Group Output

This new response body has these properties.

- `fulfilledFromLocationId`—(Creation failed) The input FulfilledFromLocationId.
- `fulfillmentOrderId`—The FulfillmentOrderId from the successfully created FulfillmentOrder.
- `fulfillmentType`—(Creation failed) The input FulfillmentType.
- `orderDeliveryGroupSummaryId`—(Creation failed) The input OrderDeliveryGroupSummaryId.
- `orderItemSummaries`—(Creation failed) The input list of OrderItemSummaries.
- `orderSummaryId`—(Creation failed) The input OrderSummaryId.
- `referenceId`—The referenceId from the FulfillmentGroup input representation.

Available Location Output

This new response body has this property.

- `locations`—A list of inventory locations.

Average Distance Result Output

This new response body has this property.

- `distanceCalculation`—Results of the shipping distance calculations.

Distance Calculation Output

This new response body has these properties.

- `averageDistance`—The average distance from the locations to the order recipient.
- `locations`—The list of locations and their distances to the order recipient.
- `rank`—This result's rank among all results by average distance to the order recipient.

Find Routes With Fewest Splits Output

This new response body has this property.

- `targetLocations`—Each element of the list is a set of inventory locations that together can fulfill the order being routed.

Fulfillment Group Output

This new response body has these properties.

- `fulfilledFromLocationId`—(Creation failed) The input FulfilledFromLocationId.
- `fulfillmentOrderId`—The FulfillmentOrderId from the successfully created FulfillmentOrder.
- `fulfillmentType`—(Creation failed) The input FulfillmentType.
- `orderDeliveryGroupSummaryId`—(Creation failed) The input OrderDeliveryGroupSummaryId.
- `orderItemSummaries`—(Creation failed) The input list of OrderItemSummaries.
- `orderSummaryId`—(Creation failed) The input OrderSummaryId.
- `referenceId`—The referenceId from the FulfillmentGroup input representation.

Payments

Authorization Adjustment Output

This new response body has these properties.

- `accountID`—ID of the account containing the payment authorization being adjusted.
- `amount`—Amount of the payment authorization adjustment.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment authorization adjustment.
- `effectiveDate`—Date when the authorization adjustment becomes effective.
- `id`—ID of the PaymentAuthAdjustment record.
- `paymentAuthAdjustmentNumber`—System-defined reference number.
- `requestDate`—Date when the authorization adjustment transaction occurred.
- `status`—Status of the payment authorization adjustment.

Authorization Reversal Output

This new response body has these properties.

- `error`—Error response representation for the authorization reversal.
- `gatewayResponse`—Gateway response representation for the authorization reversal.
- `paymentAuthAdjustment`—Payment authorization adjustment response representation for the authorization reversal.

- `paymentGatewayLogs`—Gateway log collection representation for the authorization reversal.

Authorization Reversal Gateway Response Output

This new response body has these properties.

- `gatewayAvsCode`—Gateway AVS code.
- `gatewayDate`—Gateway date.
- `gatewayMessage`—Message returned by the gateway.
- `gatewayReferenceDetails`—Gateway reference details.
- `gatewayReferenceNumber`—Gateway reference number.
- `gatewayResultCode`—Gateway result code.
- `gatewayResultCodeDescription`—Gateway result code description.
- `salesforceResultCode`—Salesforce result code.

Payment Method Tokenization Output

This new response body has these properties.

- `error`—Error response following a failed payment method tokenization request.
- `gatewayResponse`—Gateway response following a payment method tokenization request.
- `paymentGatewayLogs`—Payment gateway logs following a payment method tokenization request.
- `paymentMethod`—Payment method representation for payment method tokenization request.

Payment Method Tokenization Gateway Output

This new response body has these properties.

- `gatewayAvsCode`—Gateway AVS code.
- `gatewayDate`—Gateway date.
- `gatewayMessage`—Message returned by the gateway.
- `gatewayResultCode`—Gateway result code.
- `gatewayResultCodeDescription`—Gateway result code description.
- `gatewayToken`—Payment method token from the payment gateway.
- `salesforceResultCode`—Salesforce result code.

Personalization

Audience Target Assignment

This response body has this new property.

- `formulaScope`—Formula scope of the target.

Private Connect

AWS Inbound Network Connection Properties

This new response body has these properties.

- `awsVpcEndpointId`—VPC endpoint ID of the AWS inbound network connection.
- `region`—Cloud region of the AWS inbound network connection.

AWS Outbound Network Connection Properties

This new response body has these properties.

- `awsVpcEndpointId`—VPC endpoint ID of the AWS outbound network connection.

- `awsVpcEndpointServiceName`—VPC endpoint service name of the AWS outbound network connection.
- `region`—Cloud region of the AWS outbound network connection.

Network Connection

This new response body has these properties.

- `connectionProperties`—Property names and values of the network connection.
- `connectionType`—Type of network connection. Value is `AwsPrivateLink`.
- `description`—Description of the network connection.
- `developerName`—Name of the network connection.
- `id`—ID of the network connection.
- `isActive`—Specifies whether the network connection is active (`true`) or not (`false`).
- `masterLabel`—Master label of the network connection.
- `namespacePrefix`—Namespace prefix of the network connection.
- `status`—Status of the network connection. Values are:
  - `Allocating`
  - `DeletedRemotely`
  - `PendingAcceptance`
  - `PendingActivation`
  - `Ready`
  - `RejectedRemotely`
  - `TeardownInProgress`
  - `Unprovisioned`

Order Management

Available Location Output

This new response body has this property.

- `locations`—A list of inventory locations.

Average Distance Result Output

This new response body has this property.

- `distanceCalculation`—Results of the shipping distance calculations.

Distance Calculation Output

This new response body has these properties.

- `averageDistance`—The average distance from the locations to the order recipient.
- `locations`—The list of locations and their distances to the order recipient.
- `rank`—This result's rank among all results by average distance to the order recipient.

Find Routes With Fewest Splits Output

This new response body has this property.

- `targetLocations`—Each element of the list is a set of inventory locations that together can fulfill the order being routed.

Fulfillment Group Output

This new response body has these properties.

- **fulfilledFromLocationId**—(Creation failed) The input FulfilledFromLocationId.
- **fulfillmentOrderId**—The FulfillmentOrderId from the successfully created FulfillmentOrder.
- **fulfillmentType**—(Creation failed) The input FulfillmentType.
- **orderDeliveryGroupSummaryId**—(Creation failed) The input OrderDeliveryGroupSummaryId.
- **orderItemSummaries**—(Creation failed) The input list of OrderItemSummaries.
- **orderSummaryId**—(Creation failed) The input OrderSummaryId.
- **referenceId**—The referenceId from the FulfillmentGroup input representation.

Location Output
This new response body has these properties.

- **distance**—The distance from the location to the order recipient.
- **locationIdentifier**—The location identifier.

Multiple Fulfillment Order Output
This new response body has this property.

- **fulfillmentOrders**—A list of response data for created and failed FulfillmentOrders.

Order Item Summary Output
This new response body has these properties.

- **errors**—List of errors specific to the OrderItemSummary, if any.
- **orderItemSummaryId**—ID of the OrderItemSummary.
- **quantity**—Quantity of the OrderItemSummary.

Rank Average Distance Output
This new response body has these properties.

- **distanceUnit**—The specified unit of distance (miles or kilometers).
- **results**—The results of the shipping distance calculations.

Omnichannel Inventory

OCI Create Reservation Error Output
This new response body has these properties.

- **errorCode**—The error code.
- **message**—Details of the error, if available.

OCI Create Reservation Output
This new response body has these properties.

- **details**—Details for each product in the reservation.
- **errors**—Any errors returned by the reservation request.
- **expirationTime**—The time at which the reservation would expire.
- **reservationTime**—The time when the reservation was recorded.
- **success**—Indicates whether the reservation was successfully created.

OCI Create Reservation Single Output
This new response body has these properties.

- **errorCode**—The error code, if any.
- **locationGroupIdentifier**—Identifier of the location group where the inventory is reserved.

- `locationIdentifier`—Identifier of the location where the inventory is reserved.
- `quantity`—The reserved quantity of the product.
- `stockKeepingUnit`—The SKU of the reserved product.

OCI Fulfill Reservation Error Output

This new response body has these properties.

- `details`—Details of the fulfilled reservation, if successful.
- `errorCode`—Error code, if any.
- `message`—Details of the error, if available.

OCI Fulfill Reservation Output

This new response body has these properties.

- `errors`—Responses for the individual reservations in the fulfillment request.
- `success`—Indicates whether the request was successful.

OCI Fulfill Reservation Single Output

This new response body has these properties.

- `actionRequestId`—The UUID that identifies the original fulfill reservation request.
- `externalRefId`—The external reference ID of the location that fulfilled the reservation.
- `locationIdentifier`—The identifier of the location that fulfilled the reservation.
- `quantity`—The fulfilled quantity.
- `stockKeepingUnit`—The SKU of the fulfilled product.

OCI Future Inventory Output

This new response body has these properties.

- `expectedDate`—Date when the future inventory is expected.
- `quantity`—Quantity of the future inventory.

OCI Get Inventory Availability Output

This new response body has these properties.

- `locationGroups`—A list of inventory availability data for individual location groups.
- `locations`—A list of inventory availability data for individual locations.

OCI Inventory Record Output

This new response body has these properties.

- `availableToFulfill`—The Available To Fulfill quantity.
- `availableToOrder`—The Available To Order quantity.
- `effectiveDate`—The effective date of the inventory.
- `futures`—A list of any expected future inventory restocks.
- `onHand`—The On Hand quantity.
- `reserved`—The Reserved quantity.
- `safetyStockCount`—The Safety Stock Count.
- `stockKeepingUnit`—The SKU of the product.

OCI Location Availability Output

This new response body has these properties.

- `inventoryRecords`—A list of availability data for individual products at this location.

- `locationIdentifier`—The identifier of the location.

OCI Location Group Availability Output

This new response body has these properties.

- `inventoryRecords`—A list of availability data for individual products. The data combines the quantities for all locations belonging to this location group.
- `locationGroupIdentifier`—The identifier of the location group.

OCI Publish Location Structure Output

This new response body has this property.

- `uploadId`—Identifier of the publish job. Use this value to retrieve the status of the job.

OCI Publish Location Structure Status Output

This new response body has these properties.

- `endTimeUTC`—The UTC time when the job finished. (for example: "2020-07-06T22:54:08.012Z")
- `recordsProcessedCount`—The number of records processed by the job.
- `recordsReadCount`—The number of records read by the job.
- `recordsSkippedCount`—The number of records skipped by the job.
- `startTimeUTC`—The UTC time when the job started. (for example: "2020-07-06T22:53:06.788Z")
- `status`—The status of the job. (e.g., "PENDING," "COMPLETED," etc.).
- `uploadId`—Identifier of the job.
- `validationErrors`—List of any validation errors returned by the job.
- `validationStatus`—The validation status of the job.

OCI Release Reservation Error Output

This new response body has these properties.

- `details`—Details of the released reservation, if successful.
- `errorCode`—Error code, if any.
- `message`—Details of the error, if available.

OCI Release Reservation Output

This new response body has these properties.

- `errors`—Responses for the individual reservations in the release request.
- `success`—Indicates whether the request was successful.

OCI Release Reservation Single Output

This new response body has these properties.

- `actionRequestId`—The UUID that identifies the original release reservation request.
- `externalRefId`—The external reference ID of the location that released the reservation.
- `locationGroupIdentifier`—The identifier of the location group that released the reservation.
- `locationIdentifier`—The identifier of the location that released the reservation.
- `quantity`—The released quantity.
- `stockKeepingUnit`—The SKU of the released product.

OCI Transfer Reservation Error Output

This new response body has these properties.

- `details`—Details of the transferred reservation, if successful.

- `errorCode`—Error code, if any.
- `message`—Details of the error, if available.

OCI Transfer Reservation Output

This new response body has these properties.

- `errors`—Responses for the individual reservations in the transfer request.
- `success`—Indicates whether the request was successful.

OCI Transfer Reservation Single Output

This new response body has these properties.

- `actionRequestId`—The UUID that identifies the original transfer reservation request.
- `externalRefId`—The external reference ID of the location that received the reservation.
- `fromLocationGroupIdentifier`—The identifier of the location group that sent the reservation.
- `fromLocationIdentifier`—The identifier of the location that sent the reservation.
- `quantity`—The quantity of transferred inventory.
- `stockKeepingUnit`—The SKU of the transferred product.
- `toLocationGroupIdentifier`—The identifier of the location group that received the reservation.
- `toLocationIdentifier`—The identifier of the location that received the reservation.

OCI Upload Inventory Availability Output

This new response body has this property.

- `uploadId`—Identifier of the upload job. Use this value to retrieve the status of the job.

OCI Upload Inventory Availability Status Output

This new response body has these properties.

