

# Salesforce Release Notes

Salesforce, Summer '21

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





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

#### Salesforce Overall

Get ready for a host of new features and improvements to your Salesforce experience. Browse, buy, and manage your subscriptions in the new Your Account self-service app. Keep track of license use with the new Active Licenses tab. Support your users with enhanced Learning Paths and In-App Guidance. Boost response rates to Salesforce surveys and improve information gathering. Simplify, streamline, and extend appointment management with Salesforce Scheduler. Offer users a smarter and faster way to find information with Einstein Search.

#### **Analytics**

Analyze and update your data at the same time with inline editing from the Report Run page in Lightning Experience. Experiment fearlessly in Tableau CRM Data Prep recipes knowing you can undo changes and revert to previous versions. Fast-track dashboard building by copying and pasting widgets across Tableau CRM dashboards. See what's changed in your data analysis between report runs with Einstein Discovery in Reports.

#### Commerce

Salesforce B2B2C Commerce on Lightning Experience brings the power of the Salesforce platform to your end-to-end B2C storefront commerce solutions. B2B Commerce includes enhancements that make it easier for admins to set up the app and for store managers to manage their products, improvements to Einstein search suggestions, and new checkout and integration options. Omnichannel Inventory provides an updated core flow action. Salesforce Order Management introduces new flows that let you manage and track return orders, the ability to use order data in Marketing Cloud, and new shopper self-service functionality.

#### Customization

Easily see why a user or group has the record access they do, right in Lightning Experience. See new locales and up-to-date locale formats throughout Salesforce. And, enhancements to External Services give you access to a larger selection of publicly available APIs.

#### Salesforce Summer '21 Release Notes

#### 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.

#### Einstein

Einstein Lead Scoring has a guided setup flow, and it gives you the option to score segments of leads for more accurate results. All Einstein Search features, including personalization, natural language search, and the actionable instant results are now generally available at no extra cost. Einstein classification tools are expanded and improved, including Einstein Case Wrap-Up, which is now generally available. Work more productively and get more accurate and personalized results with all the features that Salesforce Einstein has to offer.

#### Einstein Automate

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (pilot). Integrate across any system with Mulesoft Composer for Salesforce. Build and deliver personalized recommendations with Einstein Recommendation Builder and Einstein Next Best Action.

#### **Experience Cloud**

Maintain site continuity at all times with the new Service Not Available page, and protect your brand and site security with a dedicated CDN certificate. The Build Your Own (LWR) template is now more widely available, and with it, you can take advantage of a new branding system that includes color palettes for page sections. And we bid farewell to Internet Explorer 11, which is no longer supported.

#### Field Service

Start workers off on the right foot with paths to guide them and give them insights into asset setup status. Keep workers on track with guided steps for completing their work with work plans, and help service managers easily manage work plans by using templates for common work plans and work steps. Let Einstein recommend parts for work orders with Recommendation Builder, or use it to build a custom recommendation to meet your business needs.

#### Industries

Industry-specific solutions are more intelligent and more flexible. Financial Services Cloud helps manage consent and disclosure authorizations with the Intelligent Document Automation feature. Health Cloud simplifies and optimizes appointment scheduling with intelligent recommendations. Consumer Goods is more convenient than ever, with a setup assistant and desktop support for visit execution. Manufacturing Cloud makes it easier to revise sales agreements and filter forecasts and schedules. Loyalty Management lets you personalize promotions and customize and benefit actions, and Rebate Management delivers new ways to manage and calculate payouts. Public Sector Solutions introduces tools to automate data entry and mapping, improving quality and efficiency. Sustainability Cloud adds features for filtering and visualizing energy performance and emissions. Data Processing Engine, Decision Table, and Batch Management give you new fields and functionality for managing and leveraging your data.

#### 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.

#### Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for Android. Mobile Publisher for Experience Cloud lets admins configure how URLs open in the Experience Cloud app, and customize menu items to help users navigate the app.

#### myTrailhead

Create modules and trails with confidence and ease: Trailmaker Content saves your changes to the cloud and lets you upload files for your badge and trail art. Customize the role and level filters on myTrailhead to reflect your company's content and business needs. Salesforce Identity for myTrailhead users can access myTrailhead and public Salesforce Trailhead from the same login and create trailmixes with content from both sites.

#### **Pardot**

Use the power of Einstein to better understand your accounts and boost email engagement with Einstein Send Time Optimization. We also improved Pardot Object Sync and made it generally available along with account-based campaign management tools. You can also upgrade your mailability model for simplified email marketing settings and enjoy new and improved developer docs that make it easier to use Pardot APIs.

#### Revenue

Update permissions, assign new permission sets, and enable settings for permissions and browser performance improvements. Use a new required picklist.

#### Sales

Pipeline Inspection gives sales teams a single pipeline view and helps them focus on the most important deals. Create and manage forecast types to get more options and an improved experience. Get more refined email engagement data and improved email templates. Help sales reps adopt and adhere to company policies and COVID-19 safety protocols using flows in Salesforce Maps. Salesforce Meetings gives reps more insights to help keep deals moving. Einstein Conversation Insights is available for service agents.

#### Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Salesforce Anywhere. Use templates in more places with the Template Library in Lightning Experience, streamline your template process with template live apps, and update live Salesforce data from anywhere. Measure and report on your users' document engagement with Quip metrics in Tableau and Tableau CRM.

#### Salesforce CMS

Take more control of your Salesforce CMS content. Manage publication schedules, share content through the Experience Cloud Content Delivery Network (CDN), edit custom content types, and view details about your CMS Experiences and where they use CMS content at a glance.

#### Security and Identity

Preview Multi-Factor Authentication Assistant behavior before you deploy it. URL redirects and OAuth 2.0 flows are more secure and efficient. You can now update users' email addresses more easily and securely. HTTPS is required for Salesforce domains, and enhanced domains meet browser security requirements. Encrypt the User Email field (beta). Learn more about API version use with the new API Total Usage event type. Security Center now integrates with Threat Detection (beta). For sites, improve page load times with caching and update guest user licenses.

#### Service

Enjoy new Service Cloud tools that help you scale and streamline your business to provide a unified service experience powered by automation. Increase your time to value with the Service Setup Assistant, which creates an optimized Service app for you and your team and now takes care of more key setup steps. Use Workforce Engagement to streamline your contact center operation with data-driven shift planning tools and a win-win feature that lets employees grow and apply their skills (hint: it involves Trailhead). Get the full power and potential of Service Cloud Voice by integrating it with the telephony provider of your choice. Learn when Einstein refreshes replies for your chat agents, and track Einstein's progress in building your predictive model for Einstein Case Classification.

#### 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.

#### 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.

#### Other Salesforce Products and Services

#### Spotlight on Content

We updated a Trailhead module, created an instructional video, and moved Single Sign-On (SSO) content. While you're checking those out, take a moment to learn about our Industries Cloud Common Developer resources.

#### Release Updates

Release Updates continue to provide important information about org changes and have fully replaced critical updates.

#### Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

# How to Use the Release Notes

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

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



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

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

#### IN THIS SECTION:

#### Use Filters to Zero In on the News That Matters Most

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

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

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

#### You Asked for It!

We delivered the features you asked for on IdeaExchange.

#### Release Note Changes

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

#### Your Feedback Matters

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

# Use Filters to Zero In on the News That Matters Most

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

#### **Experience**

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

#### **Edition**

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

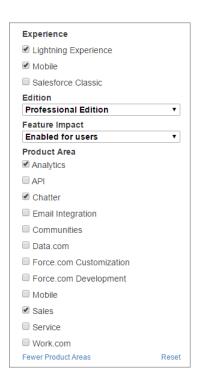
#### **Feature Impact**

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

#### **Product Area**

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

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



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

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

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

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

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

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

# You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered	
Salesforce Overall		
Include Topic Setups in Lightning Version	Enable Topics for Objects in Lightning Experience	
Chatter Topic Management in Lightning	Setup	
Customization		
Separate Contract Sharing Rules	Control Access to Sensitive Data with Restriction	
Criteria Based Sharing rules: Allow Lookup/formula/dynamic values and user field	Rules (Beta) (partially delivered)	
Support for fully private (no read or write) activity sharing model.		
Sales		
Add Data Set Refresh Button	Copy and Update Data Sets	
Additional fields for HTML Email Status Report	Learn More with Email Reporting	
Allow others to view HTML Email Status Report from emails I sent		
Service		
Lightning Rich Text Editor Needs Option to Expand or Pop Out	Expand Your Editorial Space on Articles for Easier Updates	
Remove Master/Slave Terminology from the Embedded Service API	Inclusive Terms Are Replacing Legacy Language	

# **Release Note Changes**

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

# August 23, 2021

#### **Enforce OAuth Scope for Lightning Apps (Update)**

Clarified that the scope of an OAuth token isn't currently enforced for Lightning apps. Also, added more details to the description of a Lightning app.

#### **New and Changed Connect REST API Request Bodies**

Added information on the new sourceType property for the Connectors Call Input request body.

#### Visualforce Page Overrides Open in a Modal in Lightning Console

Added a release note about how some pages in Lightning console open.

#### **Prepopulate Dependent Picklists with Default Values**

Removed cases from the list of supported objects.

### August 16, 2021

#### **Enable Browser Performance Improvements for Salesforce CPQ (Update)**

Added link to the Knowledge Base article describing the known differences in the user interface.

#### Simplify Metadata for myTrailhead Trails and Modules

Added a release note to announce that the Tags category for myTrailhead content filters now applies only to units, and is no longer available for trails and modules.

### August 2, 2021

#### **Enable Browser Performance Improvements for Salesforce CPQ (Update)**

Updated the enforcement date from Winter '22 to Spring '22.

# July 26, 2021

#### **Enable Site User Access for Health Cloud**

Removed a sentence from the When section that said that certain customers got the new PSL only at a later date.

#### **Assign and Test Access Permission Sets for Data Security**

Added a note that the new Access permission sets add Read access requirements for the Salesforce CPQ package's Localization object.

# July 19, 2021

#### Manage Your Customer Identities in a Central Location with Salesforce Customer Identity Plus

Announcing the release of Salesforce Customer Identity Plus.

#### See More Clearly When Using a Custom Theme

Clarified why the changes were made and added a link to more information.

#### See Lead Event Drivers and More in the Updated AppExchange Marketplace Analytics Dashboard

Added a release note announcing new AppExchange Marketplace Analytics dashboard visualizations.

#### **B2B2C Commerce (Generally Available)**

Fixed B2B2C Commerce title that appears in left nav bar.

#### **B2B Commerce for Lightning**

Fixed first sentence in B2B Commerce for Lightning topic so it says 'Extend B2B Commerce'

#### The Commerce App

Fixed first sentence in The Commerce App topic so it says 'Extend B2B Commerce'

#### Metadata API

Added information on the new ipAddressRange metadata type

#### **Enable Enhanced Domains (Update)**

Updated the link to the Trailblazer group to reflect the group's new name.

# July 15, 2021

#### **Enable Site User Access for Health Cloud**

Added a new release note.

#### **Enable Site User Access for Objects in the Clinical Data Model**

Added a new release note.

### July 12, 2021

#### **Explore Features with Trailhead**

Added a new module for Workforce Engagement and an updated module for Service Cloud Voice.

#### **Enable Enhanced Domains (Update)**

Updated the when section. This feature is now available in Hyperforce orgs. It isn't available in scratch orgs or in Developer Edition orgs.

#### **B2B2C Commerce (Generally Available)**

Add sentence and link to introduce the 'Sell Direct to Consumers with Salesforce B2B2C Commerce' video.

#### **Verify Segment Membership**

Added a new release note.

#### Bring Salesforce and Microsoft Teams Together (Generally Available)

Updated the When section. This feature became generally available on June 25, 2021.

#### See myTrailhead and Salesforce Trailhead Content via the Same Login with Salesforce Identity for myTrailhead

Added a release note to announce an enhancement for myTrailhead subdomains that use the Salesforce Identity for myTrailhead (SIFM) authentication provider.

#### Get the Latest Version of Tableau CRM for iOS and Android

Added information about the newest version of mobile analytics.

#### Identity Connect 2.1 and Identity Connect 3.0.1.2 Are Being Deprecated

Added release date information for Identity Connect 7.

#### Secure HTTPS Connections to Third-Party Domains Are Enforced

Clarified that hyperlinks from Visualforce pages are unaffected and that this change can affect your Health Check score.

#### **Secure HTTPS Connections Are Enforced in Domains**

Clarified that this change can affect your Health Check score.

#### Secure HTTPS Connections Are Enforced in Experience Cloud Sites and Salesforce Sites

Clarified that this change can affect your Health Check score.

# July 5, 2021

#### Watch Videos (English Only)

Added an entry to the videos list.

#### **Increase Transparency About Location Sharing**

Updated the Where section. This feature isn't currently supported on the Android Field Service mobile app.