- `endTimeUTC`—The UTC time when the job finished. (for example: "2020-07-06T22:54:08.012Z")
- `recordsProcessedCount`—The number of records processed by the job.
- `recordsReadCount`—The number of records read by the job.
- `recordsSkippedCount`—The number of records skipped by the job.
- `startTimeUTC`—The UTC time when the job started. (for example: "2020-07-06T22:53:06.788Z")
- `status`—The status of the job. (e.g., "PENDING," "COMPLETED," etc.).
- `uploadId`—Identifier of the job.
- `validationErrors`—List of any validation errors returned by the job.
- `validationStatus`—The validation status of the job.

Tableau CRM REST API

Retrieve information on Analytics limits using the Tableau CRM REST API. Retrieve and revert recipe history records. Experience improved filtering for dataflow jobs.

IN THIS SECTION:

New and Changed Tableau CRM REST API Resources
These resources are new or have changes.

New and Changed Tableau CRM REST API Request Bodies
These request bodies are new or have changes.

New and Changed Tableau CRM REST API Resources

These resources are new or have changes.

Get Analytics limits

Make a GET request to the new `/wave/limits` resource. Request parameters can be used to filter the results.

Get a recipe historical record

Make a GET request to the `/wave/recipes/`*`recipeId`* resource with the new `historyId` request parameter.

Revert a recipe to a previous historical record

Make a PUT request to the `/wave/recipes/`*`recipeId`* resource with a `AssetRevertHistoryInputRepresentation` resource.

Get dataflow jobs by license type

Make a GET request to the `/wave/dataflowjobs/` resource with the new `licenseType` request parameter. Valid values are: `EinsteinAnalytics` and `Sonic`.

Get dataflow jobs by status

Make a GET request to the `/wave/dataflowjobs/` resource with the new `status` request parameter.

Get dataflow jobs using search terms

Make a GET request to the `/wave/dataflowjobs` resource with the new `q` request parameter.

Get a query by query source

Make a GET request to the `/wave/query` resource with the new `querySource` request parameter.

New and Changed Tableau CRM REST API Request Bodies

These request bodies are new or have changes.

Component Saved View Input (ComponentSavedViewInputRepresentation)

The new request body has these new properties.

- `pageId` - The id of the component page for the saved view.
- `state` - The selections and filters applied to the component in the saved view.

Component Saved View State Input (ComponentSavedViewStateInputRepresentation)

The new request body has these new properties.

- `datasets` - A map of the fully qualified dataset names to the dataset states.
- `steps` - A map of the step ids to the step states.

Component Widget Parameters Input (ComponentWidgetParametersInputRepresentation)

The request body has these new properties.

- `shareState` - Indicates whether the component state is shared with the parent dashboard (`true`) or not (`false`).
- `attributes` - The collection of values of component's attributes.
- `step` - The step for the component.

Dashboard Input (DashboardInputRepresentation)

The request body has this new property.

- `visibility` - Indicates whether the dashboard is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Dashboard Saved View Input (DashboardSavedViewInputRepresentation)

The request body has this new property.

- `visibility` - Indicates whether the dashboard saved view is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Dataset Input (DatasetInputRepresentation)

The request body has this new property.

- `visibility` - Indicates whether the dataset is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Lens Input (LensInputRepresentation)

The request body has this new property.

- `visibility` - Indicates whether the lens is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Number Widget Parameters Input (NumberWidgetParametersInputRepresentation)

The request body has this new property.

- `tooltip` - The tooltip for this widget.

Recipe Input (RecipeInputRepresentation)

The request body has these new properties.

- `historyLabel` - An optional history label to tag the recipe version being saved.
- `licenseAttributes` - Optional license attributes to tag to the recipe being saved.

Recipe Name Label Input (RecipeNameLabelInputRepresentation)

The new request body has these properties.

- `label` - The label for the recipe node.
- `name` - The name for the recipe node.

Recipe Node Input (RecipeNodeInputRepresentation)

The new request body has these properties.

- `action` - The recipe node type. Valid values are: `Aggregate`, `Append`, `Append_V2`, `Bucket`, `Clustering`, `ComputeRelative`, `DateFormatConversion`, `DetectSentiment`, `DiscoveryPredict`, `Export`, `Extract`, `Filter`, `Flatten`, `Formula`, `Join`, `Load`, `OutputExternal`, `PredictMissingValues`, `Save`, `Schema`, `Split`, `SqlFilter`, `TimeSeries`, and `TypeCast`.
- `schema` - The schema changes for the node.
- `sources` - A list of source node ids.

Each recipe node action has unique request representations that are extensions of the base `RecipeNodeInputRepresentation`. The full developer guide details these representations.

Recipe Type Name Input (RecipeTypeNameInputRepresentation)

The new request body has these properties.

- `label` - The label for the recipe type.
- `name` - The name for the recipe type.

SQL Step Input (SqlStepInputRepresentation)

The new request body has these properties.

- `broadcastFacet` - Indicates whether the step broadcasts faceting (`true`) or not (`false`).
- `connectionName` - The name of the connection used for querying external data.

Tooltip Content Input (TooltipContentInputRepresentation)

The new request body has these properties.

- `body` - The visualization content for the tooltip.
- `description` - The text content for the tooltip.

Tooltip Input (TooltipInputRepresentation)

The new request body has these properties.

- `content` - The content for the tooltip.
- `customizeTooltip` - Indicates whether the tooltip is customized (`true`) or not (`false`).

Tooltip Source Input (TooltipSourceInputRepresentation)

The new request body has these properties.

- `name` - The name of the tooltip source.
- `namespace` - The namespace of the tooltip source.
- `type` - The type of the tooltip source. Supported value is: `Step`.

Tooltip Visualization Input (TooltipVisualizationInputRepresentation)

The new request body has these properties.

- `height` - The height of the tooltip source.
- `source` - The source for the displayed tooltip visualization.
- `width` - The width of the tooltip source.

New and Changed Tableau CRM REST API Response Bodies

These response bodies are new or have changes.

Component Saved View (ComponentSavedViewRepresentation)

The new response body has these new properties.

- `pageId` - The id of the component page for the saved view.
- `state` - The selections and filters applied to the component in the saved view.

Component Saved View State (ComponentSavedViewStateRepresentation)

The new response body has these new properties.

- `datasets` - A map of the fully qualified dataset names to the dataset states.
- `steps` - A map of the step ids to the step states.

Component Widget Parameters (ComponentWidgetParametersRepresentation)

The response body has these new properties.

- `shareState` - Indicates whether the component state is shared with the parent dashboard (`true`) or not (`false`).
- `attributes` - The collection of values of component's attributes.

- `step` - The step for the component.

Dashboard (DashboardRepresentation)

The response body has this new property.

- `visibility` - Indicates whether the dashboard is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Dashboard Saved View (DashboardSavedViewRepresentation)

The response body has this new property.

- `visibility` - Indicates whether the dashboard saved view is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Dataflow Job (DataflowJobRepresentation)

The response body has this new property.

- `licenseAttributes` - Optional license attributes to tag to the recipe being saved.

Dataflow Job Collection (DataflowJobCollectionRepresentation)

The response body has these new properties.

- `nextPageUrl` - The URL to get to the next page of jobs in the collection.
- `totalSize` - The total count of dataflow jobs in the collection, irrespective of the page.

Dataset (DatasetRepresentation)

The response body has this new property.

- `visibility` - Indicates whether the dataset is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Lens (LensRepresentation)

The response body has this new property.

- `visibility` - Indicates whether the lens is hidden from users with view access or not. Valid values are: `All` and `Limited`.

Link Mass Action Destination (LinkMassActionDestinationRepresentation)

The new response body has these properties.

- `actionName` - The name of the action.
- `field` - The field name for the action.
- `step` - The step to invoke the action on.

Number Widget Parameters (NumberWidgetParametersRepresentation)

The response body has this new property.

- `tooltip` - The tooltip for the widget.

Recipe (RecipeRepresentation)

The response body has these new properties.

- `historiesUrl` - The URL for the version histories for the recipe.
- `licenseType` - The Analytics license type for the recipe.

Recipe Definition (RecipeDefinitionRepresentation)

The response body has this updated property.

- `nodes` - A collection of `RecipeNodeRepresentation` objects.

Recipe Name Label (RecipeNameLabelRepresentation)

The new response body has these properties.

- `label` - The label for the recipe node.
- `name` - The name for the recipe node.

Recipe Node (RecipeNodeRepresentation)

The new response body has these properties.

- `action` - The recipe node type. Valid values are: `Aggregate`, `Append`, `Append_V2`, `Bucket`, `Clustering`, `ComputeRelative`, `DateFormatConversion`, `DetectSentiment`, `DiscoveryPredict`, `Export`, `Extract`, `Filter`, `Flatten`, `Formula`, `Join`, `Load`, `OutputExternal`, `PredictMissingValues`, `Save`, `Schema`, `Split`, `SqlFilter`, `TimeSeries`, and `TypeCast`.
- `schema` - The schema changes to node output.
- `sources` - A list of source input nodes.

Each recipe node action has unique response representations that are extensions of the base `RecipeNodeRepresentation`. The full developer guide details these representations.

SQL Step (SqlStepRepresentation)

The new response body has these properties.

- `broadcastFacet` - Indicates whether the step broadcasts faceting (`true`) or not (`false`).
- `connectionName` - The name of the connection used for querying external data.
- `query` - The query for the step.
- `start` - The start value for the step.
- `visualizationParameters` - The visualization parameters for the step.

Tooltip Content (TooltipContentRepresentation)

The new response body has these properties.

- `body` - The visualization content for the tooltip.
- `description` - The text content for the tooltip.

Tooltip (TooltipRepresentation)

The new response body has these properties.

- `content` - The content for the tooltip.
- `customizeTooltip` - Indicates whether the tooltip is customized (`true`) or not (`false`).

Tooltip Source (TooltipSourceRepresentation)

The new response body has these properties.

- `name` - The name of the tooltip source.
- `namespace` - The namespace of the tooltip source.
- `type` - The type of the tooltip source. Supported value is: `Step`.

Tooltip Visualization (TooltipVisualizationRepresentation)

The new response body has these properties.

- `height` - The height of the tooltip source.
- `source` - The source for the displayed tooltip visualization.

- `width` - The width of the tooltip source.

Unsupported Record (UnsupportedRecordRepresentation)

The response body has this new property.

- `descriptorCount` - The number of descriptors for the record.

Wave Features (WaveFeaturesRepresentation)

The response body has this new property.

- `canUseDataPrepPilot` - Indicates whether the data prep pilot preference is enabled (`true`) or not (`false`).

User Interface API

Get the save options for a record layout.

Get the save options for a record layout

The new `saveOptions` property on the Record Layout response body returns a list of save options for the record layout. Save options define behavior that occurs when objects are created or modified using the given layout.

Send an email notification when a Case or CaseComment is created or updated

Use the new `triggerOtherEmail` and `triggerUserEmail` request parameters when creating or updating a record via `/ui-api/records` and `/ui-api/records/{recordId}`.

Use `triggerOtherEmail` to specify whether to send email to users outside the organization. In the Salesforce user interface, this email can be triggered by creating, editing, or deleting a contact for a Case.

Use `triggerUserEmail` to specify whether to send email to users in the organization. In the Salesforce user interface, this email can be triggered by resetting a password, creating a user, or adding comments to a Case.

Specify an assignment rule when creating or updating an Account, Case, or Lead

Use the new `useDefaultRule` request parameter when creating or updating a record via `/ui-api/records` and `/ui-api/records/{recordId}`.

For a Case or Lead, specifies whether to use the default (`active`) assignment rule. For an Account, specifies whether to apply all territory assignment rules when updating the Account.

Get the field API name and list of object API names for a related list

The new `fieldApiName` and `objectApiNames` properties on the Related List Info response body return more information about the related list.

Supported Objects

These objects are now supported by most User Interface API resources. List views resources and most recently used (MRU) list views resources support a smaller set of objects, which are listed below.

- AiVisitTaskRcmd
- AiVisitTaskRcmdRequest
- AppExtension
- ApplicationCase
- AssessmentTaskDefinition
- AssessmentTaskIndDefinition
- BusinessHours
- CareProviderAdverseAction
- CareSpecialtyTaxonomy
- ClaimCoverage

- ClaimCoveragePaymentDetail
- ClaimCoverageReserveDetail
- ClaimCovPaymentAdjustment
- ClaimCovReserveAdjustment
- ClaimPaymentSummary
- DataStream
- FieldServiceMobileExtension
- FieldServiceMobileSettings
- ForecastingOwnerAdjustment
- Holiday
- InsurancePolicySurcharge
- InsurancePolicyTransaction
- Interaction
- InteractionAttendee
- InteractionSummary
- InteractionSummaryParticipant
- LiveChatTranscript
- MobileSettingsAssignment
- OmniDataTransform
- OmniDataTransformItem
- OmniProcess
- OmniProcessCompilation
- OmniProcessElement
- OmniScriptSavedSession
- OmniUiCard
- OpportunityHistory
- ProducerCommission
- ProductConsumed
- ProductItem
- ProductItemTransaction
- ProductRequest
- ProductRequestLineItem
- ProductRequired
- ProductServiceCampaignItem
- RegulatoryTrxnFee
- RegulatoryTrxnFeeItem
- ShiftPatternEntry
- ShiftTemplate
- SkillLevelDefinition
- Survey

- SwarmRequest
- VehicleUserAssignment
- Voucher
- VoucherDefinition
- WebStore

List views resources now support these objects.