#### **Assign and Test Access Permission Sets for Data Security**

Clarified that users shouldn't clone the Access permission sets, and that the Perform Enhanced Data Access Checks setting is designed for testing the new Access sets before Salesforce CPQ Spring '22.

#### **Lightning Locker Sanitize Markup Changes**

Added information about sanitizing markup.

#### Deploy and Retrieve Up to 35,000 files in AppExchange Packages with Metadata API

Added note for new file limit increase.

#### **Redirect Users to Your Experience Builder Sites**

Added release note for the Experience Builder Canonical URL tag.

### June 21, 2021

#### **Loyalty Management Objects Available in Marketing Cloud Connect**

Added a new release note.

#### **OmniStudio**

Added a link to OmniStudio release notes and documentation.

#### **Explore Features with Trailhead**

Added entries for the new Security Center module and new Explore Advanced Security Features trail.

#### Bring Salesforce and Microsoft Teams Together (Generally Available)

Updated screenshot to show more details.

#### **Composite Subrequest Result**

Added information about the behavior of composite requests if dependent subrequests specify null fields or fields that aren't explicitly specified in the parent request.

#### Add and Delete Custom Role and Level Filters on myTrailhead

Customize the filters for the Roles and Levels categories on myTrailhead to suit your company's needs.

#### Report on Engagement for Leads, Contacts, Users, and Sales Cadences

Clarified that the new reports become available on July 1, 2021.

#### **Event Targets Are Always Retargeted**

Added a change on event retargeting for Lightning Web Components.

### June 14, 2021

#### **Run Loyalty Programs on Hyperforce**

Added a release note announcing that Loyalty Management is now available on Hyperforce.

#### SfFunctionsConnection object

Added information about new SfFunctionsConnection object.

#### Get the Latest Version of Tableau CRM for iOS and Android

Added information about version 13.0 of Tableau CRM for iOS and Android.

#### **B2B2C Commerce (Generally Available)**

Add release notes for B2B2C Commerce general availability on 6/15/2021.

#### **Verify Segment Membership**

Added a new release note.

#### Identity Connect 2.1 and Identity Connect 3.0.1.2 Are Being Deprecated

Identity Connect 7 isn't quite ready for showtime, but we'll let you know as soon as it is.

#### **Receive Images from Customers Over Toll-Free Numbers**

Added information on customer impact.

#### **Update Site Guest Users to the Latest License**

Added additional information about this change and how to test.

#### **Einstein Relationship Insights**

Added release notes announcing the general availability of Einstein Relationship Insights.

### June 7, 2021

#### **Customize Reusable Promotion Emails**

This feature is ready for showtime.

#### Increase Your Rebate-Driven Sales with Einstein Discovery for Rebate Management (Beta)

Updated the add-on license information.

#### Enable Browser Performance Improvements for Salesforce CPQ (Update)

Added instructions to help you verify the update.

### June 3, 2021

#### Output Prepared Data from Tableau CRM into Salesforce with the Salesforce Output Connector (Generally Available)

Clarified the maximum rows output per run and per day.

### May 31, 2021

#### **Spotlight on Content**

Added information about new and updated Trailhead resources, instructional videos, and documentation.

#### Bring Salesforce and Microsoft Teams Together (Generally Available)

Corrected feature name and clarified where the feature is available. Added updated screenshot.

#### Prepare Your AppExchange Customers for US Sales Tax Collection

Added a release note to the Development > AppExchange Partners section.

#### Prepare for US Sales Tax Collection on Your AppExchange Purchases

Added a release note to the Customization > AppExchange section.

#### Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Generally Available)

Added a release note to the Analytics section announcing that the Tableau Online connector is now generally available.

#### Metadata API

Added new Commerce fields for the WebStoreTemplate metadata type.

#### Salesforce CDP

Added a release note to announce the new name for Salesforce CDP, formerly Customer 360 Audiences.

#### **Deploy a My Domain (Previously Released Update)**

Corrected how Salesforce assigns My Domain names in Winter '22.

#### **Enable Enhanced Domains (Update)**

Updated the availability date for this feature and added a link to the Enhanced Domains group in the Trailblazer Community.

#### **Motivate Your Trailblazers with the Today Page**

Added a release note to announce a new Today page design that welcomes users when they log in to their myTrailhead subdomain.

#### **Use Order Data in Marketing Cloud**

Added a release note to the Commerce section announcing that Salesforce Order Management data is now available in Marketing Cloud via Marketing Cloud Connect.

#### **Empower Shoppers with Self-Service Tools**

Added a release note to the Commerce section announcing the availability of the new Storefront Reference Architecture (SFRA) Order Management cartridge for shopper self-service.

# May 24, 2021

#### See All of a User's Activity on Their Profile Page

Updated the title and clarified that you must change the filter setting to All Updates for all the activities to display on the page.

#### Combine Multiple Flows into Unified Processes with Flow Orchestrator (Pilot)

Added a pilot release note for Flow Orchestrator.

#### **Provider Search Enhancements**

Added note clarifying that the Vlocity HINS package is not needed.

#### **Other Enhancements to Sales Cadences**

Clarified that to increase the sales cadence target limit, customers must contact Salesforce Customer Support.

#### Send List Email With Your Email Account (Pilot)

Clarified the requirements for using the pilot feature.

# May 17, 2021

#### Metadata API

Added new invocable actions on the FlowActionCall metadata subtype of the Flow metadata type for Field Service.

#### Aura Components in the ui Namespace Are Deprecated

Added ui:scrollerWrapper to the list of deprecated components.

#### Secure Agent Is Being Retired in Winter '22

Added a note announcing the retirement of the Secure Agent feature.

#### Flow and Process Run-Time Improvements in API Version 52.0

Added a release note for accurate evaluation of percent formula fields for related objects accessed through a Get Records element.

Added a release note for bulkification of Record Update elements after loops in all triggered flow types.

#### Usage Metrics and the MetricsDataFile API Object Are Being Retired

Added a release note to the AppExchange section with the retirement timeframe.

#### **Usage Metrics Is Being Retired**

Added a release note to the AppExchange Partners section with the retirement timeframe.

#### **Prepare for the New Version of Remote Connectors**

Added details about what customers new after August 1, 2021 can expect from new connector versions.

#### **Read More Easily with Native Fonts on page 69**

Added information about the change from Salesforce Sans to native system fonts and linked from Default Font Is System UI Font on page 254.

#### Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

Enforcement of this release update is postponed to Summer '23.

#### Edit and Delete Values in Finance Transaction and Finance Balance Snapshot Picklist Fields

Added a release note about editing and deleting picklist values in certain finance transaction and finance balance snapshot fields.

# May 10, 2021

#### You Asked for It!

Added Ideas that we delivered.

#### **Get Search Results for More Objects**

Added six more objects to the newly searchable objects list: Benefit Parameter Value, Care Benefit Verify Request, Complaint Case, Document Generation Process, Loyalty Program Member Case, and Unit of Measure Conversion.

#### Compare Versions of an Article to See What Changed (Generally Available)

Added the generally available announcement for the Compare Versions of an Article feature, which was previously in beta.

#### Control Access to Sensitive Data with Restriction Rules (Beta)

Added a link to the Trailblazer Community group where the timeline for the feature's rollout is published.

#### Metadata API

Added a release note for a new invocable action on the FlowActionCall metadata subtype of the Flow metadata type.

#### **Limited Availability for Data Processing Engine**

Added a release note to callout that Data Processing Engine isn't available for Salesforce orgs in Government Cloud and Government Cloud Plus. Similar release notes were added for Financial Services Cloud and Loyalty Management.

#### **Removed: Customize Reusable Promotion Emails**

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

#### Get a Head Start on your Day with the Home Page

Removed information about the Segments and Campaigns tabs.

#### Add Badge and Trail Art to Your Content with a Simple Image Upload

Added a myTrailhead feature that lets Trailmaker Content users upload a .png file for their badge and trail art.

#### Additional Permission Required to View Async SOQL Jobs on page 248

Added release note about a change in behavior when viewing async SOQL jobs.

#### Removed: Psst! Pass It On to Other Agents or Flows

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

#### Use External Services for MuleSoft to Generate Actions in Flow Builder (Pilot)

Added a pilot release note for using external services for MuleSoft to generate actions in Flow Builder.

#### Create Quick Actions with Lightning Web Components (Generally Available)

Added the generally available announcement for the Quick Actions feature, which was previously in beta.

# May 3, 2021

#### Flow and Process Run-Time Improvements in API Version 52.0

Added a release note for a merge field that accesses a value for a group.

#### **View Consolidated Improvements and Easily Drill Into Details**

Added a release note for consolidated improvements on Lightning pages.

#### Compare Report Versions and Explore Insights with Einstein Discovery for Reports

Rename product to "Einstein Discovery for Reports".

#### Metadata API

 $Added\ two\ Experience\ Cloud\ release\ notes\ for\ the\ new\ \verb|scopedBrandingSetID|\ and\ brandingSetType\ properties\ in\ the\ ExperienceBundle\ type.$ 

#### Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Generally Available)

Changed General Availability release for the Transaction Finalizers feature to Summer '21

#### **New and Changed Objects**

Added information about the new FieldServiceOrgSettings object.

#### **Enforce OAuth Scope for Lightning Apps (Update)**

Added a new release update.

#### Flow and Process Run-Time Improvements in API Version 52.0

Added a release note for showing active currencies.

#### Measure Forecasts Your Way in Lightning Experience

Added information about the timing of the availability of custom measure forecasts.

#### **Prepare for the New Version of Remote Connectors**

Added manually-upgraded section and connectors, and removed the auto-upgraded and manually-migrated sections.

#### **Drive Sales Team Accountability with Pipeline Inspection**

Added information about the timing of the availability of Pipeline Inspection.

#### In-App Learning with Trailhead Was Renamed Learning Paths

Added a release note announcing the name change. The name was also updated in other Learning Paths release notes.

#### **New and Changed Lightning Web Components**

Added the aria-labelledby attribute for the lightning-datatable component.

#### **New and Changed Aura Components**

Added the ariaLabelledby attribute for lightning:datatable component.

#### See More Associated Objects on the Time-Based Workflow Page

Added a release note for enhancements to the Time-Based Workflow page.

# April 26, 2021

#### Removed: Strengthen Order and Order Product Actions Access Requirements by Updating Permission Sets

Removed the release note titled "Strengthen Order and Order Product Actions Access Requirements by Updating Permission Sets" because the feature was removed from the Summer '21 release.

#### Focus on Accounts by Tracking as Campaign Members (Generally Available) on page 510

Moved Account-Based Campaign Management tools from Pardot section to Campaign section, and added a pointer topic.

#### Offload Sandbox Services for Routing and Optimization

Added See Alsos.

#### **Replace Deployed Models Easily**

Added new topic and See Alsos.

#### Show Model Cards and Customize Time-Based Predictions in the Einstein Predictions Component

Added new topic and See Alsos.

#### Refine Email Open Data with IP Address Blocking

Added that we support version IPv4 IP addresses only.

#### Flow and Process Release Updates

Added release notes for flow and process release updates.

#### **New and Changed Objects**

Added new fields for Commerce Order Management objects.