- AiVisitTaskRcmd
- AiVisitTaskRcmdRequest
- ApplicationCase
- AssessmentTaskDefinition
- CareProviderAdverseAction
- CareSpecialtyTaxonomy
- ClaimCoverage
- ClaimCoveragePaymentDetail
- ClaimCoverageReserveDetail
- ClaimCovPaymentAdjustment
- ClaimCovReserveAdjustment
- ClaimPaymentSummary
- InsurancePolicySurcharge
- InsurancePolicyTransaction
- Interaction
- InteractionAttendee
- InteractionSummary
- InteractionSummaryParticipant
- OmniDataTransform
- OmniDataTransformItem
- OmniProcess
- OmniProcessCompilation
- OmniProcessElement
- OmniScriptSavedSession
- OmniUiCard
- ProducerCommission
- ProductConsumed
- ProductItem
- ProductItemTransaction
- ProductRequest
- ProductRequestLineItem
- ProductRequired
- ProductServiceCampaignItem
- RegulatoryTrxnFee

- RegulatoryTrxnFeeItem

- ShiftPatternEntry

- ShiftTemplate

- SkillLevelDefinition

- Survey

- SwarmRequest

- VehicleUserAssignment

- Voucher

Most recently used (MRU) list views resources now support these objects.

- AiVisitTaskRcmd

- AiVisitTaskRcmdRequest

- ApplicationCase

- AssessmentTaskDefinition

- CareProviderAdverseAction

- CareSpecialtyTaxonomy

- ClaimCoverage

- ClaimCoveragePaymentDetail

- ClaimCoverageReserveDetail

- ClaimCovPaymentAdjustment

- ClaimCovReserveAdjustment

- ClaimPaymentSummary

- InsurancePolicySurcharge

- InsurancePolicyTransaction

- Interaction

- InteractionAttendee

- InteractionSummary

- InteractionSummaryParticipant

- OmniDataTransform

- OmniDataTransformItem

- OmniProcess

- OmniProcessCompilation

- OmniProcessElement

- OmniScriptSavedSession

- OmniUiCard

- ProducerCommission

- ProductConsumed

- ProductItem

- ProductItemTransaction

- ProductRequest

- ProductRequestLineItem

- ProductServiceCampaignItem
- RegulatoryTrxnFee
- RegulatoryTrxnFeeItem
- ShiftPatternEntry
- ShiftTemplate
- SkillLevelDefinition
- Survey
- SwarmRequest
- VehicleUserAssignment
- Voucher

Related list views resources now support these objects.

- Voucher
- VoucherDefinition

Bulk API and Bulk API 2.0

Extended coverage across more objects improves query performance.

Use twelve new PK-Chunking enabled objects with Bulk API and Bulk API 2.0
You can now request PK-chunking for Bulk API queries for the following objects. Bulk 2.0 makes the request automatically.

- B2BMktActivity
- B2BMktProspect
- Claim
- ClaimParticipant
- ContractLineItem
- CustomerProperty
- InsurancePolicy
- InsurancePolicyAsset
- InsurancePolicyParticipant
- ProductConsumed
- ProductRequired
- ServiceContract

For a complete list of PK-chunking supported objects, consult the Salesforce Developer Documentation.

Salesforce Bulk API Developer Guide: "PK Chunking Header"

Salesforce Bulk API 2.0 Developer Guide: "How Requests Are Processed"

Tooling API New and Changed Objects

Tooling API includes new and changed objects.

Mobile

Select records for specific users to view when they're offline in the Salesforce Field Service mobile app for iOS and Android
Use the BriefcaseDefinition object. Introduced in API version 50.0, this object has been added to the Tooling API Developer Guide.

Salesforce Surveys

Store information about Customer Lifecycle Maps
Use the `BusinessProcessGroup` object. Introduced in API version 51.0, this object was added to the Tooling API Developer Guide.

Store information about stages in Customer Lifecycle Maps
Use the `BusinessProcessDefinition` object. Introduced in API version 51.0, this object was added to the Tooling API Developer Guide.

Store information about the survey and the question associated with each stage in a Customer Lifecycle Map
Use the `BusinessProcessFeedback` object. Introduced in API version 51.0, this object was added to the Tooling API Developer Guide.

Store the configuration about the feedback collection method used to collect feedback
Use the `BusProcessFeedbackConfig` object. Introduced in API version 51.0, this object was added to the Tooling API Developer Guide.

Customization

Create and manage external data sources
Use the new ExternalDataSource and CustomHttpHeader objects to manage connection details for integration with data and content that are stored outside your Salesforce org.

Security and Identity

Create and manage named credentials
Use the new NamedCredential object to specify the URL of a callout endpoint and its required authentication parameters in one definition.

Get information about your Salesforce org's previous My Domain names and suffixes
Use the new MyDomainLog object.

Development

Set the batch size and the running user for a platform event Apex trigger
Use the new PlatformEventSubscriberConfig object to configure a platform event trigger.

Get information about the Salesforce version used to create the package version
Use the new `ReleaseVersion` field on the Package2Version object. This field is new in API version 51.0

Get information about the time it took to create a package version
Use the new `BuildDurationInSeconds` field on the Package2Version object. This field is new in API version 51.0

Metadata API

Metadata API includes new and changed types and fields.

Salesforce Overall

Add images to in-app guidance

Use the new `image`, `imageAltText`, and `imageLocation` fields on the PromptVersion subtype of the Prompt metadata type.

DEPRECATED: The `targetAppDeveloperName` and `targetAppNamespacePrefix` fields on the PromptVersion subtype of the Prompt metadata type are deprecated

The fields are deprecated in API version 51.0.

Mobile

Enable selected records to be available offline for specific users in the Salesforce Field Service mobile app for iOS and Android

Use the BriefcaseDefinition metadata type. Introduced in API version 50.0, this type has been added to the Metadata API Developer Guide.

Commerce

Turn on Salesforce Omnichannel Inventory and integrate it with Salesforce B2C Commerce

Use the new InventorySettings metadata type.

Create fulfillment orders for multiple order delivery groups in flows

Use the new `createFulfillmentOrders` action for Order Management from the `actionType` field on the FlowActionCall subtype of the Flow metadata type.

Evaluate ordered product quantities against available inventory to determine the smallest combination of locations that can fulfill the order in flows

Use the new `orderRoutingFindRoutesWithFewestSplits` action for Order Management from the `actionType` field on the FlowActionCall subtype of the Flow metadata type.

Calculate the average distance from sets of inventory locations to an order recipient, and return the sets sorted by that average distance in flows

Use the new `orderRoutingRankByAverageDistance` action for Order Management from the `actionType` field on the FlowActionCall subtype of the Flow metadata type.

Use Omnichannel Inventory features in flows

Use the new actions for Omnichannel Inventory from the `actionType` field on the FlowActionCall subtype of the Flow metadata type.

- Create inventory reservations with `ociCreateReservation`.
- Fulfill inventory reservations with `ociFulfillReservation`.
- Get inventory availability data with `ociGetAvailability`.
- Release inventory reservations with `ociReleaseReservation`.
- Transfer inventory reservations with `ociTransferReservation`.

Sales

Enable sending OrderStatusChangedEvent notifications for order status changes

Use the EnableOrderEvents setting in the OrderSettings metadata type.

Export ContractStatus fields from a Salesforce Developer Edition org when deploying to a new org Developer Edition org.

Use Metadata API to read and deploy the contract entity's ContractStatus field.

Service

Configure settings for an Einstein for Service feature

Use the ServiceAISetupDefinition metadata type.

Specify a case or article field for Einstein Article Recommendations

Use the ServiceAISetupField metadata type.

Add mobile worker time of arrival and tracking notifications to Field Service

Use the new `apptAssistantExpiration`, `apptAssistantInfoUrl`, `apptAssistantRadiusUnitValue`, `apptAssistantRadiusValue`, and `apptAssistantStatus` fields on the FieldServiceSettings metadata type.

Analytics

Enable New Analytics Features

Enable these features using these new fields on the AnalyticsSettings metadata type.

- Enable the Mobile Offline feature using the `enableOrgHasMobileOfflineEnabled` field.
- Enable the Hide the XLS Report feature on Lightning Experience Reports using the `enableReportHideXlsExportPref` field.
- Enable the Salesforce Output Connector using the `enableSalesforceOutputConnector` field.
- Enable SQL Live Datasets using the `enableSqlLiveDataset` field.
- Enable the Tableau Hyper Output Connector using the `enableTableauHyperOutputConnector` field.
- Enable the Sonic Feature using the `sonicEnabled` field.

REMOVED: These fields are removed from the AnalyticsSettings metadata type in API version 51.0

- `canSubscribeDashboardWidgets`
- `enablePowerInsights`
- `enableWaveTemplate`
- `enableSmartDataDiscovery`

Batch Management

Define Batch Management jobs to process data

Use the new BatchProcessJobDefinition metadata type.

Data Processing Engine

Transform data with a Data Processing Engine definition

Use the new BatchCalcJobDefinition metadata type.

Decision Table

Create decision table rules to process records

Use the new DecisionTable metadata type.

Define mapping definition for a decision table

Use the new DecisionTableDatasetLink metadata type.

Experience Cloud

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.

Control guest user access to a Build Your Own (LWR) site

Use the new `authenticationType` field in the `site_name`.json file in the config folder on the ExperienceBundle type.

REMOVED: The `enableWebruntimeBYOTemplate` field on the SiteSettings type is removed

The `enableWebruntimeBYOTemplate` field is removed in API version 51.0.

Salesforce Flow

Add scheduled paths to record-triggered flows

Use the new `scheduledPaths` field on the FlowStart metadata subtype of the Flow metadata type. To learn more, see Run Part of a Record-Triggered Flow After the Triggering Event on page 427 in Salesforce Release Notes.

Improve the layout of flow screens by using sections and columns to organize fields (beta)

Use these fields and values on the FlowScreenField subtype of the Flow metadata type. Previously a pilot, these fields and values are now beta.

- To specify that a screen field is a section, use the `RegionContainer` value of the `fieldType` field.
- To specify that a screen field in a section is a column, use the `Region` value of the `fieldType` field.
- To add a column to a section, or to add a screen field to a column, use the `fields` field.

For more information, see Build Multicolumn Screens in Flow Builder (Beta) on page 431 in Salesforce release notes.

Control revisited screen values in flows

Use the new `inputsOnNextNavToAssocScrn` field on the existing FlowScreenField metadata type. To learn more, see Control Revisited Screen Component Values in Flows in Salesforce Release Notes.

Set the transaction control for an action in screen flows

Use these new values on the FlowTransactionModel subtype of the Flow metadata type.

- To let a flow decide whether to automatically perform a callout action in either a new transaction or the currently running transaction, use the new `Automatic` value of the FlowTransactionModel field.
- To always start a new transaction for the action, use the new `NewTransaction` value of the FlowTransactionModel field.
- To always continue the running transaction for the action, use the new `CurrentTransaction` value of the FlowTransactionModel field.

To learn more, see Avoid Callout Errors in Screen Flows Automatically in Salesforce Release Notes.

Security and Identity

Automate Real-Time Event Monitoring setup by enabling or disabling streaming and storing for one or more real-time events

Use the new RealTimeEventSettings metadata type.

Require client secret for refresh token flows

Use the new `isSecretRequiredForRefreshToken` field on the ConnectedAppOauthConfig metadata subtype of the ConnectedApp metadata type.

Allow hybrid apps to directly obtain Lightning and content child sessions through the OAuth 2.0 hybrid app flows

Assign the new `Lightning` and `Content` scopes in the `scopes` field on the ConnectedAppOauthConfig metadata subtype of the ConnectedApp metadata type.

Retrieve and deploy Login Flow records

Use the new `loginFlows` field on the `Profile` Metadata type.

REMOVED: The `enableSetPasswordInApi` field on the SecuritySettings metadata type is removed

The `enableSetPasswordInApi` field is removed in API version 51.0.

Include instance names in Visualforce URLs when third-party cookies are blocked

Use the new `useStabilizedMyDomainHostnames` field on the existing MyDomainSettings metadata type.

Get your org's My Domain name and suffix

Query the new `MyDomainName` and `MyDomainSuffix` fields on the existing MyDomainSettings metadata type.