# April 19, 2021

#### Salesforce Summer '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 Milestones. See key dates for the 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.
- Summer '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.
- Summer '21 Release Website. Check out the new features.
- Summer 21 Release Highlights Module. Get the Summer '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.
- 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.
- 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 Summer '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've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers and Devices for Lightning Experience	<b>▽</b>			
Ensure IE11 Lightning Experience Users Can't Access Salesforce Classic	<b>✓</b>			
Supported Browsers and Devices for Salesforce Classic	<b>~</b>			
Supported Browsers for Tableau CRM	<b>✓</b>			

# **Salesforce Overall**

Get ready for a host of new features and improvements to your Salesforce experience. Browse, buy, and manage your subscriptions in the new Your Account self-service app. Keep track of license use with the new Active Licenses tab. Support your users with enhanced Learning Paths and In-App Guidance. Boost response rates to Salesforce surveys and improve information gathering. Simplify, streamline, and extend appointment management with Salesforce Scheduler. Offer users a smarter and faster way to find information with Einstein Search.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	General Enh	nancements		
Future Requirement to Enable			~	
Multi-Factor Authentication (MFA)			<u> </u>	
Enjoy New Features and a Better User			~	
<b>Experience with Release Notes on</b>			<del></del>	
Salesforce Help				
Download Release Notes PDFs for			~	
Salesforce Releases Before Winter '16				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Browse, Buy, and Manage Your Products with the Your Account App (Generally Available)			~	
Track Your Active Licenses		~		
Enable Topics for Objects in Lightning Experience Setup		~		
Keep Working with Tab-Focused Dialogs (Update, Postponed)			~	
Visualforce Page Overrides Open in a Modal in Lightning Console			~	
Read More Easily with Native Fonts		~		
See More Clearly When Using a Custom Theme		~		
PDF Report for Salesforce Optimizer Is Being Retired			~	
Power Up Recently Viewed Lists with Customizable Actions	~			
	User Enga	agement		
Learning Paths (Generally Available)				
In-App Learning with Trailhead Was Renamed Learning Paths	~			
Control the Visibility of Learning Paths			~	
Keep Training on Track with Due Dates and Learning Home	~			
Enhance Training with Custom Learning Items			~	
Track Users' Progress with Learning Paths Reports (Beta)			~	
In-App Guidance				
Point to Specific Elements on a Page with Targeted Prompts (Beta)		~		
Show Your Users Three Custom Walkthroughs for Free		~		
Create In-App Guidance with Revised Permission Requirements		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Let Users See Their Snoozed In-App Guidance When They Want		~		
Get Personalized Guidance When You Need It		~		
Learn About Salesforce In-App Content		~		
	Salesforce	e Surveys		
Distribute Surveys to Many Participants at a Time	~			
Collect Supporting Documents Through Survey Responses	~			
Embed a Like or Dislike Question in an Email Template	~			
	Salesforce	Scheduler		
Set Operating Hours for Service Territory Members to Work on Appointment Topics			<b>~</b>	
Schedule Resources with a Lightning Platform Starter License			~	
Choose How Many Days' Time Slots to Preload in the Salesforce Scheduler Flows			~	
Get Resources and Available Time Slots Through New Apex Methods			~	
Debug a Salesforce Scheduler Flow as Another User			~	
	Sea	rch		
Einstein Search (Generally Available)				
Get Einstein Search Now in Essentials Edition			~	
Take Advantage of New Fields for Natural Language Searches			~	
Use Non-English Words with Natural Language Search			~	
Use Knowledge Advanced Search with Einstein Search			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)			~	
Get Search Results for More Objects	<b>✓</b>			

# **Analytics**

Analyze and update your data at the same time with inline editing from the Report Run page in Lightning Experience. Experiment fearlessly in Tableau CRM Data Prep recipes knowing you can undo changes and revert to previous versions. Fast-track dashboard building by copying and pasting widgets across Tableau CRM dashboards. See what's changed in your data analysis between report runs with Einstein Discovery in Reports.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Reports and	Dashboards		
Update Fields from the Report Run Page with Inline Editing (Beta)	<b>✓</b>			
Auto Add Fields to Custom Report Types (Generally Available)	<b>✓</b>			
Download a Dashboard Image to a File	~			
	Tablea	u CRM		
Data Integration				
Prepare for the New Version of Remote Connectors			~	
Output Prepared Data from Tableau CRM into Salesforce with the Salesforce Output Connector (Generally Available)			~	
Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Generally Available)			~	
Tableau CRM Output Connector Limits Were Changed	<b>~</b>			
Microsoft Azure SQL Data Warehouse Connector is Now Called Microsoft Synapse Analytics Connector	✓			
Access Salesforce Data Without Data Sync Using Direct Data (Pilot)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Schedule Recipe and Dataflow Runs after Other Runs Complete			~	
Restore Recipes with Version History	<b>✓</b>			
Undo Changes to a Recipe	~			
Connect, Join, and Append Data with Enhanced Graph Interactions	~			
Enhance Data Prep Calculated Formulas with New Functions			~	
Build More Capable Data Prep Formulas with Expanded Column Name Support			~	
Anticipate the Future with Time Series Forecasting (Generally Available)	~			
Find New Ways to Segment Your Data with Clustering (Generally Available)	~			
Analyze Aggregated Data from More Angles with Pivoting (Generally Available)	~			
Run Recipes Faster with Input Caching	~			
Preview Recipes Faster	~			
Prebuilt Templates and Apps				
Get Insights About Your Communications Cloud with Analytics for Communications - Business			<u>~</u>	
Enhance Your Customer Experience with Analytics for Communications - Consumer			~	
Stay on Top of Your Sales Goals in the Updated Revenue Operations Analytics	~			
Reveal Hidden Insights with Increased Granularity and Control in Revenue Operations Analytics	~			
Improve Your Win Rates from Anywhere with the Revenue Operations Sales Manager Embedded Dashboard	~			
App Building				
Supercharge Productivity When You Copy and Paste Widgets Across Dashboards	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add Richness to Your Dashboard Insights with Enhanced Text Formatting	<b>~</b>			
Create and Manage Templates Directly in Tableau CRM Analytics Studio	<u>~</u>			
Use SQL with Tableau CRM Direct Data (Generally Available)			~	
Try Out Custom Time Zones Without the Big Commitment (Beta)	<u>~</u>			
Get More Column Options and Windowing Functions for Blended Data	<u>~</u>			
Navigate and Explore Direct Data in Compare Tables	<b>~</b>			
Find Dashboards and Datasets by Field Using Semantic Search	<b>~</b>			
What's New In SQL and SAQL		~		
Do More with Null Values in Dimensions and Dates (Beta)			~	
Use Dashboards with Improved Accessibility	~			
Einstein Discovery				
Compare Report Versions and Explore Insights with Einstein Discovery for Reports	<u>~</u>			
Increase Prediction Transparency with Model Cards (Generally Available)	<u>~</u>			
Impute Missing Values to Improve Model Performance (Generally Available)	<b>~</b>			
Get Better Predictions with Typographic Fuzzy Matching (Generally Available)	~			
Implement External Models in Your Salesforce Org (Pilot)				~
Predict Outcomes for Multiple Categories with Multiclass Models (Pilot)				~
Show Time-Based Predictions Using Relative Start Dates	~			
Monitor Prediction Requests Across All Deployed Models	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Translate Unstructured Data into Valuable Insights with Sentiment Analysis in Einstein Discovery (Pilot)		·	·	<b>~</b>
Get Quick and Insightful Analysis With Insight Summary Panels	<b>~</b>			
Consume Einstein Discovery Story Insights Anywhere	<u>~</u>			
Preserve Filtered Lenses in a Story	~			
Replace Deployed Models Easily	<u>~</u>			
View Consolidated Improvements and Easily Drill Into Details	<u>~</u>			
Salesforce Data Pipelines				
Enrich Salesforce Data at Scale with Salesforce Data Pipelines			~	
Tableau CRM for Everyone				
Feel at Home in the New Tableau CRM Home Page	<u>~</u>			
Curate and Share Insights with Tableau CRM Collections	~			
Subscribe to Multiple Shared Collections			~	
Discover Relevant Dashboards with Smart Recommendations	<u>~</u>			
Analytics on Mobile				
Make Dashboards Instantly Interactive			~	
Move Between Dashboards and Actions Quickly with Enhanced Mobile Navigation	<u>~</u>			
Get the Latest Version of Tableau CRM for iOS and Android	~			

# Commerce

Salesforce B2B2C Commerce on Lightning Experience brings the power of the Salesforce platform to your end-to-end B2C storefront commerce solutions. B2B Commerce includes enhancements that make it easier for admins to set up the app and for store managers to manage their products, improvements to Einstein search suggestions, and new checkout and integration options. Omnichannel

Inventory provides an updated core flow action. Salesforce Order Management introduces new flows that let you manage and track return orders, the ability to use order data in Marketing Cloud, and new shopper self-service functionality.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	B2B2C Commerce (C	Generally Available)		
Unify Your Commerce Operations	~			
Quickly Launch Full-Featured Stores with B2B2C Commerce	<u>~</u>			
Create Personalized Shopping Experiences with Artificial Intelligence	<b>~</b>			
Connect Your Customer's Journey from Marketing to Sales	<u>~</u>			
	B2B Commerce for Li	ightning Experience		
The Commerce App				
Enable Commerce to use the Commerce App and Commerce Objects			~	
Add More Products to Your Store and Catalogs			~	
Product Variation Grouping Is Generally Available (GA)			~	
Customize Your Hybrid Lists in the Product Workspace	<b>~</b>			
Get a Product Hybrid List for Every Store	~			
Skip Setting Up Product Sharing Rules for Guest Browsers		~		
Review and Reorder with Order List Component		~		
Update Order Menu Item to Use Order List Component		~		
Delegate Order and Shipment Work with User Permissions		~		
Use Person Accounts as Buyer Accounts		<b>✓</b>		
Get Better Performance with Changes to BuyerGroup and BuyerGroupMember Associations		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Turn on Pre-Configured Permission Sets for B2B Commerce			~	
B2B Commerce Search				
Einstein Search Suggestions Is Generally Available (GA)			~	
Eliminate the Redirect When No Product Search Results Are Returned			~	
Sort Product Search Results			~	
Load Product Search Results and Prices Separately			~	
Get Faster Search Results			~	
B2B Commerce Checkout and Integration	ons			
Create Unmanaged and Managed Orders from Checkout		~		
Use Payment Tokens with the New Checkout Payment Component		~		
Other Changes				
Set Up Product Increment, Minimum, and Maximum Quantity Rules			~	
Order Summary History Component Is Being Deprecated		~		
	Omnichanne	el Inventory		
Omnichannel Inventory Flow Core Actions	<b>~</b>			
	Salesforce Orde	r Management		
Manage Returns with the Return Merchandise Authorization Workflow			~	
Use New Order Management Return Features in Flows	~			
Use Order Data in Marketing Cloud			~	
Empower Shoppers with Self-Service Tools			~	

# Customization

Easily see why a user or group has the record access they do, right in Lightning Experience. See new locales and up-to-date locale formats throughout Salesforce. And, enhancements to External Services give you access to a larger selection of publicly available APIs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Shar	ing		
See Record Access Reasons in Lightning Experience	~			
Share Records Owned by High-Volume Users with Unauthenticated Guest Users		✓		
Control Access to Sensitive Data with Restriction Rules (Beta)				~
	Globali	zation		
Connect with Global Customers with New Languages and Locales			~	
Prepare for Locale Format Changes	~			
Enable ICU Locale Formats (Previously Released Update)			~	
The State and Country/Territory Picklists Setup Page Was Simplified		~		
The Norfolk Island Standard Time Zone Was Renamed	~			
	External :	Services		
Legacy External Services is Being Retired in Summer '21		~		
Select Operations with the External Services Wizard		~		
Register OpenAPI Specifications up to 1.5 MB in Size		~		
Use the allOf OpenAPI 2.0 Schema Construct		~		
Use the additional Properties OpenAPI 2.0 Schema Construct		~		
Apex Object Names Can Now Be Up To 255 Characters Long		~		
Specify MIME Types		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
Apex Unit Testing With Flow And External Services	2.1.42.104.101.0301.0	<b>▽</b>	30.00	- Crubic	
Use External Services for MuleSoft to Generate Actions in Flow Builder (Pilot)				<b>✓</b>	
	Lightning A	pp Builder			
Improve Page Performance with Custom Lightning Component Analysis		~			
Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes with Rebate Types Panel and Rebate Types Tab Components			~		
Hidden Accordion and Tabs Components Now Stay Hidden During Create, Edit, and Clone		✓			
Create a Dynamic Actions Bar for Your App Page (Pilot)				~	
Use New Einstein Next Best Action Component Attribute		~			
	Fie	lds			
Protect Picklist Performance		~			
Install More Custom Fields Through AppExchange		✓			
Prepopulate Dependent Picklists with Default Values		~			
	Einstein Recomm	endation Builder			
Recommend Parts on Field Service Work Orders with a Recommendation Template			<b>V</b>		
Profiles and Permissions					
Set Expirations for Assignments on Permissions in Permission Sets and Permission Set Groups (Beta)			<b>~</b>		
Enable Permission Set Group Assignments with Expiration Dates (Beta) Option		✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Convert the Read Only Standard Profile to a Custom Profile (Update, Enforced)			~	
	AppExc	:hange		
Prepare for US Sales Tax Collection on Your AppExchange Purchases	~			
	Genera	l Setup		
Customize Access to Background Operations		~		
Save Time with Mass Actions in Split View	~			
Secure Agent Is Being Retired in Winter '22		~		

# 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 Co	omponents		
Aura Components in the ui Namespace Are Deprecated			~	
Create Quick Actions with Lightning Web Components (Generally Available)		~		
Create Styling Hooks for Lightning Web Components		~		
Monitor Lightning Component Changes in the Setup Audit Trail		~		
Deploy a New Custom Label and Component Together		~		
Event Targets Are Always Retargeted		~		
DOM API Changes May Require UI Test Updates		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Locker Sanitize Markup Changes		~		
Lightning Components Release Update	S			
Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Enforced)			~	
Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Enforced)			~	
Enable Secure Static Resources for Lightning Components (Update, Postponed)			~	
Securely Access Aura Components (Update)		~		
Enforce OAuth Scope for Lightning Apps (Update)			<b>✓</b>	
	Einstein Vision	and Language		
Einstein Vision				
Upload More Data to Enhance Model Accuracy		~		
Get More Detailed Error Messages for Einstein OCR Calls		~		
Einstein Language				
Einstein Intent and Einstein NER (Beta) Support More Languages (Beta)		~		
Get DATETIME Values in the Right Time Zone for Einstein NER (Beta)		~		
Salesforce Functions (Beta)		~		
	Visual	lforce		
Securely Call the Visualforce Remoting API (Previously Released Update)		~		
Prevent Consecutive API Navigation Calls in Visualforce Pages (Previously Released Update)		<u>~</u>		
Prevent Validation Errors in a Repeat Component		~		
	Ар	ex		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Apex Reference Information Moved from the Apex Developer Guide to the Apex Reference Guide		✓		
Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Generally Available)		✓		
Secure Apex Code with User Mode Database Operations (Pilot)		<b>▽</b>		
	AF	ય		
Deprecation and End Of Support for Platform API Legacy Versions			~	
Scan and View New Metadata API Documentation More Easily	<b>~</b>			
Warning Header		~		
Use the Default Value of Flow Screen Components for Choice Resources		~		
Additional Permission Required to View Async SOQL Jobs		~		
Deploy and Retrieve Up to 35,000 files in AppExchange Packages with Metadata API		▽		
	Packa	iging		
Do More with Branches in Unlocked and Second-Generation Managed Packages		~		
Manage Access for Apex Tests That Run at Package Version Creation		~		
Create Package Versions Based on the Upcoming Release		~		
Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update, Postponed)			~	
Distribute Access to Features with Permission Sets and Permission Set Groups		▼		
	Scratch	n Orgs		

		Enabled for administrators/	Requires administrator	Contact Salesforce to
Feature	<b>Enabled for users</b>	developers	setup	enable
Updates to Org Shape for Scratch Orgs (Beta)		~		
	Sand	ooxes		
Secure More Data Types Using Data Mask		~		
	<b>Platform Deve</b>	lopment Tools		
<b>Develop Platform Apps with Ease</b>		~		
	Lightning De	esign System		
Deprecation of BEM Notation with Double Dashes Is Postponed		~		
Default Font Is System UI Font		~		
Design Tokens Use New Salesforce Color System		~		
Lightning Design System Component Blueprint Updates		~		
	AppExchan	ge Partners		
Optimize Your AppExchange App Analytics Query Strategy with Best Practices				<b>▽</b>
Usage Metrics Is Being Retired				~
Prepare Your AppExchange Customers for US Sales Tax Collection	<b>~</b>			
See Lead Event Drivers and More in the Updated AppExchange Marketplace Analytics Dashboard		<b>▽</b>		
	Platform	n Events		
Filter Your Stream of Platform Events with Channels (Pilot)				~
Identify and Match Event Messages with the EventUuid Field		~		

# **Einstein Automate**

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (pilot). Integrate across any system with Mulesoft Composer for Salesforce. Build and deliver personalized recommendations with Einstein Recommendation Builder and Einstein Next Best Action.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
MuleSoft Composer for Salesforce	Enabled for oscis	developers		Citable
OmniStudio				~
Einstein Recommendation Builder			~	
	Salesfor	ce Flow		
Flow Builder				
Build Multicolumn Screens in Flow Builder (Generally Available)		~		
Use Is Changed in Condition Logic for Start Elements and Decision Elements		~		
Use ISCHANGED, ISNEW, and PRIORVALUE in Record-Triggered Flow Formulas		~		
Set a Default Value for Any Screen Component That Displays Choices		~		
Control Picklist Requiredness More Accurately		~		
Switch Between Choice Components When Building Flow Screens		~		
Place Fields from Your Salesforce Objects Directly on Flow Screens (Beta)		~		
Sort and Limit Data in a Collection		~		
Create Scheduled Paths in Auto-Layout (Beta)		~		
Preview More Flow Screen Components		~		
Directly Update Fields in Record-Triggered Flows		~		
Salesforce Flow Accessibility Enhancements	~			
Build Flows on a Larger Auto-Layout Canvas (Beta)		<u>~</u>		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
See Conditional Visibility on Flow Screens at a Glance		~		
Flow Debugging				
Debug Record-Triggered Flows		~		
Find Failed Flows Faster		~		
Debug Flows After Pause Elements in Flow Builder		~		
Debug a Flow to See When Transactions Are Committed	~			
Debug Flows in Auto-Layout (Beta)		~		
Read Flow Error Emails More Easily		~		
Debug Flows with One Button		~		
Flow Management				
Get Improved Performance with New Flow Interview Log Entries Limit		₹		
Permanently Filter Read-Only Fields in Flow Builder		~		
See More Associated Objects on the Time-Based Workflow Page		~		
Flow Extensions				
Generate Actions for Flow Builder from External Services for MuleSoft (Pilot)				~
Flow and Process Release Updates				
Enforce Data Access in Flow Merge Fields (Update, Enforced)			~	
Accurately Measure the CPU Time Consumption of Flows and Processes (Previously Released Update)			~	
Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released Update)			~	
Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Analyze Screen Flow Usage (Previously Released Update)			~	
Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Update, Postponed)			~	
Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)			~	
Flow and Process Run-Time Improvements in API Version 52.0		~		
	Einstei	n Bots		
Generate Utterances Fast and in Multiple Languages with Input Recommender (Beta)	<u>~</u>			
Give your Bot Knowledge Superpowers with Article Answers (Beta)	<b>✓</b>			
Launch Intent Models with Fewer Utterances	<b>▽</b>			
Get New NLP Languages for Einstein Bots (Beta)	<b>▽</b>			
Build Bots Faster with Intent Management Improvements	✓			
Create Smarter Intent Models with Language-Based Intent Sets	✓			
Say Yes to Boolean Support Upgrades	~			
	Flow Orches	trator (Pilot)		
Combine Multiple Flows into Unified Processes with Flow Orchestrator (Pilot)				~

# **Experience Cloud**

Maintain site continuity at all times with the new Service Not Available page, and protect your brand and site security with a dedicated CDN certificate. The Build Your Own (LWR) template is now more widely available, and with it, you can take advantage of a new branding system that includes color palettes for page sections. And we bid farewell to Internet Explorer 11, which is no longer supported.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable	
	Experience E	Builder Sites			
End of Support for Internet Explorer 11 in Experience Builder Sites		~			
Maintain Business Continuity with the Customizable Service Not Available Page (Generally Available)		✓			
Redirect Users to Your Experience Builder Sites		~			
Control Duplicate Content Search Using a Canonical URL		~			
Add Assistive Text to Images on Experience Builder Sites		~			
See Asset Status via the Path Component		~			
Show Model Cards and Customize Time-Based Predictions in the Einstein Predictions Component		<u>~</u>			
	Developer P	roductivity			
Build Your Own (LWR) Is Available to All		~			
Brand Your LWR Sites More Easily		~			
Usedxp Styling Hooks to Brand Your Lightning Web Components (Generally Available)		<b>✓</b>			
Use Privileged Script to Bypass Shadow DOM in LWR Sites		~			
Improve Your Site's Performance with a Dedicated Certificate for Your CDN (Generally Available)		<u>~</u>			
Hide First and Last Name Fields in SOAP API for Experience Cloud Site Users		▼			
Guest User					
Grant Unauthenticated Guest Users Access to Records Owned by High-Volume Users		✓			
Update Guest User's Email Address (Update)		<b>▽</b>			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update Guest User Licensing		~		
	Security ar	nd Sharing		
Secure HTTPS Connections Are Enforced in Experience Cloud Sites and Salesforce Sites		✓		
Protect Customers During the Login Process		~		
Protect Experience Cloud Users by Verifying Email Address Changes	<b>✓</b>			
	Other C	hanges		
Use Tabbed Navigation in Mobile Publisher Apps		~		
Improve Your Site's SEO			~	
Improve Performance for Your Site's Authenticated Users			~	
Enable Topics for Knowledge in Lightning Experience Setup		~		
See All of a User's Activity on Their Profile Page	<b>✓</b>			
Create, Edit, and Delete Tasks with the Customer Community License	<b>✓</b>			

### **Field Service**

Start workers off on the right foot with paths to guide them and give them insights into asset setup status. Keep workers on track with guided steps for completing their work with work plans, and help service managers easily manage work plans by using templates for common work plans and work steps. Let Einstein recommend parts for work orders with Recommendation Builder, or use it to build a custom recommendation to meet your business needs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Recommend Parts on Field Service Work Orders with a Recommendation Template			<u>~</u>	
Streamline Asset Setup and Celebrate Success with a Virtual Confetti Toss		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver Consistent Services with Work Plans (Generally Available)			~	
	Sched	uling		
Streamline Scheduling by Limiting Rule Validation Checks			~	
Improve the Worker-Service Match When Scheduling Appointments		~		
Offload Sandbox Services for Routing and Optimization		~		
Show Absences Next to Appointments and Shifts on the Calendar		~		
Add More Info When You Create Shifts From a Pattern			~	
	Mol	oile		
Briefcase Builder (Generally Available)			~	
Increase Transparency About Location Sharing	~			
Improve Location Accuracy for Appointment Assistant	~			

### **Industries**

Industry-specific solutions are more intelligent and more flexible. Financial Services Cloud helps manage consent and disclosure authorizations with the Intelligent Document Automation feature. Health Cloud simplifies and optimizes appointment scheduling with intelligent recommendations. Consumer Goods is more convenient than ever, with a setup assistant and desktop support for visit execution. Manufacturing Cloud makes it easier to revise sales agreements and filter forecasts and schedules. Loyalty Management lets you personalize promotions and customize and benefit actions, and Rebate Management delivers new ways to manage and calculate payouts. Public Sector Solutions introduces tools to automate data entry and mapping, improving quality and efficiency. Sustainability Cloud adds features for filtering and visualizing energy performance and emissions. Data Processing Engine, Decision Table, and Batch Management give you new fields and functionality for managing and leveraging your data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Financial Se	rvices Cloud		
Financial Deal Management				
Track and Manage a Financial Deal Lifecycle	2		~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Share Financial Deals with Multiple Users or Groups			~	
Branch Management and Association E	ngine (Beta)			
Track Team Output Your Way with the Association Engine (Beta)			~	
Measure Performance with Branch Management Reportable Objects			~	
Intelligent Document Automation				
Manage Locale-Specific Consent and Disclosure Document Versions	<u>~</u>			
Generate Consent Authorization Requests On Demand	~			
Gather Consent and Disclosure Authorizations from Customers	<b>~</b>			
Interaction Summaries				
Find Interaction Summaries Faster with Improved Search			~	
Share Interaction Summaries or Interactions with a Reimagined and Intuitive Interface			~	
Access Interaction Summaries on the Go			~	
Insurance for Financial Services Cloud				
Policy Component Enhancements			~	
Customize Your Analytics for Insurance App Data			~	
Actionable Relationship Center (ARC)				
Add Members to a Household in ARC	~			
Show or Hide Related Lists in ARC	<u>~</u>			
Intelligent Form Reader				
Auto-Generate Mappings			~	
Get Improved Navigation Between Custom Form Pages			~	
Share Form Fields Across Mappings for Document Type			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Your Partially Mapped Form Fields			~	
Customer 360 Guide for Retail Banking				
Explore Retail Banking Business Scenarios			~	
Solve Cross-Cloud Solutions with Salesforce Solution Kits		~		
Other Financial Services Cloud Changes				
Add Task Dependencies to Action Plans			~	
New and Changed Objects in Financial Services Cloud		~		
REST API		~		
Limited Availability for Data Processing Engine		~		
	Health	Cloud		
Intelligent Appointment Management			~	
Provider Network Management Add-Or	n for Health Cloud			
Integrate Providers into Your Network with the New Health Cloud Data Model		~		
Provider Search Enhancements				
Update Searchable Fields on Demand			~	
Specify Required Provider Search Fields			~	
Copy Provider Search Results to Address Member Queries Faster			~	
Streamline Selection With Dependent Picklist			~	
Use Multi-Select Picklists to Get Better Provider Search Results			~	
Help Users Find Providers Faster			~	
Upsert Provider Records		~		
Start Your Journey with the Health Cloud Provider Call Center Learning Map	~			
FHIR R4 Support Enhancements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Store More Types of Clinical Data in Health Cloud		~		
Get Enhanced Alignment with FHIR Resources		~		
Run Reports on the FHIR R4-Aligned Data Model		~		
Enable Site User Access for Objects in the Clinical Data Model			~	
Utilization Management				
Streamline Utilization Management for Better Patient Care		~		
Capture Accurate Information Using FHIR R4-Aligned Fields		~		
Give Experience Cloud Users Access to Utilization Management Objects		~		
Intelligent Document Automation				
Manage Locale-Specific Consent and Disclosure Document Versions	<b>~</b>			
Generate Consent Authorization Requests On Demand	<b>~</b>			
Gather Consent and Disclosure Authorizations from Customers	<b>~</b>			
Intelligent Form Reader				
Auto-Generate Mappings			~	
Improved Navigation Between Custom Form Pages			~	
Share Form Fields Across Mappings for Document Type			~	
Save a Draft of Your Mappings			~	
Enable Site User Access for Health Cloud		~		
Optimize Person Accounts				
New and Changed Objects in Health Cloud		~		
Connect REST API		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable			
Apex: New Items		•	•				
Consumer Goods Cloud							
Make Virtual Visits with the Consumer Goods Visit Execution App			~				
Get Going with the Consumer Goods Setup Assistant			~				
Ensure Better Visit Execution with Signature Tasks			~				
Improve Visit Planning with Salesforce Calendar Integration			~				
Manage Availability with Account Hierarchy for Products (Pilot)			~				
Other Enhancements to Consumer Goods Cloud			~				
	Manufactu	ring Cloud					
Revise Sales Agreements to Adapt to Customer Requirements			~				
Manage Account Forecasts and Sales Agreement Schedules with Time Filters			~				
Manufacturing Cloud Has a New Invocable Action		~					
Manufacturing Cloud Has a New Action Type Value		~					
	Loyalty Ma	nagement					
<b>Customize Reusable Promotion Emails</b>		~					
Loyalty Management Objects Available in Marketing Cloud Connect		~					
View Member Information from Any Salesforce Application		~					
Integrate with Service Cloud		~					
Get a Head Start on your Day with the Home Page		~					
Use Included Templates to Create Benefit Actions		<b>▽</b>					