Determine if your org is on the Salesforce Edge Network

Query the new `useEdge` field on the existing MyDomainSettings metadata type.

REMOVED: The `securityCentralKillSession` field on the SessionSettings type is removed

The `securityCentralKillSession` field is removed in API version 51.0.

REMOVED: The `isTLSv12Required` field on the SecuritySettings type is removed

The `isTLSv12Required` field is removed in API version 51.0.

REMOVED: The `isTLSv12RequiredCommunities` field on the SecuritySettings type is removed

The `isTLSv12RequiredCommunities` field is removed in API version 51.0.

Define a default owner for records created by unauthenticated site guest users

Use the new `siteGuestRecordDefaultOwner` field on the CustomSite metadata type.

Development

Set the batch size and the running user for a platform event Apex trigger

Use the new PlatformEventSubscriberConfig type to configure a platform event trigger.

Use free platform cache capacity with AppExchange-certified and security-reviewed packages in Developer Edition orgs

Use the new allocatedPartnerCapacity field on the PlatformCachePartitionType metadata subtype of the PlatformCachePartition metadata type.

Retrieve information about AI apps in your org

Use the new AIApplication and AIApplicationConfig metadata types.

Retrieve information about machine learning predictions in your org

Use the new MLPredictionDefintion metadata type, the MLDataDefintion metadata type, and the MLFilter and MLField subtypes.

Salesforce CPQ and Billing API

Salesforce CPQ and Billing API contains new, changed, and deprecated capabilities in the Apex, REST, and SOAP CPQ and Billing APIs.

IN THIS SECTION:

[Salesforce CPQ API](#)

Salesforce CPQ API contains new, changed, and deprecated capabilities for the Apex, REST, and SOAP CPQ APIs.

Salesforce CPQ API

Salesforce CPQ API contains new, changed, and deprecated capabilities for the Apex, REST, and SOAP CPQ APIs.

Take advantage of more screen real estate with Salesforce CPQ's updated third-party configurator

The Salesforce CPQ configurator lets you add or remove options from your bundle products. With the Salesforce CPQ third-party configurator, you can launch your own configurator from the quote line editor. We've removed the padding from around the edges of the frame so that you have more space for your own layout. We also removed the **Cancel** button, giving you the freedom to design your own.

When renewing or amending a contract, indicate that the response contains the quote ID instead of the quote model

Use the new `returnOnlyQuoteId` flag in the ContractRenewer API, together with the new `AmendmentContext` class in the ContractAmender API.

Lightning Console JavaScript API

The Lightning Console JavaScript API includes new and updated methods that let you customize a Lightning console app and utility bar programmatically.

Where: These changes apply to Lightning Experience only.

Term

Description

Salesforce Anywhere

Say hello to the expanded Salesforce Anywhere, which now includes all the features you know and love from Quip for Customer 360. Learn about the latest updates to Salesforce Anywhere Beta features.

IN THIS SECTION:

When to Expect Salesforce Anywhere Features

See when you can start using new Salesforce Anywhere features and when other features are being retired.

Quip for Customer 360 Is Now Salesforce Anywhere Advanced

Salesforce Anywhere Advanced is designed to help your team make faster, smarter decisions in the context of your Salesforce data. Keep data at the center of your teamwork with live Salesforce data in your documents, spreadsheets, templates, and messages.

Get Up and Running Faster with Salesforce Anywhere Setup

Set up all Salesforce Anywhere features from a single page in Salesforce Setup. Existing Quip for Customer 360 customers can now manage their settings from the Salesforce Anywhere setup page instead of the Quip setup page. Customers with the Salesforce Anywhere Advanced and Salesforce Anywhere Beta can manage their settings from the Salesforce Anywhere setup page.

Share Your Company's Custom Templates at Scale (Template Library)

Publish your company-wide templates to the Template Library's company galleries from the Quip Admin Console. Company galleries make it easier to streamline and share your processes across your business.

Create a Document from Anywhere (Document Creation in Salesforce)

Create a document wherever you are in Lightning Experience and link it to a record. With the New Document global action, your users can take freeform notes in the context of their Salesforce data.

Make Your Templates Dynamic with Templated Salesforce Data Mentions

Use templated Salesforce data mentions to dynamically autofill your embedded templates based on the Salesforce record. Unlike manual mail merge syntax, your dynamic data mentions stay up to date even if the data changes in Salesforce.

Define Sections of a Template with Document Ranges

Add headings to your templates to create document ranges and see how your templates are structured. Now you can easily use your template's sections to create business processes and automation based on your range names.

Update Document Ranges, Lock Sections, and Export Documents to PDFs with Salesforce Flow

Streamline your document and template workflows with new actions in Salesforce Flow. Automatically add new content to a document based on defined document ranges. Lock document sections to keep them safe from accidental edits. Export your completed documents to PDFs.

Quip Slides Is Being Retired

Quip Slides is scheduled for retirement as of January 31, 2021. After the feature is retired, users can't create slides and existing slides are view-only.

Add Salesforce Data Mentions on iOS, See a Document's Linked Salesforce Records from the All Files View, and Other Enhancements

Get the enhanced Salesforce Anywhere experience in Quip.

Access Alerts More Easily in Lightning Experience (Beta)

Know when something changes in Salesforce and take action faster from the new Salesforce Anywhere Alerts icon (beta).

Subscribe to Alerts Faster (Beta)

Use subscription templates to define subscription parameters faster. Your users can customize the template criteria to get only the alerts that they want.

Hear the Salesforce Anywhere Message Tone (Beta)

Distinguish Salesforce Anywhere messages (beta) from other communications with the Salesforce Anywhere message sound. Hear the message sound when your users receive Salesforce Anywhere messages (beta).

Catch Up on Released Beta Features

Salesforce Anywhere Beta features include customized alerts, messaging, suggested actions, and more.

When to Expect Salesforce Anywhere Features

See when you can start using new Salesforce Anywhere features and when other features are being retired.

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

Feature	Date
New Salesforce Anywhere Setup	When the release goes live for your org
Alert Subscription Templates (Beta)	Salesforce Preview
Alert Icon in Lightning Experience (Beta)	Salesforce Preview
Salesforce Anywhere Message Tone in Lightning Experience (Beta)	When the release goes live for your org
New Document Global Action (Document Creation in Salesforce)	Salesforce Preview
Salesforce Flow Actions	Salesforce Preview
Slides Retirement	January 31, 2021
Document Ranges	Salesforce Preview
Dynamic Salesforce Data Mentions	End of February 2021
Company Galleries (Template Library)	End of March 2021

Feature	Date
Salesforce Data Mentions on iOS	End of February 2021
Salesforce Data Mention iOS Editing	End of March 2021
Salesforce Data Mentions Spreadsheet Support	End of January 2021
Custom Layouts for Salesforce Data Mentions	End of March 2021
Salesforce Search Filters in Quip	March 2021
Linked Salesforce Records in Navigation	February 2021
Document Linking Enhancements	March 2021
Folder Link Sharing	January 2021
Quip Color Palette	January 2021

Quip for Customer 360 Is Now Salesforce Anywhere Advanced

Salesforce Anywhere Advanced is designed to help your team make faster, smarter decisions in the context of your Salesforce data. Keep data at the center of your teamwork with live Salesforce data in your documents, spreadsheets, templates, and messages.

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

Why: Quip for Customer 360 is combining with Salesforce Anywhere to deliver even more features under the Salesforce Anywhere brand. You still see occasional references to Quip for Customer 360 in our product and documentation, but from now on, it's Salesforce Anywhere Advanced.

Get Up and Running Faster with Salesforce Anywhere Setup

Set up all Salesforce Anywhere features from a single page in Salesforce Setup. Existing Quip for Customer 360 customers can now manage their settings from the Salesforce Anywhere setup page instead of the Quip setup page. Customers with the Salesforce Anywhere Advanced and Salesforce Anywhere Beta can manage their settings from the Salesforce Anywhere setup page.

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

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan, Salesforce Anywhere Advanced, or Salesforce Anywhere Beta.

How: From Salesforce Setup, in the Quick Find box, enter `Salesforce Anywhere`, and then select **Salesforce Anywhere (Quip)**. Follow the guided steps.

Share Your Company's Custom Templates at Scale (Template Library)

Publish your company-wide templates to the Template Library's company galleries from the Quip Admin Console. Company galleries make it easier to streamline and share your processes across your business.
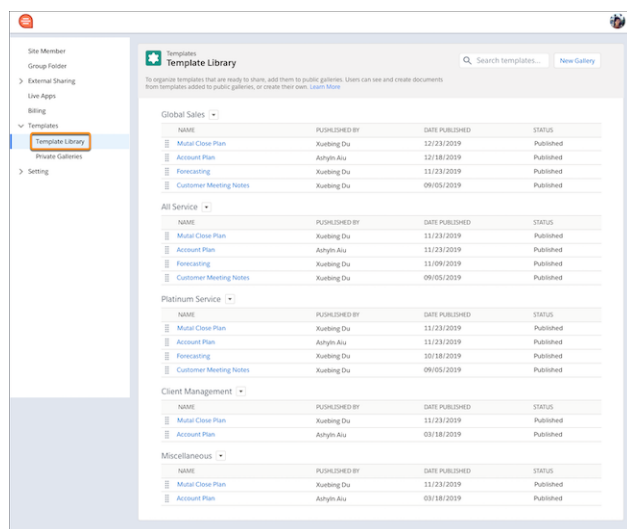
Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions.

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan, Quip Enterprise plan, or Salesforce Anywhere Advanced. Only Quip admins can publish templates to a public gallery.

Why: Create different company galleries to meet your business needs, such as one for Global Sales and another for Client Management, and then publish your custom templates to them. Your teams can easily find the templates that they need and know that they're admin-approved.

With Template Library management in the Quip Admin Console, you can see all your private templates, and when they're ready to share, publish them to company galleries. Your templates stay organized, and publishing and deleting templates is a breeze. You can even manage who has access to your private gallery templates.

How: Create company galleries from the Quip Admin Console and publish templates to them. Publishing a shared template to a company gallery removes the template from users' Shared with Me gallery.

Create a Document from Anywhere (Document Creation in Salesforce)

Create a document wherever you are in Lightning Experience and link it to a record. With the New Document global action, your users can take freeform notes in the context of their Salesforce data.

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

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

Why: Use the New Document global action to create a document without leaving your Salesforce page. Add all the things you know and love to your documents, like @mentions, Salesforce data mentions, and spreadsheets. When you're ready to share, link it to a Salesforce record and collaborate with your team.

How: From Publisher Layouts in Setup, add the New Document global action to your Salesforce Mobile and Lightning Experience Actions section.

Make Your Templates Dynamic with Templated Salesforce Data Mentions

Use templated Salesforce data mentions to dynamically autofill your embedded templates based on the Salesforce record. Unlike manual mail merge syntax, your dynamic data mentions stay up to date even if the data changes in Salesforce.

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

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

Why: Gone are the days of incorrect mail merge syntax and mail merge that doesn't line up with record fields. With dynamic Salesforce data mentions, templated fields added to an embedded template always align with an object's available fields and are always in sync with Salesforce.

Define Sections of a Template with Document Ranges

Add headings to your templates to create document ranges and see how your templates are structured. Now you can easily use your template's sections to create business processes and automation based on your range names.

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

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

Why: Use document range names to create your own automation APIs, or use Salesforce Flow to add content to a template based on a document range.

How: In a template, click the header menu, and select **Show Document Range**. To update content with Salesforce Flow based on a document range, use the Edit Document or Copy Content with Live Paste actions, and select a document range placement.
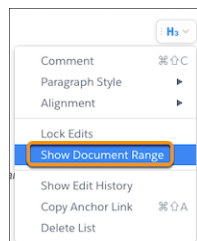
Update Document Ranges, Lock Sections, and Export Documents to PDFs with Salesforce Flow

Streamline your document and template workflows with new actions in Salesforce Flow. Automatically add new content to a document based on defined document ranges. Lock document sections to keep them safe from accidental edits. Export your completed documents to PDFs.

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

Who: Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

How: Beginning in Spring '21, Quip and Salesforce Anywhere actions are available in the Salesforce Anywhere section of Process Builder and Flow Builder.

Quip Slides Is Being Retired

Quip Slides is scheduled for retirement as of January 31, 2021. After the feature is retired, users can't create slides and existing slides are view-only.

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

Who: This change applies to Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

How: The Quip Slides retirement affects these features in Lightning Experience.

- You can't create slides from the Quip Document component or Quip Associated Documents component.
- You can't create a slide with the Create New Document action in Salesforce Flow.
- You can't insert a new slide or change a slide image with the Edit Document action in Salesforce Flow.
- You can't copy new slide content with the Copy Content action in Salesforce Flow.