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Define Input Variables in Benefit Actions	Enabled for oscis	v v	3C10P	Cirabic
Validate Partners and Partner Products in Transaction Journals		~		
Set Field-Level Security		~		
Enable End-User Languages		~		
View and Track Points Earned Through a Promotion		<b>▽</b>		
Verify Segment Membership		~		
Enable the Fulfillment of Promotions Through a Flow Template		~		
Select the Enrollment Required Checkbox to Enter Enrollment Details		<b>▽</b>		
View Promotions Associated with a Campaign		~		
View Vouchers Associated with a Transaction Journal		~		
Run Loyalty Programs on Hyperforce				~
Limited Availability for Data Processing Engine		✓		
New and Changed Objects in Loyalty Management		~		
Loyalty Management Has a New Metadata Type		~		
Loyalty Management Has a New Tooling API Object		~		
	Rebate Ma	nagement		
Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes			~	
Create and Manage End-to-End Ship and Debit Programs			~	
Manage Rebate Payouts for Account Hierarchies			~	
Calculate Your Potential Liability Against Rebate Programs			<b>▽</b>	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Calculate Payouts for Rebate Transactions with Multiple Units of Measure			~	
New and Changed Objects for Rebate Management		~		
Increase Your Rebate-Driven Sales with Einstein Discovery for Rebate Management (Beta)			<b>~</b>	
Rebate Management Has a New Invocable Action		~		
Rebate Management Has a New Action Type Value		~		
	Public Secto	or Solutions		
Upload Documents Efficiently with Inte	lligent Form Reader			
Capture Application Data Automatically Using Mappings			~	
Extract and Verify Information from Uploaded Documents			~	
Use Intelligent Document Automation for Public Sector			~	
Inspection Management Enhancement	s			
Generate Assessment Questions to Aid Inspectors			~	
Set Up a Sequence for Inspectors to Follow			~	
More Flexible Complaint Tracking on the Public Sector Portal			~	
New Objects in Public Sector Solutions			~	
Sustainability				
	Data Proces	sing Engine		
Find Out a Field's Hierarchy		~		
Know Your Data Trends with the Compute Relative Transformation		~		
Run a Definition Without Navigating Away		~		

		Enabled for administrators/	Requires administrator	Contact Salesforce to
Feature	Enabled for users	developers	setup	enable
Stop Definitions from Writing Back Results		✓		
Create or Edit Definitions Locally		~		
Delete Definitions You Don't Need		~		
Watch Out for Warnings		~		
Limited Availability for Data Processing Engine		~		
	Decision	n Table		
Deliver Outcomes Based on Custom Logic		~		
Provide Outcomes Based on Data from Multiple Sources		~		
Grant More Access to Experience Cloud Users			~	
Transition from the Epoch Time Format		~		
New Fields in Decision Table		~		
New Setup Object Fields in Decision Table		~		
Connect REST API		~		
	Batch Man	nagement		
Cancel a Run with a Click		~		
Resubmit Failed Records Easily		~		
Process Records in Larger Batches		~		
New Fields in Batch Management		~		
New Invocable Action in Batch Management		~		
New Action Type Value in Batch Management		✓		
Connect REST API		~		
New Fields in Batch Management Platform Event		₹.		
	Einstein Relatio	onship Insights		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Actionable Insights for a Record with Einstein Relationship Insights			~	
Explore More Object Relationships with Additional Person Record Objects			~	
Improve Data Quality by Selecting the Correct Record	<b>~</b>			
Get Relationship Insights from Web Pages with Browser Extension			~	
View Relationship Insights in Actionable Relationship Center			~	
Einstein Relationship Insights Is Compliant with Data Privacy Requirements	<u>~</u>			
	Intelligent F	orm Reader		
Intelligent Form Reader Has New Metadata Types		~		
Intelligent Form Reader Has New Tooling API Objects		~		
Tap Into Common Industries Developer Resources	<u>~</u>			

# Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for Android. Mobile Publisher for Experience Cloud lets admins configure how URLs open in the Experience Cloud app, and customize menu items to help users navigate the app.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Salesforce I	Mobile App		
Everything That's New in the Salesforce	e Mobile App			
Salesforce Mobile App Requirements Have Changed	~			
Settle in to Mobile Home for Android (Beta)			~	
Search Smarter on Mobile with Einstein Search (Generally Available)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhanced Mobile Security Setup UI (Generally Available)				<u>~</u>
See the Full Picture on Tablets (Pilot)			~	
	Mobile P	ublisher		
Configure the Navigation Tab Bar (Generally Available)			~	
Manage How URLs Open in the Experience Cloud App (Generally Available)			~	

# myTrailhead

Create modules and trails with confidence and ease: Trailmaker Content saves your changes to the cloud and lets you upload files for your badge and trail art. Customize the role and level filters on myTrailhead to reflect your company's content and business needs. Salesforce Identity for myTrailhead users can access myTrailhead and public Salesforce Trailhead from the same login and create trailmixes with content from both sites.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Trailmaker Content Has Your Back	~			
Add Badge and Trail Art to Your Content with a Simple Image Upload	<u>~</u>			
Motivate Your Trailblazers with the Today Page	<u>~</u>			
Add and Delete Custom Role and Level Filters on myTrailhead			<b>✓</b>	
See myTrailhead and Salesforce Trailhead Content via the Same Login with Salesforce Identity for myTrailhead	<b>~</b>			
Simplify Metadata for myTrailhead Trails and Modules			~	

### **Pardot**

Use the power of Einstein to better understand your accounts and boost email engagement with Einstein Send Time Optimization. We also improved Pardot Object Sync and made it generally available along with account-based campaign management tools. You can

also upgrade your mailability model for simplified email marketing settings and enjoy new and improved developer docs that make it easier to use Pardot APIs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Marketer E	xperience		
Engagement Studio Metrics Formulas Were Changed	<b>✓</b>			
List Email Reporting Pages Were Changed	~			
Get More Clarity and Control on Email Marketing Settings			~	
Mark List Emails in Lightning as Operational				
View List Email Statistics in Less Time	~			
Make Sure Emails Have the Right Dynamic Content	~			
	Data and	Analytics		
Boost Email Engagement with Einstein Send Time Optimization			~	
Qualify Your Best Accounts with Al			~	
Set Up Your Image Repository Faster with a Default CDN Domain			~	
Enhancements to Pardot Object Sync (Generally Available)			~	
Track Accounts as Campaign Members			~	
	Platf	orm		
Designate a Marketing Admin to Handle Pardot Setup Tasks			~	
	Pardot API: New a	nd Changed Items		
Get More Done with Better Pardot Developer Docs	<u>~</u>			

### Revenue

Update permissions, assign new permission sets, and enable settings for permissions and browser performance improvements. Use a new required picklist.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Salesfor	·		
Assign and Test Access Permission Sets for Data Security			✓	
Enable Browser Performance Improvements for Salesforce CPQ (Update)			<b>V</b>	
	Salesford	e Billing		
Use the Business Category Picklist in Customer Asset Lifecycle Management			~	
Credit Notes Created with Cancel and Rebill Now Inherit Tax and Billing Rules from Invoice Line			<b>~</b>	
Edit and Delete Values in Finance Transaction and Finance Balance Snapshot Picklist Fields			~	

### Sales

Pipeline Inspection gives sales teams a single pipeline view and helps them focus on the most important deals. Create and manage forecast types to get more options and an improved experience. Get more refined email engagement data and improved email templates. Help sales reps adopt and adhere to company policies and COVID-19 safety protocols using flows in Salesforce Maps. Salesforce Meetings gives reps more insights to help keep deals moving. Einstein Conversation Insights is available for service agents.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Pipeline Ir	nspection		
Drive Sales Team Accountability with Pipeline Inspection			~	
	Core Sales	Features		
Collaborative Forecasts				
Get an Improved Experience from Forecast Types in Setup		~		
Measure Forecasts Your Way in Lightning Experience			~	
Campaigns				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Focus on Accounts by Tracking as Campaign Members (Generally Available)			~	
Orders				
Provide Patch Upgrades for Non-Lightning Flow 1GP Packages that use New Order Save Behavior	~			
Other Changes in Core Sales Features				
Connect with Customers and Prospects via LinkedIn with Our Native LinkedIn Sales Navigator Integration			~	
Original Territory Management Was Retired		~		
Delete Your Original Territory Management Sharing Records (Update)			~	
Attributes Added to ForecastingItem		~		
	Productivit	y Features		
Einstein Activity Capture				
Use a Service Account with Microsoft Exchange			~	
Sync Internal Events			~	
Troubleshoot Einstein Activity Capture Connection Issues More Easily		~		
Include Google Meet Details on Google Calendar Events			~	
Prevent Sensitive Information from Appearing on the Activity Timeline	<u>~</u>			
Find Einstein Activity Capture Settings Faster		~		
Dialer				
Record Calls by Default		~		
Email Experience				
Refine Email Open Data with IP Address Blocking			~	
Select Auth Type for Email Relay			~	
Learn More with Email Reporting	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add Flair to Emails with Web-Safe Fonts	<b>✓</b>			
Send List Email With Your Email Account (Pilot)				<b>✓</b>
Email Templates				
Let Admins Create Managed Packages Without Email Template Builder Permissions		~		
Include Email Template Attachments Automatically in Packages and Change Sets		~		
Fix Email Builder Templates Easily with Improved Error Handling	~			
Add Flair to Email Templates with Web-Safe Fonts	~			
Control When to Close HTML Tags	~			
Salesforce Inbox				
Inbox Mobile App	~			
Calendar				
See Event Organizer Names on Attendee Events	~			
Create Recurring Events from the API		~		
Monthly Events Automatically Start on Today's Date	~			
	Salesfor	ce Maps		
Salesforce Maps				
Automate Safety Protocols for Customer Visits			~	
Map Customer Data from Proprietary and Third-Party Systems			~	
Specify Which Custom Actions Appear for Each Base Object			~	
Map New Shape Layers		~		
Other Enhancements in Salesforce Maps		~		
Salesforce Maps Advanced				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Plan Visits and Routes When Appointments Overlap		~		
Prevent Certain Events from Appearing on Schedules			~	
Other Enhancements in Salesforce Maps Advanced		~		
Salesforce Maps Territory Planning				
Plan Territories That Align with Leadership's Targets			~	
Grant Access to Areas in Alignments			~	
Copy and Update Data Sets			~	
Map New Container Sets		~		
Other Enhancements in Salesforce Maps Territory Planning		~		
	Salesforce	Meetings		
Take Action on Attendee Details Without Leaving the Meeting Digest	<u>~</u>			
Get More Insights to Keep Deals Moving Forward	<u>~</u>			
Add Components to Optimize the Meeting Digest		~		
Get Zoom Integration Features with Salesforce Meetings			~	
Add the Meeting Digest to a Meeting In Microsoft Teams			~	
	Einstein Conver	rsation Insights		
Use Conversation Insights Without High Velocity Sales				~
Use Conversation Insights with Service Agents				~
Add Service Cloud Voice as a Conversation Insights Recording Provider			~	
Comment on Call Segments	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Share Video Calls	~			
Make Observations on Video Records with Chatter	<b>~</b>			
Match Video Call Participants with Their Records	<b>✓</b>			
Add Video Calls to Collections	<b>✓</b>			
	High Velo	city Sales		
Report on Engagement for Leads, Contacts, Users, and Sales Cadences			~	
Sales Cadences				
Connect with Prospects via LinkedIn with Sales Cadences			~	
See the Engagement Success of Each Sales Cadence Step			~	
Other Enhancements to Sales Cadences	<b>✓</b>			
	Sales Clou	d Einstein		
Score Lead Segments Separately for More Accurate Results			~	
Enable Einstein Lead Scoring Easily with Guided Setup			<u>~</u>	
	Integration	with Google		
<b>Gmail</b> <sup>™</sup> <b>Integration</b>				
Exclude Internal Email Tracking Data in the Gmail Integration with Inbox			~	
Lightning Sync for Google				
Include Google Meet Details on Google Calendar Events			~	
Check Out What's New with Einstein Activity Capture for Google Users			~	
	Integration w	ith Microsoft <sup>®</sup>		
Bring Salesforce and Microsoft Teams Together (Generally Available)			~	
Outlook® Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Outlook Integration Available with macOS Big Sur	~			
Set Up the Outlook Integration Without Public Exchange Web Services			~	
Install the Outlook Integration from a File Instead of Microsoft AppSource		~		
Exclude Internal Email Tracking Data in the Outlook Integration with Inbox			~	
Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending			~	
Lightning Sync for Microsoft® Exchange	8			
Check Out What's New with Einstein Activity Capture for Microsoft Users			~	
Review Microsoft Announcements on Basic Authentication Retirement for Exchange Online			~	
Salesforce for Outlook				
Action Menu No Longer Available			~	
Restore Access If Service Is Interrupted			~	
Find Version-Specific Salesforce for Outlook Release Notes	~			
	Other Changes in	the Sales Cloud		
Know Where Your Activity Data Is Stored		~		
Connected Accounts Page Was Renamed	~			
New Location for Activity Storage Information		~		

# Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Salesforce Anywhere. Use templates in more places with the Template Library in Lightning Experience, streamline your template process with template live apps, and update live Salesforce data from anywhere. Measure and report on your users' document engagement with Quip metrics in Tableau and Tableau CRM.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
When to Expect Salesforce Anywhere Features	✓			
Access Your Templates from the Lightning App Builder	<b>✓</b>			
Keep a Record of Your Customer Documents with PDFs in Salesforce Flow	<b>~</b>			
Simplify Your Template Setup with Template Live Apps	<b>~</b>			
Report on Quip Document and User Engagement from More Places	<b>~</b>			
Update Your Salesforce Data on the Go	<b>✓</b>			
Learn About Changes to Salesforce Anywhere Beta	<b>~</b>			
Get the Enhanced Salesforce Anywhere Experience	~			

# Salesforce CMS

Take more control of your Salesforce CMS content. Manage publication schedules, share content through the Experience Cloud Content Delivery Network (CDN), edit custom content types, and view details about your CMS Experiences and where they use CMS content at a glance.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create and Manage Content Publication Schedules in Salesforce CMS		✓		
Share CMS Content through a Default Domain in Public Channels			~	
Edit Existing Salesforce CMS Custom Content Types		~		
Access CMS Content with an LWC Wire Adapter (Beta)		~		
See More Details About Your Site on the CMS Experiences Page		~		
Locate CMS Image Content References by Site		~		

# Security and Identity

Preview Multi-Factor Authentication Assistant behavior before you deploy it. URL redirects and OAuth 2.0 flows are more secure and efficient. You can now update users' email addresses more easily and securely. HTTPS is required for Salesforce domains, and enhanced domains meet browser security requirements. Encrypt the User Email field (beta). Learn more about API version use with the new API Total Usage event type. Security Center now integrates with Threat Detection (beta). For sites, improve page load times with caching and update guest user licenses.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Identity and Acce	ess Management		
Manage Your Customer Identities in a Central Location with Salesforce Customer Identity Plus		<b>✓</b>		
Get More Guidance from the Multi-Factor Authentication Assistant			~	
Get Assigned Scopes with Access Tokens in the OAuth 2.0 JWT Bearer Flow		~		
Improve Performance Times of the OAuth 2.0 Hybrid App Flows		~		
Give Authorized Access to Salesforce CDP Ingestion API Data		~		
Redirect Expired Tabs to a Custom Logout URL		~		
Require Password Changes for Email Address Updates		~		
Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Enforced)	✓			
Block Customer Redirects to Unknown URLs		~		
Identity Connect 2.1 and Identity Connect 3.0.1.2 Are Being Deprecated		~		
One-Time Passwords Are Getting Longer in Winter '22		~		
	Dom	ains		
Enable Enhanced Domains (Update)			~	
Redirect Site Traffic to Your Custom Domain			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Secure HTTPS Connections Are Enforced in Domains		~		
Allow Only Secure Connections to Your Domain with HSTS Preloading		~		
Deploy a My Domain (Previously Released Update)			~	
	Salesford	e Shield		
Shield Platform Encryption				
Encrypt Contact Point Information			~	
Encrypt Your Users' Email Addresses (Beta)			~	
Event Monitoring				
Get Information About User Type in the EventLogFile		~		
Track API Version Use with the API Total Usage Event		~		
See Threat Detection Metrics in Security Center (Beta)		~		
Monitor Changes to Permission Sets and Permission Set Groups (Pilot)				~
	Security	Center		
Threat Detection Metrics (Beta)			~	
Metric Details Date Ranges			~	
	Other C	hanges		
Cache Your Site's Visualforce Pages for Authenticated Users			~	
Update Site Guest Users to the Latest License		~		
Secure HTTPS Connections to Third-Party Domains Are Enforced		~		
Set Preferences for Allowed Cookies for Salesforce Sites		~		
View Source IP Addresses in Your Private Connect Inbound Connections		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Private Connect Is HIPAA Compliant		~		
Add More Trusted Domains for Inline Frames		~		

### **Service**

Enjoy new Service Cloud tools that help you scale and streamline your business to provide a unified service experience powered by automation. Increase your time to value with the Service Setup Assistant, which creates an optimized Service app for you and your team and now takes care of more key setup steps. Use Workforce Engagement to streamline your contact center operation with data-driven shift planning tools and a win-win feature that lets employees grow and apply their skills (hint: it involves Trailhead). Get the full power and potential of Service Cloud Voice by integrating it with the telephony provider of your choice. Learn when Einstein refreshes replies for your chat agents, and track Einstein's progress in building your predictive model for Einstein Case Classification.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Service Setup			~	
	Workforce E	ngagement		
Use Historical Data to Predict Your Workload with Intelligent Forecasting			~	
Generate Scheduling Requirements and Ensure Shift Coverage with Omni-Channel Planning			~	
Manage Agents, Shifts, and Time with S	Shift Scheduling			
Assign Many Agents to Shifts At Once with Batch Assignment			~	
Manually Assign Agents to Shifts with Get Candidates			~	
Approve Time Sheets and Time-Off Requests			~	
Give Agents Ownership with Agent Emp	powerment Tools			
Grow Your Agents' Skills and Career Development with Agent Engagement			~	
Give Agents a View of Their Work Week with Agent Home			~	
Improve Agents' Work-Life Balance with Service Resource Preferences			~	
	Chan	inels		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Voice		<u> </u>	<u> </u>	
Use Your Telephony Provider with Service Cloud Voice for Partner Telephony (Generally Available)			<u>~</u>	
Integrate Your Existing Amazon Connect Contact Center with Voice			~	
Limit and Monitor After Conversation Work (Beta)			~	
Build Tailored Solutions for Your Customers with the Service Cloud Voice Toolkit API		~		
Drill Into Call Data with Einstein Conversation Insights for Service			~	
Keep Your Contact Center Safe by Rotating Your Identity Provider Certificates			~	
Use AI to Detect Customer Intents in Real-Time Call Transcripts				~
Add User Permissions for Previous Conversation Entries			~	
Route Calls with Flows, View Real-Time Queue Metrics, and Auto-Open Relevant Records on Calls (Pilot)				<b>~</b>
Use Desk Phones with Service Cloud Voice (Pilot)				~
New Names for the Service Cloud Voice Setup Pages	~			
New Name for the Call Controls Tab and Component	~			
Service Cloud Voice Now Supported in Government Cloud			~	
Embedded Service for Web				
Add an Embedded Service Conversation Type			~	
Improve Chat Connections without Cookies		~		
Hear the Hello on Screen Readers		~		
Messaging				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add User Permissions for Previous Conversation Entries			~	
Receive Images from Customers Over Toll-Free Numbers			~	
	Rout	ting		
Connect Your Customers to the Right Service Agents Using Omni-Channel Flow (Beta)		✓		
Improve Planning and Performance with New Omni-Channel Capacity Limits		~		
Streamline After Conversation Work (Beta)			~	
	Einstein fo	or Service		
Einstein Classification				
Close Cases Fast with Einstein Case Wrap-Up (Generally Available)			~	
Create Classification Models with Ease		~		
Boost Prediction Quality with Custom Condition Filters		~		
Stay on Top of Einstein's Build Progress		~		
Complete Calls with Ease via Einstein Voice Call Wrap-Up (Pilot)				~
Einstein Article Recommendations				
Save Time with Out-of-the-Box Einstein Article Recommendations		~		
Einstein Reply Recommendations				
Discover New Replies to Put in Your Agents' Hands		~		
Find Replies Fast		~		
Show Your Chat Agents Replies in 16 Languages (Pilot)				~
	Case Man	agement		
Send Multiple Emails with Unique Templates in a Single Macro	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Case Email Alerts with Threading in the Case Feed	~			
Increase Security with Guest User Email Improvements	~			
Generate a Custom Help Center to Guide Customers to Solutions	~			
Preconfigure Lightning Templates in Case Support Settings, Web-to-Case, and Case Auto-Response Rules	~			
Send Longer Emails with the Case Email Quick Action	~			
Use a Default No-Reply Address as System Address for Case Email Notifications (Previously Released Update)	▼			
Send Case Emails with Right to Left Language Compatibility	~			
Disable Ref ID and Transition to New Email Threading Behavior (Update, Postponed)	~			
	Know	ledge		
Let the Service Setup Assistant Kick Off Your Knowledge Journey	~			
Put Articles in Your Agents' Hands with Einstein Article Recommendations		~		
<b>Expand Your Editorial Space on Articles</b> for Easier Updates	~			
Support Right-to-Left Languages in the CKEditor on Articles	~			
Find Articles Using Knowledge Advanced Search with Einstein Search			<b>~</b>	
Compare Versions of an Article to See What Changed (Generally Available)			<u>~</u>	
Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)			<u>~</u>	

# 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.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce CDP				
Customer 360 Data Manager				
Identity for Customers & Partners		~		
	Customer 3	360 Privacy		
Right to Be Forgotten Policies		~		

### **Release Updates**

Release Updates continue to provide important information about org changes and have fully replaced critical updates.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Critical Updates Node Was Removed		~		
Release Updates			~	

# **Supported Browsers**

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

#### IN THIS SECTION:

#### Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

#### Ensure IE11 Lightning Experience Users Can't Access Salesforce Classic

If your org doesn't have extended support for Internet Explorer 11, Lightning Experience—only users working in IE11 can no longer access Salesforce Classic. Previously, after receiving a message regarding the lack of support for IE11, user could choose to go to Salesforce Classic. Now the error message suggests that the user switch to a Lightning Experience—supported browser, and the user can no longer proceed to Salesforce Classic.

#### 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 include those supported for Lightning Experience with the following differences: Tableau CRM isn't supported on Apple® Safari®.

# 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.
- (1) Important: Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic ended on December 31, 2020.

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome <sup>™</sup>	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	Not supported	Not supported	Supports latest stable browser version			
Experience Builder sites	Not supported	Not supported	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 <sup>™</sup>	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.

### Ensure IE11 Lightning Experience Users Can't Access Salesforce Classic

If your org doesn't have extended support for Internet Explorer 11, Lightning Experience—only users working in IE11 can no longer access Salesforce Classic. Previously, after receiving a message regarding the lack of support for IE11, user could choose to go to Salesforce Classic. Now the error message suggests that the user switch to a Lightning Experience—supported browser, and the user can no longer proceed to Salesforce Classic.

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

**Who:** This change applies if all the following criteria are met.

- Your org doesn't have extended support for IE11.
- A user has access only to Lightning Experience, either because the user or the org doesn't have access to Salesforce Classic.
- A user is working in the IE11 browser.

Why: Salesforce wants to ensure that users who only have access to Lightning Experience can't access Salesforce Classic pages.

If you plan on continuing to use IE11 with Lightning Experience at your company, Salesforce recommends opting in for extended support for IE11 until December 31, 2020.

### Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

Where: Salesforce Classic is available in all editions.

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

	Microsoft® Internet Explorer®	Microsoft <sup>®</sup> Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome <sup>™</sup>	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 11 only	Not supported	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 include those supported for Lightning Experience with the following differences: Tableau CRM isn't supported on Apple® Safari®.

## Salesforce Overall

Get ready for a host of new features and improvements to your Salesforce experience. Browse, buy, and manage your subscriptions in the new Your Account self-service app. Keep track of license use with the new Active Licenses tab. Support your users with enhanced Learning Paths and In-App Guidance. Boost response rates to Salesforce surveys and improve information gathering. Simplify, streamline, and extend appointment management with Salesforce Scheduler. Offer users a smarter and faster way to find information with Einstein Search.