Add Salesforce Data Mentions on iOS, See a Document's Linked Salesforce Records from the All Files View, and Other Enhancements

Get the enhanced Salesforce Anywhere experience in Quip.

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

Who: This change applies to Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

Why: Enhancements to Salesforce Anywhere (Quip) features include these.

- Insert and edit Salesforce Data Mentions from the Quip iOS app.
- Salesforce Data Mentions added to a document, chat room, or spreadsheet title are now searchable.
- Use Salesforce Data Mentions in spreadsheets when Mirrored Salesforce Permissions are enabled:
    - Add a Salesforce data mention to a formula.
    - Reference a cell with a Salesforce data mention.
- See the data that you care about with customized layouts for Salesforce data mentions.
    - Create custom record layouts on web, desktop, and iOS.
- Filter search results in Quip by a Salesforce object or record.
    - Use a Salesforce object or record filter in Search to find documents linked to a record.
    - Find documents with live apps or data mentions that reference a Salesforce record.
    - Make it easier to search for your Account Plans in Quip by filtering your documents by the Salesforce Account object type.
- See which Salesforce records a document is linked to from the All Files view in Quip.
    - Quickly scan a list of documents and see which ones are linked to Salesforce records.
- Link a document to a record from Quip more easily.
    - It's easier than ever to link a document to a record from the Salesforce Actions cloud.

- – View and manage your linked records in Quip.
- – Get smart recommendations for Salesforce records to link to your documents.

- Link share a folder.
  - – Make sharing folders in Quip easier with folder link sharing.

- Customize your Quip site's color palette.
  - – Use all your favorite Quip features in Dark or Light mode.
  - – Increase your color contrast.

Access Alerts More Easily in Lightning Experience (Beta)

Know when something changes in Salesforce and take action faster from the new Salesforce Anywhere Alerts icon (beta).

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

Note: Salesforce Anywhere Beta 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.

Who: Available in Salesforce orgs enrolled in the Salesforce Anywhere beta program. The Salesforce Anywhere Alerts icon (beta) is automatically available to any user assigned the Salesforce Anywhere in Lightning Experience permission set (beta).

Why: Access alerts with fewer clicks. Users no longer click the Salesforce Anywhere Messages icon (beta) to find out if the unread icon refers to messages or alerts.

How: From the Salesforce Anywhere Alerts icon (beta), review your alerts and take action when required.

Subscribe to Alerts Faster (Beta)

Use subscription templates to define subscription parameters faster. Your users can customize the template criteria to get only the alerts that they want.

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

Note: Salesforce Anywhere Beta 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.

Who: Available in Salesforce orgs enrolled in the Salesforce Anywhere beta program.

How: Start an alert subscription, and then select any subscription templates that include fields of interest.

To customize when alerts are generated, select **Edit**, and then adjust the criteria.

Hear the Salesforce Anywhere Message Tone (Beta)

Distinguish Salesforce Anywhere messages (beta) from other communications with the Salesforce Anywhere message sound. Hear the message sound when your users receive Salesforce Anywhere messages (beta).

Where: This feature is available in Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions.

> **Note:** Salesforce Anywhere Beta 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.

Who: Available in Salesforce orgs enrolled in the Salesforce Anywhere beta program.

Catch Up on Released Beta Features

Salesforce Anywhere Beta features include customized alerts, messaging, suggested actions, and more.

Where: These changes apply to Enterprise, Professional, Performance, Unlimited, and Developer editions. Platform availability is included with feature description.

> **Note:** Salesforce Anywhere Beta 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.

When: These features were released between July and November 2020.

Why: Previously released Salesforce Anywhere Beta features included:

- **November 2020**

  - **Choose Which Fields You See (Beta)**

    No more superfluous information! Your users can now choose the fields they see and the order the fields appear in when they view a certain record type. Available in Salesforce Anywhere iOS mobile app.

  - **See Your Most Used Fields (Beta)**

    Your users can now view fields that they frequently use even when they aren't assigned to the record layout. Available in Salesforce Anywhere iOS mobile app.

  - **Stay Productive with the Redesigned Mobile App (Beta)**

    The reimagined Salesforce Anywhere app has your productivity in mind. Get reordered tabs with a dedicated home page that shows recently used records and a highlighted Actions tab to encourage updates in Salesforce. Available in Salesforce Anywhere iOS mobile app.

- **October 2020**

  - **Tell Us What You Think of Salesforce Anywhere (Beta)**

    With the new in-app survey, users can rate the app and provide more details about their experience. The feedback helps us improve the product! Available in Salesforce Anywhere iOS mobile app.

  - **Get Reminders to Update Salesforce (Beta)**

    Users can configure alerts to remind them when fields of interest haven't changed in a specified time period. Available in Salesforce Anywhere iOS mobile app.

  - **Remember to Read a Chat Message Later (Beta)**

    Your users can keep track of chats that they want to return to later by marking them as unread. Available in Salesforce Anywhere iOS mobile app.

  - **Do More From a Record View on Mobile (Beta)**

No more switching between devices to accomplish Salesforce tasks. Now your users can access Salesforce actions, such as logging a new event, from the mobile record view. Available in Salesforce Anywhere iOS mobile app.

- **September 2020**

  - **Understand Your Setup Progress at a Glance (Beta)**

  The enhanced setup page now shows setup progress, displays misconfiguration warnings, and indicates how many of your users have permission to use Salesforce Anywhere on mobile and Lightning Experience. You can check your configuration at any time with a single click. Available in Lightning Experience.

  - **Easily Use Salesforce Anywhere with Actions on Page Layouts (Beta)**

  You can quickly access some Salesforce Anywhere capabilities, such as starting a chat or subscribing to alerts, from actions on record pages. The actions automatically appear on some standard and custom objects, and you can add the actions to other objects by modifying the page layout. Available in Lightning Experience.

  - **Create and Manage Subscriptions in Lightning Experience (Beta)**

  Now your users can create and manage subscriptions to records, lists, and reports in Lightning Experience. Users can choose what kinds of data changes send alerts, and change those parameters at any time. Available in Lightning Experience.

  - **Eliminate Extra Steps by Editing Records from Chat and Alerts (Beta)**

  No more switching tabs to update Salesforce data. Now users can edit a Salesforce record from inside Salesforce Anywhere chats and alerts. Available in Salesforce Anywhere iOS mobile app.

- **July 2020**

  - **Get Customized Alerts About Changes to Salesforce Data (Beta)**

  Users can choose which records, list views, or reports they want alerts for, and what kinds of changes they care about. To keep teammates in the loop, users can share an individual alert in a chat. Or users can forward the alert subscription to others so they can get the same alerts. Available in Lightning Experience and Salesforce Anywhere iOS mobile app.

  - **Chat with Teammates Inside Salesforce (Beta)**

  Gone are the days of bouncing between apps to discuss an opportunity or service case. With Salesforce Anywhere, users can chat with teammates and share and view Salesforce records—without ever leaving the app. Available in Lightning Experience and Salesforce Anywhere iOS mobile app.

  - **Keep Salesforce Data Up to Date (Beta)**

  With suggested actions, users see recommended actions that allow them to update the fields that are most important to them in just a few taps. Users can also easily log calls, create tasks, and update records. Available in Salesforce Anywhere iOS mobile app.

  - **Search and View Salesforce Data (Beta)**

  Take advantage of Salesforce Search even when you're away from your computer. Users can search all their Salesforce data, choose from results organized by object type, and review record details instantly. If users have access to multiple Salesforce orgs, they can switch between orgs. Available in Salesforce Anywhere iOS mobile app.

  - **Use Salesforce Anywhere Chat and Alerts in Your Processes and Flows (Beta)**

  Help users track their work in Salesforce and collaborate with relevant teammates using Salesforce Anywhere invocable actions in Salesforce Flow. Set up logic that uses actions to create a chat, add members or send a message to an existing chat, and send alerts to users. Available in Lightning Experience.

  - **Get Salesforce Anywhere Set Up in a Snap (Beta)**

To get your users up and running in record time, the setup experience is quicker and easier. Simplify user access with automatically created permission sets and use our embedded resources to introduce your users to Salesforce Anywhere across Lightning Experience and mobile. Available in Lightning Experience.

Pardot

Set up Pardot faster, maintain engagement data streams with First-Party Tracking, and enjoy enhanced functionality in email personalization, deliverability, and reporting. We improved clone actions too, so you can easily copy email content or new asset types associated to your campaigns.

IN THIS SECTION:

Campaigns and Assets

In Spring '21, find enhancements that support your account-based marketing efforts and streamline common tasks.

Email Marketing

Enhancements for email marketing in Spring '21 focus on email retention, performance analysis, and flexibility around reply-to and send-from addresses.

Analytics and Reporting

Pardot's prescriptive and predictive analytics features offer metrics you can trust and more flexibility than ever.

Protect Prospect Activity Data with First-Party Tracking (Generally Available)

Pardot's first-party tracking is now generally available. First-party tracking helps prevent the loss of prospect activity data, gives you more flexibility with campaign attribution, and blocks traffic that doesn't come from your domains. To protect consumer privacy, web browsers are moving away from supporting third-party cookies to track activity across assets and domains.

Access the Pardot Setup Assistant from the New Salesforce Marketing Setup App

Now you can find all the standard Pardot configuration tasks in one place, the Marketing Setup app. Setup for other Salesforce marketing tools plus improvements to the existing Pardot setup assistant are planned for upcoming releases.

Company Field in Pardot Dictates Business Unit Name in Pardot Account Setup

To avoid confusion, the Company name field in Pardot settings now acts as the source of truth for a given Pardot business unit. If there's a conflict with the business unit name in Salesforce setup, the Company name field in Pardot overwrites the name in Salesforce. Previously, a business unit could have a different name in Salesforce than in Pardot.

Sync Prospects Safely With Cross-Business Unit Leads and Contacts

A new setting on the Salesforce-Pardot connector stops Pardot package fields from syncing to lead and contact records in Salesforce. Use this setting as part of a custom setup to sync prospects from different Pardot business units to a single lead or contact in Salesforce. There's no need to maintain duplicate lead or contact records. We recommend working with a partner to implement this for your org.

Pardot API V5 Generally Available

Now you can use a new, standardized version of the Pardot API. Version 5 of the Pardot API offers new endpoints so you can manage custom redirects and import your own external landing page templates and files into Pardot.

Pardot API: New and Changed Items

Use the Pardot API more effectively with these new features and changes.

Pardot's user authentication system is being discontinued on February 15, 2021. All users must then use Salesforce single sign-on (SSO). If you haven't already done so, take steps to prepare your Salesforce org and enable SSO for all Pardot users as soon as possible. To support customers with Pardot-only users who don't need a full Sales or Service Cloud license, your Salesforce org is now bundled with 100 Identity licenses at no additional cost. You can use these licenses to transition any remaining Pardot-only users to Salesforce SSO.

Campaigns and Assets

In Spring '21, find enhancements that support your account-based marketing efforts and streamline common tasks.

IN THIS SECTION:

When you want to create a campaign with the same related records as an existing one, you now have quick access to more types of records. You get an enhanced Clone with Related tool for campaign records that includes Marketing Link, Marketing Form, and Landing Pages.

Enhance your account-based marketing efforts when you use Connected Campaigns with Accounts as Campaign Members. Add account records as members of a campaign so you can focus your attention on these accounts in the tables, related lists, and reports that contain campaign members.

The new Business Unit field helps you organize, sort, and report on campaigns based on this important data point. You can see this information regardless of the business unit you're currently logged into. The field is read-only and supports only one-to-one relationships between campaign and business unit.
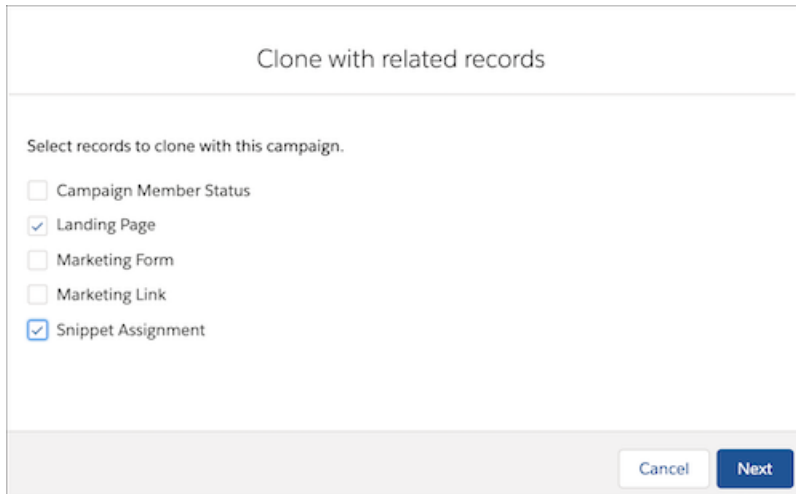
Pardot is now using an OAuth authorization method for the Webex connector. To prevent a gap in service, reauthorize and verify your Webex connector using the alert banner in your app.

Quickly Clone Campaigns with Related Assets

When you want to create a campaign with the same related records as an existing one, you now have quick access to more types of records. You get an enhanced Clone with Related tool for campaign records that includes Marketing Link, Marketing Form, and Landing Pages.

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

How: Users can select Clone with Related from a campaign's action menu and then choose which types of related records to include. The Marketing Link type includes custom redirects and files. The Marketing Form type includes forms and form handlers.

Operational and account limits apply to the feature, so we recommend that you verify how many records are associated with a campaign before you begin.

SEE ALSO:

Salesforce Help: Cloning Campaigns with Related Records (can be outdated or unavailable during release preview)

Track Accounts as Campaign Members (Beta)

Enhance your account-based marketing efforts when you use Connected Campaigns with Accounts as Campaign Members. Add account records as members of a campaign so you can focus your attention on these accounts in the tables, related lists, and reports that contain campaign members.

Where: This change applies to all Salesforce editions with any Pardot edition.

📝 Note: As a beta feature, Accounts as Campaign Members 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 Accounts as Campaign Members in the Trailblazer Community.

SEE ALSO:

Track Accounts as Campaign Members (Beta)

You Asked for It!

Organize Campaigns by Business Unit

The new Business Unit field helps you organize, sort, and report on campaigns based on this important data point. You can see this information regardless of the business unit you're currently logged into. The field is read-only and supports only one-to-one relationships between campaign and business unit.

Where: This change applies to Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** editions with any Pardot edition.

Secure Your Webex Webinars

Pardot is now using an OAuth authorization method for the Webex connector. To prevent a gap in service, reauthorize and verify your Webex connector using the alert banner in your app.

Where: This change applies to all Pardot editions.

When: A banner appears in your account on January 4, 2021 to help you upgrade to the new authorization method. On February 15, 2021, Pardot pushes the update automatically, which means webinars can stop syncing until the connector is reverified.

How: Before February 15, click the Webex banner in your account to get started. Follow the prompts and reverify your connector by logging in to Webex.

After the automatic update on February 15, you must reverify your connector. Open connector settings, find the Webex connector, and click **verify now**.

NAME	CATEGORY	VENDOR	USERNAME	STATUS
Webex	Webinar	Webex 🌐	NinaWebber	Not verified (verify now)
Salesforce.com	CRM	salesforce.com ☁	NigelSellers@rue.fr	Connection down (reconnect)
LinkedIn	Social Media	LinkedIn 🔗		☑

Email Marketing

Enhancements for email marketing in Spring '21 focus on email retention, performance analysis, and flexibility around reply-to and send-from addresses.

IN THIS SECTION:

Boost Your Email Marketing Retention with Two-Click Unsubscribe

Two-click unsubscribe helps prevent email security scanners from automatically unsubscribing prospects because it requires prospects to confirm that they no longer want to receive emails. And you can tailor the message that email subscribers see when they click the unsubscribe link.

Analyze Email Content Performance with Custom Reports

Now you can select email content as the primary object for custom report types. And you can select the list email object as a related object. Marketers can then create reports that show email content performance and engagement. For example, a report can show engagement statistics by email content record.

Clone an Email Content Record to Save Time

Marketers can now copy email content. They can keep the integrity of an email while still having the flexibility to tweak email content before sending it as a list email. The email content name, description, template, and HTML content are copied over.

Specify a Link for Completion Actions in Pardot Emails

Marketers can now set a specific link to trigger a completion action on emails, giving them more control over their email sends. Previously, any link clicked in the email triggered the defined automated action.

Marketers can manage and streamline email addressing by providing alternate email senders and reply-to addresses. They get parity with the legacy Pardot email experience and they get more control over how their email appears for different prospects. For example, marketers can select Account Assigned Owner as the sender to have the prospects account owner show as the email sender.

Marketers can now determine how many prospects they're sending an email to based on the selected recipient and suppression lists. The send modal for Pardot email shows the number of mailable prospects for the email.

Boost Your Email Marketing Retention with Two-Click Unsubscribe

Two-click unsubscribe helps prevent email security scanners from automatically unsubscribing prospects because it requires prospects to confirm that they no longer want to receive emails. And you can tailor the message that email subscribers see when they click the unsubscribe link.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: Enable two-click unsubscribe and customize the prompt and confirmation messages from the Unsubscribe Page in Pardot.

Analyze Email Content Performance with Custom Reports

Now you can select email content as the primary object for custom report types. And you can select the list email object as a related object. Marketers can then create reports that show email content performance and engagement. For example, a report can show engagement statistics by email content record.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: On the Report Types page in Setup, create a custom report type using Email Content as the primary object. Add list email as a related object to get more report options for all list emails, including emails sent from the email content record.

Clone an Email Content Record to Save Time

Marketers can now copy email content. They can keep the integrity of an email while still having the flexibility to tweak email content before sending it as a list email. The email content name, description, template, and HTML content are copied over.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It isn't 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 clone email content records and access email design capabilities.

How: Click **Clone** on the email content record and optionally change the email name, description, and template to create a record.
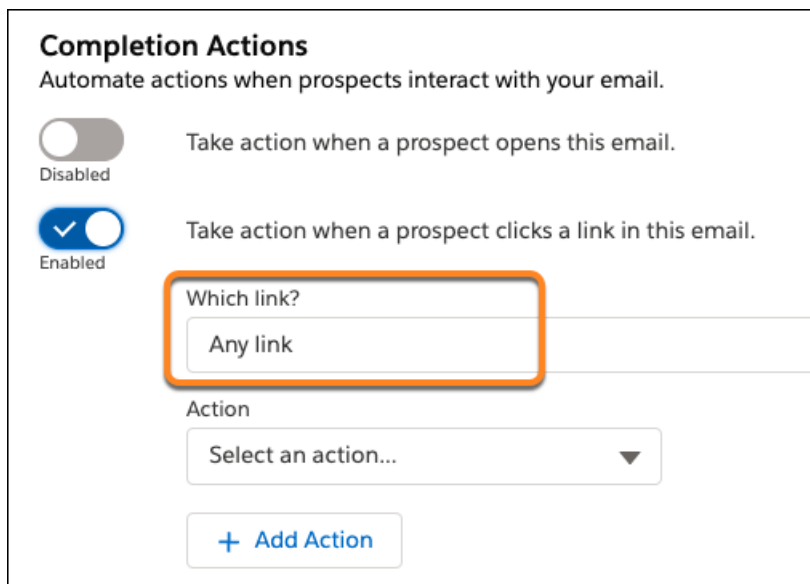
Specify a Link for Completion Actions in Pardot Emails

Marketers can now set a specific link to trigger a completion action on emails, giving them more control over their email sends. Previously, any link clicked in the email triggered the defined automated action.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It isn't 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: Turn on the link click completion action and select the link and action to use.

Add Alternate Reply-To and Email Senders to Pardot Emails

Marketers can manage and streamline email addressing by providing alternate email senders and reply-to addresses. They get parity with the legacy Pardot email experience and they get more control over how their email appears for different prospects. For example, marketers can select Account Assigned Owner as the sender to have the prospects account owner show as the email sender.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It isn't 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: Add up to five senders and reply-to users to be used in priority order. If an email can't be sent from the first sender, it's sent from the next sender in the list. Select General User or Specific User as the last alternate option to ensure the options include a valid email.

View the Number of Mailable Prospects in When Defining Email Send Settings

Marketers can now determine how many prospects they're sending an email to based on the selected recipient and suppression lists. The send modal for Pardot email shows the number of mailable prospects for the email.

Where: This change applies to all Pardot editions in Lightning Experience with Salesforce Professional, Enterprise, Unlimited, and Performance Editions. It isn't 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: Click **Calculate Mailable Prospects** in the top right of the window. You can refresh the calculation after the initial calculation completes.

Analytics and Reporting

Pardot's prescriptive and predictive analytics features offer metrics you can trust and more flexibility than ever.

IN THIS SECTION:

[Sync Custom Fields in Pardot Object Sync (Beta)](#)

Pardot Object Sync remains in beta, but with improved infrastructure. Now your standard and custom fields are available as a single Prospect dataset, and you can choose which custom fields to bring into Tableau CRM. In this dataset, we removed and renamed some fields and made sure that remaining fields get the latest values.

[Trust Attribution with Lead IDs](#)

We added the lead ID field to your data-driven model results so that you can better understand the connections between campaigns and opportunities. Updated insights offer new clarity around the virtual opportunity contact roles it identifies in your prospect, lead, and opportunity data. The lead ID field is now available on standard and custom reports and in the Data-Driven Model inside B2B Marketing Analytics.

[Exclude Archived Prospects from Datasets](#)

You can now choose whether to include or exclude archived prospects in the datasets that you use in Analytics Studio. This Pardot account-level setting applies to all apps in B2B Marketing Analytics and B2B Marketing Analytics Plus.

[Einstein Behavior Scoring Added to Analytics Setup](#)

To use Einstein Behavior Scoring and B2B Marketing Analytics together, you can simply click the link from the Einstein Behavior Scoring setup page. It sends you to Analytics Studio, where you can create an app and enable your Behavior Scoring Dashboard. If you're already using B2B Marketing Analytics dashboards, reconfigure an app to include the optional Einstein Behavior Scoring dashboard.

Sync Custom Fields in Pardot Object Sync (Beta)

Pardot Object Sync remains in beta, but with improved infrastructure. Now your standard and custom fields are available as a single Prospect dataset, and you can choose which custom fields to bring into Tableau CRM. In this dataset, we removed and renamed some fields and made sure that remaining fields get the latest values.

Where: The setting applies to B2B Marketing Analytics and B2B Marketing Analytics Plus in Lightning Experience.

- B2B Marketing Analytics Plus is available in Salesforce Enterprise, Unlimited, and Developer editions with Pardot Premium. It's also available in Pardot Plus or Advanced with the B2B Marketing Analytics Plus add-on.

- B2B Marketing Analytics is available in Pardot Plus, Advanced, and Premium, 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](#).

How: Follow two steps to get the Pardot Object Sync (beta) changes.

- The admin enables the new dataset and selects custom fields.

- Users reconfigure apps and revise queries.

To enable the dataset, find Pardot Object Sync (beta) in Salesforce Setup, and turn on the feature. Follow the steps to open Pardot Settings and select the custom fields to include in your Prospect dataset. Back in Salesforce Setup, sync the data.

In the Winter '21 beta release, all custom fields were included by default. To support custom field selection in Spring '21, fields are excluded by default. If you enabled the previous beta, visit the sync selection page to choose your fields.

After the datasets are updated, let users know it's time to reconfigure any of their B2B Marketing Analytics or B2B Marketing Analytics Plus apps that use prospect data. Default dashboards update automatically to use the new fields. If any customizations use a deleted or renamed field, users must edit the queries to refer to the new fields.

Prospect Dataset

This table shows the field labels that changed and which fields are new or not implemented in the updated Prospect dataset.