#### IN THIS SECTION:

#### General Enhancements

Enable Multi-Factor Authentication at no extra cost. Browse, buy, and manage your subscriptions with the new Your Account app. Keep track of active license usage with the new Active Licenses tab in the Lighting Usage App. Organize records by theme with Topics for Objects.

#### **User Engagement**

Learning Paths is generally available. Admins assign URLs as learning items and specify due dates. End users have a new home for viewing all learning items. In-App Guidance introduces adds targeted prompts to the lineup.

#### Salesforce Surveys

Send survey invitations to many participants in bulk. Allow your participants to share required details as attachments in survey responses. Understand your participants' preferences better by sending them a like or dislike question in the survey invitation.

#### Salesforce Scheduler

Streamline appointment scheduling by setting service resource operating hours for appointment topics. Extend the capability of Salesforce Scheduler by scheduling service resources with only the platform starter license and the Salesforce Scheduler add-on.

#### 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

Enable Multi-Factor Authentication at no extra cost. Browse, buy, and manage your subscriptions with the new Your Account app. Keep track of active license usage with the new Active Licenses tab in the Lighting Usage App. Organize records by theme with Topics for Objects.

#### IN THIS SECTION:

#### Future Requirement to Enable Multi-Factor Authentication (MFA)

On February 2, 2021, we announced a future requirement for all customers to enable MFA for their Salesforce products. To satisfy the MFA requirement, all your internal users who log in to Salesforce through the user interface must use MFA. You can turn on MFA directly in Salesforce or use your single sign-on (SSO) provider's MFA service. Salesforce MFA is available at no extra cost.

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

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

#### Download Release Notes PDFs for Salesforce Releases Before Winter '16

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

#### Browse, Buy, and Manage Your Products with the Your Account App (Generally Available)

Add products and licenses, manage your contracts, and get account support right in Salesforce with the new Your Account app.

### Track Your Active Licenses

Use the new Active Licenses tab in the Lighting Usage App to monitor your active, assigned, and available licenses. You can track data for user licenses, permission set licenses, and feature licenses. License metrics help you quickly determine if you need more licenses, or if users are assigned licenses they no longer need.

### Enable Topics for Objects in Lightning Experience Setup

Topics provide a way for your users to organize records by theme. Now you can enable topics for objects conveniently in Lightning Experience Setup. Enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**. This feature was previously available only in Salesforce Classic.

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

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

#### Visualforce Page Overrides Open in a Modal in Lightning Console

In Spring '21, when you overrode a button or tab with a Visualforce page when in Lightning Console, it opened at full width. To align with the standard New, Edit, and Clone functionality, In Summer '21, that page opens in a modal.

#### Read More Easily with Native Fonts

Lightning Experience now uses the native sans-serif font on your system or device. This change improves readability and performance and provides a better experience for users of non-Latin languages.

#### See More Clearly When Using a Custom Theme

We changed the way brand colors are calculated in Themes and Branding. We made these changes to improve contrast on screen and allow for better visual accessibility for all viewers. These changes apply to new and existing themes.

#### PDF Report for Salesforce Optimizer Is Being Retired

Start using the Salesforce Optimizer app, which analyzes more features and provides recommendations in an interactive and actionable format.

#### Power Up Recently Viewed Lists with Customizable Actions

Now you can add custom actions to your Recently Viewed lists. To be consistent with other list views, Recently Viewed lists now show the actions added to an object's list view search layout. Some actions, such as Printable View, aren't available on Recently Viewed lists. This feature originally was available in Spring '21, then temporarily removed. It's rereleased now with performance improvements and the option to disable custom actions.

### Future Requirement to Enable Multi-Factor Authentication (MFA)

On February 2, 2021, we announced a future requirement for all customers to enable MFA for their Salesforce products. To satisfy the MFA requirement, all your internal users who log in to Salesforce through the user interface must use MFA. You can turn on MFA directly in Salesforce or use your single sign-on (SSO) provider's MFA service. Salesforce MFA is available at no extra cost.

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

**When:** The MFA requirement is effective beginning February 1, 2022. The terms of service in the Notices and Licenses Information section of the Salesforce Trust and Compliance Documentation require MFA for direct and SSO logins to Salesforce products as of this date. But we encourage you to begin planning now and implement MFA as soon as possible.

**Why:** The global threat landscape is constantly evolving, and the types of attacks that can cripple a business and exploit consumers are on the rise. A key part of your security strategy is safeguarding access to your Salesforce user accounts. But used on their own, user credentials don't provide sufficient protection against threats like phishing attacks, man-in-the-middle attacks, and credential stuffing. That's where MFA comes in. It's one of the easiest, most effective ways to prevent unauthorized account access and safeguard your business and your customers' data.

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

We're here to help you get ready for the MFA requirement. To get started, check out the Multi-Factor Authentication Assistant. In Lightning Experience, from Setup, in the Quick Find box, enter MFA, then select **Multi-Factor Authentication Assistant**.

#### SEE ALSO:

Knowledge Article: Announcement of the Future Requirement to Enable Multi-Factor Authentication (MFA)

Knowledge Article: Salesforce Multi-Factor Authentication FAQ

Salesforce Help: Meet the Multi-Factor Authentication Assistant (can be outdated or unavailable during release preview)

Get More Guidance from the Multi-Factor Authentication Assistant

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

The main Salesforce Release Notes moved to Salesforce Help. There, they 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.

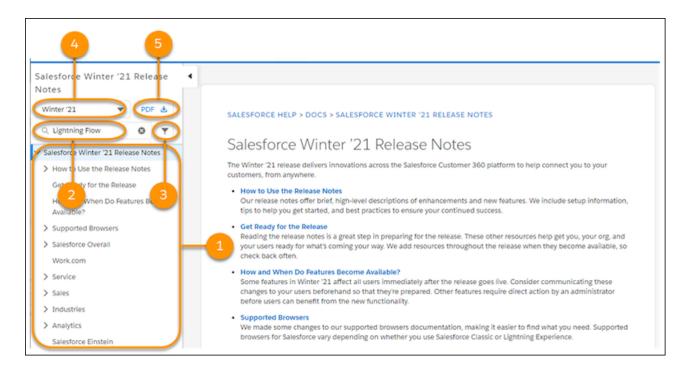
**When:** Release notes are available in HTML format on Salesforce Help for the Spring '16 through Summer '21 releases. Release notes for previous releases are available in PDF format. The original Salesforce Release Notes portal is being retired in July 2021.

**Why:** 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. 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, navigate the table of contents (1) or enter search terms (2) to get a list of results. You can filter those results (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. You can 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.



### Download Release Notes PDFs for Salesforce Releases Before Winter '16

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

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

# Browse, Buy, and Manage Your Products with the Your Account App (Generally Available)

Add products and licenses, manage your contracts, and get account support right in Salesforce with the new Your Account app.

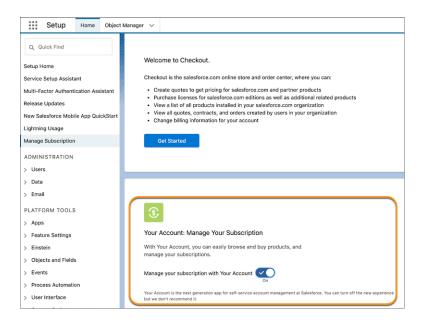
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: Admins with Manage Billing permission can turn on the Your Account app.

Why: With the Your Account app you can:

- Add seats and licenses to your subscriptions.
- Browse the catalog of available add-ons.
- See your products and the current and past contracts.
- Log a support case.
- Contact Sales for more product information.
- 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 **Manage your subscription with Your Account**. Then refresh the page.



To open the Your Account app, click Setup ( 1 ), and select **Your Account**.





**Note**: The Your Account app was named Subscription Management in pilot and beta releases.

For Essentials customers, this menu item is named Manage Subscription.

SEE ALSO:

Salesforce Help: Meet the New Your Account App (can be outdated or unavailable during release preview)

### **Track Your Active Licenses**

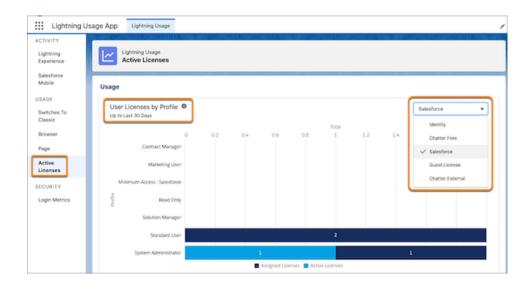
Use the new Active Licenses tab in the Lighting Usage App to monitor your active, assigned, and available licenses. You can track data for user licenses, permission set licenses, and feature licenses. License metrics help you quickly determine if you need more licenses, or if users are assigned licenses they no longer need.

**Where:** This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions. The Lightning Usage App isn't available for sandboxes.

**When:** Data for the Active Licenses tab is collected on Sunday each week. The first data becomes available on the first Sunday following your Summer '21 release deployment. For example, if the Summer '21 release is deployed for you on Monday, June 14, then active license data is available to you in the Lightning Usage App beginning on Sunday, June 20.

**How:** To access the Lightning Usage app, click **!!!**, enter Lightning Usage, and click **Lightning Usage**. In the left side pane under USAGE, click **Active Licenses**. The Active Licenses page displays the most recent usage data from the last 30 days. That is, if the most

recent usage for a license was from three days ago, the chart displays data for that day. The User Licenses by Profile chart shows the number of assigned and active user licenses by user profile. Select a user license from the picklist on the upper right to see data for profiles associated with that license. The Permission Set Licenses and Feature Licenses charts show data for active, assigned, and unassigned licenses.



### **Enable Topics for Objects in Lightning Experience Setup**

Topics provide a way for your users to organize records by theme. Now you can enable topics for objects conveniently in Lightning Experience Setup. Enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**. This feature was previously available only in Salesforce Classic.

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

SEE ALSO:

*IdeaExchange*: Include Topic Setups in Lightning Version *IdeaExchange*: Chatter Topic Management in Lightning

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

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

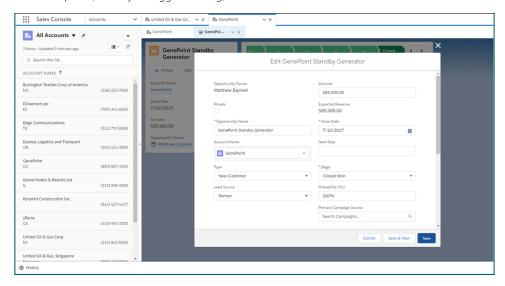
**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing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

**When:** This update was first made available in Winter '20. You can activate this update now. Otherwise, we auto-activate it in Spring '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 Update Announcements** 

# Visualforce Page Overrides Open in a Modal in Lightning Console

In Spring '21, when you overrode a button or tab with a Visualforce page when in Lightning Console, it opened at full width. To align with the standard New, Edit, and Clone functionality, In Summer '21, that page opens in a modal.

**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.

# Read More Easily with Native Fonts

Lightning Experience now uses the native sans-serif font on your system or device. This change improves readability and performance and provides a better experience for users of non-Latin languages.

Where: This change applies to Lightning Experience and the Salesforce mobile app.

**Why:** The Salesforce Sans font helped give Salesforce a consistent appearance wherever you used it, but the font had some downsides. Adopting the native sans-serif system fonts addresses those issues.

### **Improved Readability**

Each operating system's UI font is designed for optimal legibility on screens, making it easier and more comfortable for most users to read than Salesforce Sans. The system font makes Salesforce look native to the environment, leading to a smoother transition when you switch between Salesforce and other applications.

### **Better Localized Experience**

System UI fonts support languages that don't use Latin characters. Characters such as Chinese, Japanese, Cyrillic, Arabic, Greek, and Hebrew are represented in system UI fonts, but not in Salesforce Sans. For users of such languages, the Salesforce user interface appeared in a combination of Salesforce Sans and a native font such as Arial that included the required characters. Users of non-Latin languages have a better experience with the native system font.

### **Reduced Branding Conflicts**

System UI fonts are neutral. Using them prevents conflicts between the Salesforce brand and your brand in your customized Salesforce org.

### **Enhanced Performance**

System UI fonts don't require any network traffic because they're already on your computer or mobile device. Pages load much faster.

**How:** These changes appear by default.

If you use a low-resolution monitor or an older operating system where a system UI font isn't configured, Salesforce uses the system's Arial font.

If you made font-related adjustments to your components or pages such as setting line height or custom font weights, check that there are no visual regressions. You can likely remove the adjustments.

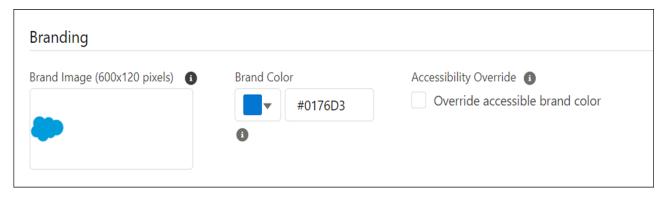
# See More Clearly When Using a Custom Theme

We changed the way brand colors are calculated in Themes and Branding. We made these changes to improve contrast on screen and allow for better visual accessibility for all viewers. These changes apply to new and existing themes.