Old Developer Name	New Developer Name	Old Label	New Label
account_crm_id	N/A	CRM Account ID	N/A
account_name	ProspectAccount.AccountName	Account Name	Account Name
address_one	AddressOne	Address One	Address One
address_two	AddressTwo	Address Two	Address Two
annual_revenue	AnnualRevenue	Annual Revenue	Annual Revenue
assigned_date	FirstAssignedAt	Assigned Date	Assigned Date
assigned_user_first_name	N/A	Assigned User First Name	N/A
assigned_user_full_name	N/A	Assigned User Full Name	N/A
assigned_user_last_name	N/A	Assigned User Last Name	N/A
campaign_id	CampaignId	Pardot Campaign ID	Pardot Campaign ID
city	City	City	City
comments	Comments	Comments	Comments
company	Company	Company	Company
contact_crm_id	LeadOrContactCrmId	CRM Lead/Contact ID	CRM Lead/Contact ID
country	Country	Country	Country
created_at_date	CreatedDate	Created At Date	Created At Date
created_by_first_name	N/A	Created By First Name	N/A
created_by_full_name	N/A	Created By Full Name	N/A
created_by_last_name	N/A	Created By Last Name	N/A
crm_contact_fid	ContactId	CRM Contact ID	CRM Contact ID
crm_last_activity_date	LastSync	CRM Last Activity Date	CRM Last Activity Date
crm_lead_fid	LeadId	CRM Lead ID	CRM Lead ID
crm_owner_fid	OwnerId	CRM Owner ID	CRM Owner ID
department	Department	Department	Department
email	Email	Email	Email
employees	Employees	Employees	Employees

Old Developer Name	New Developer Name	Old Label	New Label
fax	Fax	Fax	Fax
first_name	FirstName	First Name	First Name
first_visitor_date	Visitor.FirstVisitorDate	First Visit Date	First Visit Date
full_name	FullName	Full Name	Full Name
grade	Grade	Pardot Grade	Pardot Grade
id	Id	id	Prospect ID
industry	Industry	Industry	Industry
is_archived	IsArchived	Is Archived	Is Archived
is_assigned	IsAssigned	Is Assigned	Is Assigned
is_do_not_call	IsDoNotCall	Is Do Not Call	Is Do Not Call
is_do_not_email	IsDoNotEmail	Is Do Not Email	Is Do Not Email
job_title	JobTitle	Job Title	Job Title
last_activity_date	LastActivityAt	Last Activity Date	Last Activity Date
last_name	LastName	Last Name	Last Name
most_recent_visitor_date	Visitor.MostRecentVisitorDate	Most Recent Visitor Date	Most Recent Visitor Date
mql_date	MqlDate	MQL Date	MQL Date
mql_velocity	MqlVelocity	MQL Velocity	MQL Velocity
New field	ExternalId	New field	Pardot Prospect ID
New field	IsReviewed	New field	Is Reviewed
New field	IsStarred	New field	Is Starred
opted_out	IsOptedOut	Opted Out	Opted Out
pardot_account_id	PardotAccountId	Pardot Account ID	Pardot Account ID
phone	Phone	Phone	Phone
prospect_velocity	ProspectVelocity	Prospect Velocity	Prospect Velocity
salutation	Salutation	Salutation	Salutation
score	Score	Pardot Score	Pardot Score
source	SourceName	Source	Source
source_campaign	SourceCampaign	Source Campaign	Source Campaign
stage	LifecycleStage.Stage	Stage	Stage
state	State	State	State

Old Developer Name	New Developer Name	Old Label	New Label
tags	Tags.TagName	Tags	Tags
territory	Territory	Territory	Territory
updated_at_date	LastModifiedDate	Updated At Date	Updated At Date
updated_by_first_name	N/A	Updated By First Name	N/A
updated_by_last_name	N/A	Updated By Last Name	N/A
visitor_id	Visitor.FirstVisitorId	Pardot Visitor ID	Pardot Visitor ID
website	Website	Website	Website
years_in_business	YearsInBusiness	Years In Business	Years In Business
zip	Zip	Zip	Zip

Prospect and Activity Dataset

This table shows the developer names that changed in the updated Prospect and Activity dataset. No labels were changed. We removed four fields from the Prospect and Activity dataset, because they were duplicates.

Old Developer Name	New Developer Name
ActorExternalID	N/A (Removed)
ProspectIsArchived	N/A (Removed)
ProspectJobTitle	N/A (Removed)
Prospect.account_name	N/A (Removed)
Prospect.address_one	Prospect.AddressOne
Prospect.address_two	Prospect.AddressTwo
Prospect.annual_revenue	Prospect.AnnualRevenue
Prospect.is_archived	Prospect.IsArchived
Prospect.city	Prospect.City
Prospect.comments	Prospect.Comments
Prospect.company	Prospect.Company
Prospect.country	Prospect.Country
Prospect.crm_contact_fid	Prospect.ContactId
Prospect.crm_lead_fid	Prospect.LeadId
Prospect.crm_owner_fid	Prospect.OwnerId
Prospect.department	Prospect.Department

Old Developer Name	New Developer Name
Prospect.email	Prospect.Email
Prospect.employees	Prospect.Employees
Prospect.fax	Prospect.Fax
Prospect.first_name	Prospect.FirstName
Prospect.full_name	Prospect.FullName
Prospect.grade	Prospect.Grade
Prospect.industry	Prospect.Industry
Prospect.is_do_not_call	Prospect.IsDoNotCall
Prospect.is_do_not_email	Prospect.IsDoNotEmail
Prospect.job_title	Prospect.JobTitle
Prospect.last_name	Prospect.LastName
Prospect.opted_out	Prospect.IsOptedOut
Prospect.phone	Prospect.Phone
Prospect.assigned_date	Prospect.FirstAssignedAt
Prospect.created_at_date	Prospect.CreatedDate
Prospect.crm_last_activity_date	Prospect.LastSync
Prospect.id	Prospect.ExternalId
Prospect.last_activity_date	Prospect.LastActivityAt
Prospect.updated_at_date	Prospect.LastModifiedDate
Prospect.salutation	Prospect.Salutation
Prospect.score	Prospect.Score
Prospect.source	Prospect.SourceName
Prospect.source_campaign	Prospect.SourceCampaign
Prospect.state	Prospect.State
Prospect.tags	Prospect.Tags.TagName
Prospect.territory	Prospect.Territory
Prospect.website	Prospect.Website
Prospect.years_in_business	Prospect.YearsInBusiness
Prospect.zip	Prospect.Zip

> **Note:** If you added a Score field from the B2BMktgProspect object to a custom query in Winter '21, remove it from Data Manager to resync the dataset.

SEE ALSO:

Salesforce Help: Pardot Object Sync Considerations (can be outdated or unavailable during release preview)

Salesforce Help: After You Upgrade (can be outdated or unavailable during release preview)

Trust Attribution with Lead IDs

We added the lead ID field to your data-driven model results so that you can better understand the connections between campaigns and opportunities. Updated insights offer new clarity around the virtual opportunity contact roles it identifies in your prospect, lead, and opportunity data. The lead ID field is now available on standard and custom reports and in the Data-Driven Model inside B2B Marketing Analytics.

Where: This change applies to Pardot Advanced and Pardot Premium editions with Salesforce Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: How Einstein Attribution Works (can be outdated or unavailable during release preview)

Exclude Archived Prospects from Datasets

You can now choose whether to include or exclude archived prospects in the datasets that you use in Analytics Studio. This Pardot account-level setting applies to all apps in B2B Marketing Analytics and B2B Marketing Analytics Plus.

Where: This change applies to Lightning Experience and Salesforce Classic and is included with Pardot Plus, Advanced, and Premium. The change also affects Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.

How: By default, archived prospects are included in datasets. Select your preference in Pardot Settings.

SEE ALSO:

Salesforce Help: Pardot Analytics (can be outdated or unavailable during release preview)

Einstein Behavior Scoring Added to Analytics Setup

To use Einstein Behavior Scoring and B2B Marketing Analytics together, you can simply click the link from the Einstein Behavior Scoring setup page. It sends you to Analytics Studio, where you can create an app and enable your Behavior Scoring Dashboard. If you're already using B2B Marketing Analytics dashboards, reconfigure an app to include the optional Einstein Behavior Scoring dashboard.

Where: This change applies to Lightning Experience in Pardot Advanced and Premium with Salesforce Enterprise and Unlimited editions.

Protect Prospect Activity Data with First-Party Tracking (Generally Available)

Pardot's first-party tracking is now generally available. First-party tracking helps prevent the loss of prospect activity data, gives you more flexibility with campaign attribution, and blocks traffic that doesn't come from your domains. To protect consumer privacy, web browsers are moving away from supporting third-party cookies to track activity across assets and domains.

Where: This change applies to all Pardot editions.

How: Enable first-party cookie tracking from Pardot Settings, then update your tracker domains in Domain Management.
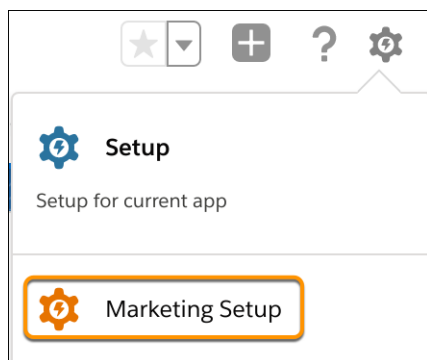
SEE ALSO:

> *Salesforce Help*: Pardot First-Party Tracking (can be outdated or unavailable during release preview)

Access the Pardot Setup Assistant from the New Salesforce Marketing Setup App

Now you can find all the standard Pardot configuration tasks in one place, the Marketing Setup app. Setup for other Salesforce marketing tools plus improvements to the existing Pardot setup assistant are planned for upcoming releases.

Where: This change applies to all Pardot editions.

How: From any Salesforce page, click ⚙ to open setup options, and select Marketing Setup.

SEE ALSO:

> *Salesforce Help*: Pardot Setup Implementation Guide (can be outdated or unavailable during release preview)

Company Field in Pardot Dictates Business Unit Name in Pardot Account Setup

To avoid confusion, the Company name field in Pardot settings now acts as the source of truth for a given Pardot business unit. If there's a conflict with the business unit name in Salesforce setup, the Company name field in Pardot overwrites the name in Salesforce. Previously, a business unit could have a different name in Salesforce than in Pardot.

Where: This change applies to all Pardot editions.

Sync Prospects Safely With Cross-Business Unit Leads and Contacts

A new setting on the Salesforce-Pardot connector stops Pardot package fields from syncing to lead and contact records in Salesforce. Use this setting as part of a custom setup to sync prospects from different Pardot business units to a single lead or contact in Salesforce. There's no need to maintain duplicate lead or contact records. We recommend working with a partner to implement this for your org.

Where: This change applies to Pardot Advanced and Premium editions with more than one business unit.

How: On the Salesforce-Pardot connector settings, select the checkbox to stop syncing Pardot package fields. Next, reconfigure Marketing Data Sharing rules so lead and contact records sync to more than one business unit. Then, create a custom object to use for lead or contact marketing information and use the Pardot Export API to sync prospect field values from different business units.

SEE ALSO:

Salesforce Help: Default Prospect Field Mapping (can be outdated or unavailable during release preview)

Pardot API V5 Generally Available

Now you can use a new, standardized version of the Pardot API. Version 5 of the Pardot API offers new endpoints so you can manage custom redirects and import your own external landing page templates and files into Pardot.

Where: This change applies to all Pardot editions with API access.

How: Enable access to the Pardot API v5 endpoints from your Pardot account settings.

SEE ALSO:

Developer Docs: Pardot API Documentation (can be outdated or unavailable during release preview)

Pardot API: New and Changed Items

Use the Pardot API more effectively with these new features and changes.

Prospect object

Added and updated several fields for prospect bulk exports.

The Opt-in and Do Not Email fields are now editable.

Pardot User Authentication is Being Retired

Pardot's user authentication system is being discontinued on February 15, 2021. All users must then use Salesforce single sign-on (SSO). If you haven't already done so, take steps to prepare your Salesforce org and enable SSO for all Pardot users as soon as possible. To support customers with Pardot-only users who don't need a full Sales or Service Cloud license, your Salesforce org is now bundled with 100 Identity licenses at no additional cost. You can use these licenses to transition any remaining Pardot-only users to Salesforce SSO.

Where: This change applies to all Pardot editions.

How: Use the Pardot User Migration Admin Guide to help you prepare your org and enable SSO for all Pardot users.

SEE ALSO:

Salesforce Help: Pardot User Migration Admin Guide (can be outdated or unavailable during release preview)

Marketing

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.

SEE ALSO:

Marketing Cloud Overview

Marketing Cloud: Earlier Release Notes

Salesforce Marketing Cloud Facebook Page

Release Updates

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but that can affect your existing customizations. Find the Spring '21 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 to evaluate its impact on your org.

Enforced Updates

These updates were announced in a previous release and are now enforced.

Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Enforced)

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.

Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Enforced)

To improve security and stability, this update prevents attribute values passed to `$A.createComponent()` or `$A.createComponents()` from being interpreted as Aura function expressions. This update is enforced in Spring '21.

Disable Rendering of HTML in Custom Fields Labels (Update, Enforced)

To better protect your Salesforce org, this update removes legacy behavior that allows HTML formatting in custom field labels. When this update is enabled, HTML tags in custom field labels are rendered as plain text.

Enable Partial Save for Invocable Actions (Update, Enforced)

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. This update, released in Winter '20, was scheduled for enforcement in Summer '20 and first postponed to Winter '21. This update was again postponed to and is enforced in Spring '21.

Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Enforced)

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. This update, released in Spring '20, was scheduled for enforcement in Summer '20, but was postponed to and is enforced in Spring '21.

Previously Released Updates

These updates were announced in a previous release and are still available.

Enable ICU Locale Formats (Previously Released Update)

To do business wherever you are, adopt 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.

Deploy a My Domain (Previously Released 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. This update was first made available in Winter '21.

Keep Working with Tab-Focused Dialogs (Previously Released Update)

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. This update was first made available in Winter '20.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Previously Released Update)

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. This update was first made available in Summer '20.

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released 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. This update is enforced in Winter '22.

Newly Announced Updates

These release updates are newly announced in Spring '21.

Securely Call the Visualforce Remoting API (Update)

The Visualforce Remoting API uses JavaScript to call methods in Apex controllers directly from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update is enforced in Winter '22.

Convert the Read Only Standard Profile to a Custom Profile (Update)

This update converts the Read Only standard profile to a custom profile. After the update is enforced, you can edit permissions in this profile as your business needs require.

Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update)

Secure access to subscriber orgs by requiring multi-factor authentication (MFA) when logging into the License Management Org (LMO).

Accurately Measure the CPU Time Consumption of Flows and Processes (Update)

With this update enabled, Salesforce accurately measures, logs, and limits the CPU time consumed by all flows and processes. Previously, the CPU time consumed was occasionally incorrect or misattributed to other automation occurring later in the transaction, such as Apex triggers. Now you can properly identify performance bottlenecks that cause the maximum per-transaction CPU time consumption limit to be exceeded. Also, because CPU time is now accurately counted, flows and processes fail after executing the element, criteria node, or action that pushes a transaction over the CPU limit. We recommend testing all complex flows and processes, which are more likely to exceed this limit.

Analyze Screen Flow Usage (Update)

With this update, you can use reports to examine run-time details about your screen flows. Discover usage patterns and in turn optimize screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows.

Postponed Updates

These updates are postponed.

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. This release update doesn't affect usage of Apex setters.

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

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. This security update requires external users to confirm their community email address changes.

Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update, released in Summer '19, was scheduled for enforcement in Summer '20 and then postponed to Winter '21, but was 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.

Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Disable Rules for Enforcing Explicit Access to Apex Classes update is now scheduled to be enforced in Spring '22. With this update, the running user of a flow or process no longer requires explicit access to Apex classes that are invoked by the flow or process.

Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)

This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field. This update, released in Spring '19, was scheduled for enforcement in Spring '21, but was postponed to Spring '22. This update was enabled in Salesforce orgs that received Summer '20 before July 10, 2020. If this is true for your org and you disabled the update, you must enable it in Spring '22. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Spring '22.

Email-To-Case Update Enforcement Extended to Winter '22 Release

A new enforcement deadline for the Winter '21 Email-To-Case updates gives admins until the Winter '22 release to adopt the changes through the Release Update feature.

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

This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record. This update, released in Spring '20, was scheduled for enforcement in Summer '20 and then postponed to Spring '21, but was postponed again to Summer '21. In Spring '21, Salesforce enabled the test run option for this update due to a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Summer '21.

Enable Enhanced Folder Sharing (Update, Postponed)

This update is postponed to Spring '22. It was originally scheduled for auto-activation (enforcement) in Spring '20. Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards.

Retired Updates

These updates were announced in a previous release but are retired. They were removed from the Release Updates node and won't be activated.

Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Retired)
This update has been retired. To remove instance names from your URLs, use enhanced domains.

Require Permission to View Record Names in Lookup Fields (Update, Retired)
This update has been retired. Salesforce won't enable this update in all Salesforce orgs. Instead, you can choose when to restrict who can view record names in lookup fields with an opt-in setting on the Sharing Settings page.

myTrailhead

Add your company's product names to the Products list on myTrailhead and help your users pinpoint the content they're looking for. Complete myTrailhead modules without leaving the Salesforce app thanks to In-App Learning with Trailhead.

IN THIS SECTION:

Customize the Product Filters on myTrailhead
Product filters help your myTrailhead users quickly find the content that's most relevant to them. For example, filters for Sales Cloud and Service Cloud direct users to the modules and trails about those Salesforce products. Customize the Products list with your company's product names so that your users can zero in on the content that's essential to them. You can also delete filters that you no longer want from the Products category.

Learn in the Flow of Work with In-App Learning with Trailhead (Beta)
With In-App Learning with Trailhead, you can learn the skills you need when you need them—without leaving your Salesforce org. Admins or designated trainers can add relevant myTrailhead modules to the learning panel, matching the learning content to the context where your users encounter it. Trailblazers can read the content, take the quizzes, and earn the badges right in the Salesforce app.

Customize the Product Filters on myTrailhead

Product filters help your myTrailhead users quickly find the content that's most relevant to them. For example, filters for Sales Cloud and Service Cloud direct users to the modules and trails about those Salesforce products. Customize the Products list with your company's product names so that your users can zero in on the content that's essential to them. You can also delete filters that you no longer want from the Products category.

Where: myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

Who: All users with the myTrailhead Content Access permission can log in to their company's myTrailhead site. Users with the myTrailhead Branding Management permission can access Trailmaker Settings to customize the filters in the Products category. Users with the myTrailhead Content Creation permission can assign product filters to—or delete them from—modules and trails. Users with the myTrailhead Release Management permission can create and publish releases. Users with both the myTrailhead Content Creation and myTrailhead Release Management permissions can upload modules and trails from Trailmaker Content to Trailmaker Release.
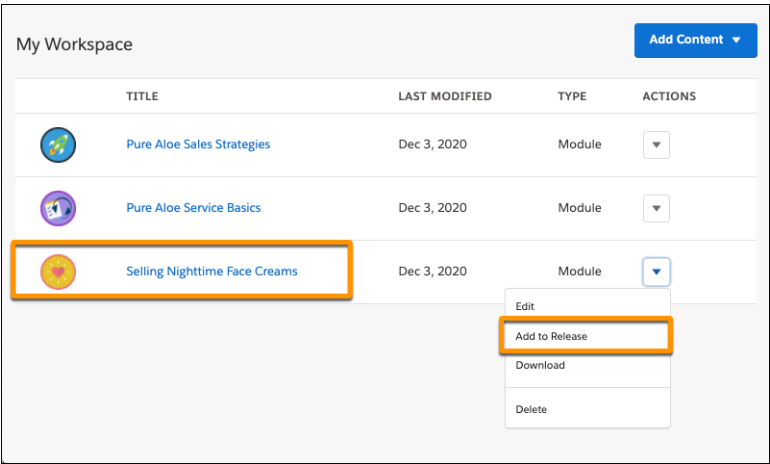
How: Customizing the product filters on myTrailhead requires collaboration from multiple users: admins, writers, and release managers. To make a new filter available, the admin adds the filter name to the Products list on the Filters page in Trailmaker Settings.
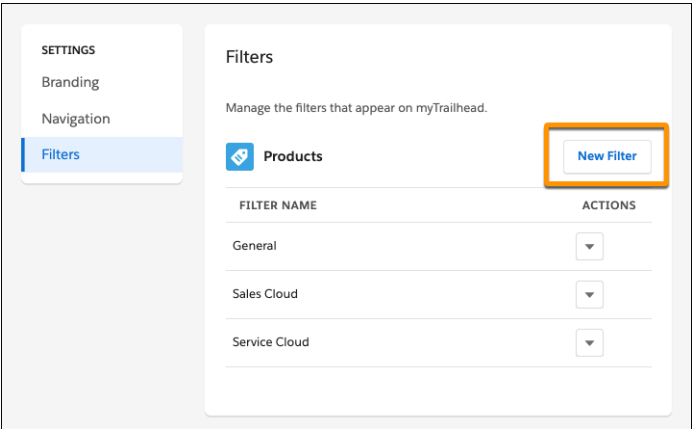
Adding the filter in Trailmaker Settings also adds the filter to the Products list in Trailmaker Content. The writer then can use Trailmaker Content to assign the new filter to a module or trail.
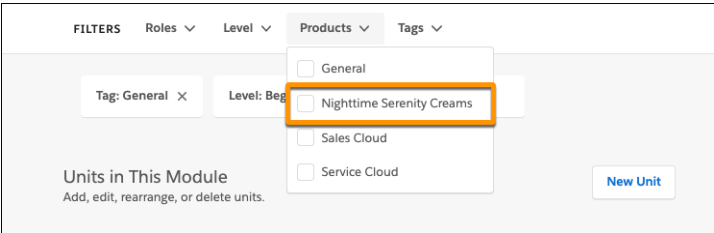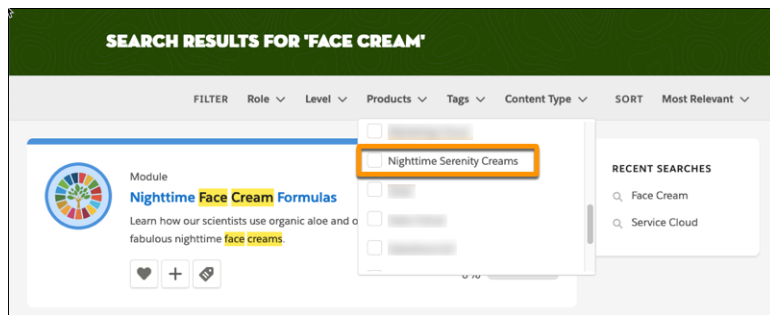

The writer or release manager uploads that content from Trailmaker Content to Trailmaker Release.

After the release is published, Trailblazers can sort content by the product filter to pinpoint all the modules or trails that the filter is assigned to.
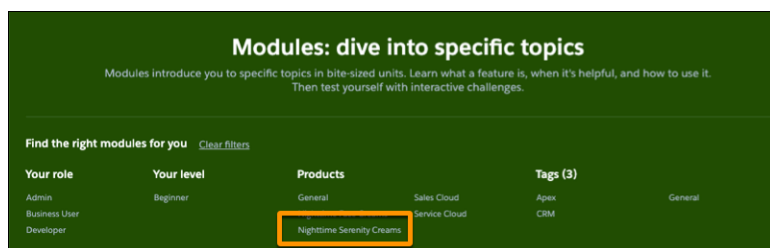
Trailblazers can also narrow their search results on myTrailhead by selecting the product filter.

Deleting a filter from myTrailhead is a similar collaboration.

- The writer uses Trailmaker Content to delete the filter from all modules and trails that the filter is assigned to.

- The writer or release manager uploads the modules and trails from Trailmaker Content to Trailmaker Release.

- The release manager publishes the release. The filter is removed from myTrailhead, and Trailblazers can no longer sort content by that filter.

- The admin can delete the filter from the list of products in Trailmaker Settings, which also removes it from the list of products in Trailmaker Content. Writers can no longer assign the filter to modules or trails.

SEE ALSO:

   Salesforce Help: Manage Filters (can be outdated or unavailable during release preview)

Learn in the Flow of Work with In-App Learning with Trailhead (Beta)

With In-App Learning with Trailhead, you can learn the skills you need when you need them—without leaving your Salesforce org. Admins or designated trainers can add relevant myTrailhead modules to the learning panel, matching the learning content to the context where your users encounter it. Trailblazers can read the content, take the quizzes, and earn the badges right in the Salesforce app.

Note: As a beta feature, In-App Learning with Trailhead 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.

Where: This change applies to Lightning Experience in Developer, Professional, Enterprise, Performance, and Unlimited editions. myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

Who: All users have access to view the new icon in the global header and the panel. myTrailhead users can view myTrailhead content in the panel.

Admins with Modify All Data or Customize Application can assign learning to users via the Learning object. To grant trainers, sales leads, or others the ability to manage learning, use the Manage Learning user permission.

Why: If your company uses Salesforce Identity for myTrailhead as the authentication provider for myTrailhead, you can earn myTrailhead badges in Salesforce, but not public Trailhead badges. If your company uses Trailblazer.me to access myTrailhead, you can earn myTrailhead badges and public Trailhead badges in the Salesforce app.

SEE ALSO:

Bring the Trailhead Learning Experience Inside the App (Beta)

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.

Success Cloud

The certified experts, consultants, and innovative tools of Salesforce Success Cloud are here to help with professional services, prescriptive advice, and expertise at every stage of your journey.

Spotlight on Content

We added a Trailhead module; instructional videos; and a new resource, Communities User Licenses for Industries.

IN THIS SECTION:

Explore Features with Trailhead
Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Watch Videos (English Only)
We created and updated instructional videos to help your users learn about new and improved Salesforce features.

Introducing Communities User Licenses for Industries
We've created a new resource, Communities User Licenses for Industries, that lays out in detail the objects that Industries cloud admins can share with Experience Cloud users. Use this information to help plan your Experience Cloud site implementation based on the licenses you have.

Explore Features with Trailhead

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Check out Trailhead at https://trailhead.salesforce.com, and find the right trail for you. Here are the latest additions.

Modules

Salesforce Private Connect for AWS

Discover a new way to increase security on your AWS integrations.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new ▶ Save Time Creating and Managing Dashboards with Reusable Dashboard Components video shows how to streamline how you build and manage dashboards in Tableau CRM.

- The new ▶ How Multi-Factor Authentication Works to protect Account Access video describes what MFA is, how it works, and why it's an important piece of your Salesforce security strategy.

- The new ▶ Welcome to Meeting Studio (can be outdated or unavailable during release preview)shows how to use the Meeting Studio, part of Salesforce Meetings, to provide a unique visual experience during your next meeting.

Introducing Communities User Licenses for Industries

We've created a new resource, Communities User Licenses for Industries, that lays out in detail the objects that Industries cloud admins can share with Experience Cloud users. Use this information to help plan your Experience Cloud site implementation based on the licenses you have.

Why: Each community license enables you to give create, read, write, or delete permissions to Experience Cloud users for specific data objects. With the new Object Access table, you can tell at a glance which permissions you can assign on which objects under the license you have. Check out Communities User Licenses for Industries.

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.