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

**Why:** The previous algorithm mapped to WCAG 2.0. It now maps to new requirements for WCAG 2.1. Colors can appear lighter or darker than they previously did.

**How:** These changes appear by default, but you can override the new accessible brand colors in links and branded buttons by checking the **Override accessibility brand color** checkbox. But be aware that this override can make the text harder to read. And you can't override accessible brand colors in the Global Navigation Divider and status and flow components.



### SEE ALSO:

Salesforce Help: Brand Your Org in Lightning Experience (can be outdated or unavailable during release preview) External Link: Web Content Accessibility Guidelines (WCAG) 2.1

# PDF Report for Salesforce Optimizer Is Being Retired

Start using the Salesforce Optimizer app, which analyzes more features and provides recommendations in an interactive and actionable format

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

When: The Salesforce Optimizer PDF report feature is no longer available after June 2021.

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

SEE ALSO:

Salesforce Help: Run the Salesforce Optimizer App (can be outdated or unavailable during release preview)

### Power Up Recently Viewed Lists with Customizable Actions

Now you can add custom actions to your Recently Viewed lists. To be consistent with other list views, Recently Viewed lists now show the actions added to an object's list view search layout. Some actions, such as Printable View, aren't available on Recently Viewed lists. This feature originally was available in Spring '21, then temporarily removed. It's rereleased now with performance improvements and the option to disable custom actions.

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

**How:** This feature is automatically available, but if you don't want your users to create custom actions, an admin can disable it. From Setup, in the Quick Find box, enter *User Interface*, and then select **User Interface**. Select **Turn off customizable Most Recently Used (MRU) actions**, and click **Save**.

SEE ALSO:

Salesforce Help: Set Up a Mass Quick Action

# **User Engagement**

Learning Paths is generally available. Admins assign URLs as learning items and specify due dates. End users have a new home for viewing all learning items. In-App Guidance introduces adds targeted prompts to the lineup.

#### IN THIS SECTION:

### Learning Paths (Generally Available)

You already can boost user onboarding and training by assigning relevant Trailhead and myTrailhead modules to specific users on targeted pages in Salesforce. Now you can add custom links to Learning Paths and send your users to your own learning resources. You can assign a due date to each learning item to make sure users learn what's necessary to get their work done. And end users now have access to Learning Home, where they can see and act on all their learning items.

#### In-App Guidance

This release introduces targeted prompts and opens up a limited number of free walkthroughs for users. Also, it's now easier to give authoring permissions to non-admin users.

### Get Personalized Guidance When You Need It

Guidance Center is now available to all orgs, and it comes with two new sets of resources. In addition to reviewing guidance as you set up your org, get the most value out of your implementation and learn from admin best practices.

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

# Learning Paths (Generally Available)

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#### IN THIS SECTION:

### In-App Learning with Trailhead Was Renamed Learning Paths

Some sections inside the learning side panel also are renamed. Related to This Page is now Learning for You. And General Learning Content, previously named Recommended, is now Ways to Learn More. The In Progress section was removed from the panel and can be found on Learning Home.

### Control the Visibility of Learning Paths

Learning Paths is on by default in Salesforce, so you can dive in and start setting up learning assignments for your users. Until you customize Learning Paths, users see three modules suggested by Salesforce in the learning panel and on Learning Home. You can now turn off Learning Paths from the Learning Paths page in Setup.

### Keep Training on Track with Due Dates and Learning Home

Add due dates to learning assignments to help users prioritize training while they're working. With Learning Home, users have easy access inside the app to all their learning items in one place, including Trailhead and myTrailhead modules and custom links. On Learning Home, each user's learning items are sorted onto Required, Suggested, In Progress, and Completed tabs, helping users stay organized and see their progress.

### **Enhance Training with Custom Learning Items**

Supplement your assigned Trailhead and myTrailhead modules with custom links to videos, tutorials, and other helpful resources. You can assign these custom learning items to specific pages in the app and to specific users, just like you can with Trailhead and myTrailhead modules. Custom learning items also appear on Learning Home on the Required, Suggested, and Completed tabs.

#### Track Users' Progress with Learning Paths Reports (Beta)

Determine the effectiveness of your training program by creating custom reports and dashboards to monitor user engagement with Learning Paths. You can track which users are engaging with which Trailhead and myTrailhead modules, how long they're taking to complete assigned modules, and more. Reporting for Learning Paths focuses on Trailhead and myTrailhead modules. You can't report on user engagement with custom learning items.

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Learning Paths is on by default in Salesforce, so you can dive in and start setting up learning assignments for your users. Until you customize Learning Paths, users see three modules suggested by Salesforce in the learning panel and on Learning Home. You can now turn off Learning Paths from the Learning Paths page in Setup.

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

**Who:** All users have access to the Learning Paths icon in the global header and the associated learning panel and Learning Home page. Admins with Modify All Data or Customize Application can assign learning items to users via Learning Home.

**Why:** When you disable Learning Paths, admins with the Modify All Data or Customize Application permissions can still see the icon in the global header. The icon gives admins access to the Guidance Center, which offers personalized recommendations for setting up, customizing, and enhancing Salesforce.



SEE ALSO:

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

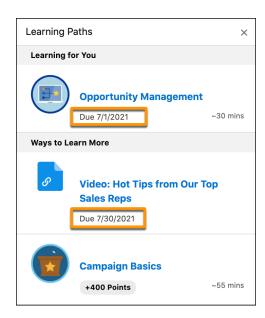
### Keep Training on Track with Due Dates and Learning Home

Add due dates to learning assignments to help users prioritize training while they're working. With Learning Home, users have easy access inside the app to all their learning items in one place, including Trailhead and myTrailhead modules and custom links. On Learning Home, each user's learning items are sorted onto Required, Suggested, In Progress, and Completed tabs, helping users stay organized and see their progress.

**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.

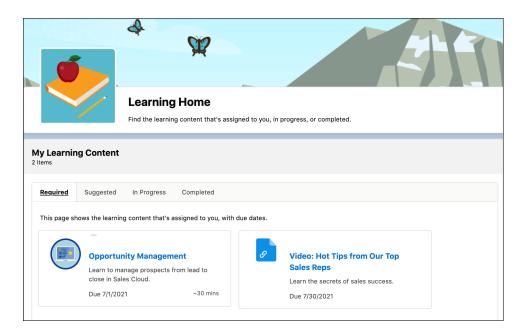
**Who:** All users have access to the Learning Paths icon in the global header and the associated learning panel and Learning Home page. Admins with Modify All Data or Customize Application can assign learning items to users via Learning Home. To grant trainers, sales enablement leaders, or others the ability to manage learning assignments, use the Manage Learning user permission.

**Why:** Due dates appear on learning items in the side panel and on Learning Home, helping users decide which learning items to tackle first.



The Learning Home page has four tabs.

Required—This tab shows all learning items with due dates.



- Suggested—When you want to assign helpful but less time-sensitive learning items to your users, leave the due date out. Then, those learning items appear on the Suggested tab. You can still assign these suggested learning items to specific objects or pages in the app so that they appear in the learning panel.
- In Progress—Users can see which Trailhead and myTrailhead modules they started on the In Progress tab. This page even shows Trailhead and myTrailhead modules that users engage with on their own on the Trailhead and myTrailhead websites.

• Completed—This tab shows all the learning items that a user has finished, letting the user savor a job well done.

#### SEE ALSO:

Salesforce Help: Learning Paths (can be outdated or unavailable during release preview)
Salesforce Help: Find Help in Lightning Experience (can be outdated or unavailable during release preview)

### **Enhance Training with Custom Learning Items**

Supplement your assigned Trailhead and myTrailhead modules with custom links to videos, tutorials, and other helpful resources. You can assign these custom learning items to specific pages in the app and to specific users, just like you can with Trailhead and myTrailhead modules. Custom learning items also appear on Learning Home on the Required, Suggested, and Completed tabs.

**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 the Learning Paths icon in the global header and the associated learning panel and Learning Home page. Admins with Modify All Data or Customize Application can assign learning items to users via Learning Home. To grant trainers, sales enablement leaders, or others the ability to manage learning assignments, use the Manage Learning user permission.

#### SEE ALSO:

Salesforce Help: Assign a Learning Item for Learning Paths (can be outdated or unavailable during release preview)

### Track Users' Progress with Learning Paths Reports (Beta)

Determine the effectiveness of your training program by creating custom reports and dashboards to monitor user engagement with Learning Paths. You can track which users are engaging with which Trailhead and myTrailhead modules, how long they're taking to complete assigned modules, and more. Reporting for Learning Paths focuses on Trailhead and myTrailhead modules. You can't report on user engagement with custom learning items.



**Note:** As a beta service, Monitoring Learning Paths is subject to the Beta Services terms at:

https://www.salesforce.com/company/legal/agreements.jsp. 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:** Admins with the Manage Learning Reporting, Create and Customize Reports, and Manage Custom Report Types permissions can create and update reports using the Learning Paths objects. Admins with Modify All Data or Customize Application can assign learning items to users via Learning Home. To grant trainers, sales enablement leaders, or others the ability to manage learning assignments, use the Manage Learning user permission.

**Why:** Get a sense of how well your training program is helping users by tracking who has completed their learning assignments and who still has modules in progress.

Find out which Trailhead and myTrailhead modules are the most popular with your users by tracking how many people complete each one.

Determine the best pace for user training at your company by monitoring how many modules you assign in a given month and how many of them are in progress, overdue, or completed.

Discover which teams or regions are the most engaged with Learning Paths, Trailhead, and myTrailhead by filtering your reports according to user fields such as manager or locale.

**How:** Create custom report types using any of these Learning Paths objects.

- Learning Content—Report on existing Trailhead or myTrailhead modules and how many points each one is worth
- Learning Content Progress—Report on the number of users who started, recently attempted, and completed particular Trailhead and myTrailhead modules
- Learning—Report on which Trailhead and myTrailhead modules you assigned, and how many users you assigned them to
- Learning Assignment Progress—Report on which users you assigned a Trailhead or myTrailhead module to, and which users started or completed each one

### SEE ALSO:

Salesforce Help: Monitor Learning Paths (Beta) (can be outdated or unavailable during release preview)
Salesforce Help: Create a Custom Report Type (can be outdated or unavailable during release preview)

# In-App Guidance

This release introduces targeted prompts and opens up a limited number of free walkthroughs for users. Also, it's now easier to give authoring permissions to non-admin users.

#### IN THIS SECTION:

### Point to Specific Elements on a Page with Targeted Prompts (Beta)

There's a new type of in-app guidance in town. It's called the targeted prompt. Connect a targeted prompt to a specific page element to show your users exactly what you're referring to.

### Show Your Users Three Custom Walkthroughs for Free

Now you can create as many walkthroughs as you want, showing your users up to three at a time. If you want to show them more, subscribe to myTrailhead. Previously, activating custom walkthroughs for your users required a myTrailhead subscription or a free trial.

### Create In-App Guidance with Revised Permission Requirements

Now you need only the Manage Prompts permission to author prompts and walkthroughs. Previously, you needed the Manage Prompts and Modify Metadata permissions. This change lets you reserve the Modify Metadata permission for admins while still allowing non-admins author in-app guidance.

### Let Users See Their Snoozed In-App Guidance When They Want

Now when users snooze in-app guidance, we respect that setting and ignore the Delay Between In-App Guidance setting. The snoozed prompt appears the next time users navigate to the page after the time they selected expires. Previously, if a user snoozed a prompt for 20 minutes for example, and the Delay Between In-App Guidance setting was set to 24 hours, the user didn't see the prompt for at least 24 hours.

## Point to Specific Elements on a Page with Targeted Prompts (Beta)

There's a new type of in-app guidance in town. It's called the targeted prompt. Connect a targeted prompt to a specific page element to show your users exactly what you're referring to.

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



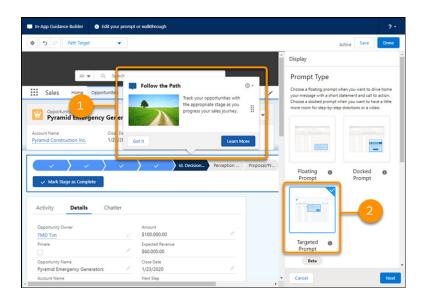
Note: As a beta feature, targeted prompts is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available

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:** To show more than three custom walkthroughs to users, subscribe to myTrailhead to get the Walkthroughs permission set license and the Access 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:** 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 **Targeted Prompts** in the Prompt Type area (1).

The targeted prompt points to the page element you select (2) so that your users can benefit from more directed guidance.



### SEE ALSO:

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

## Show Your Users Three Custom Walkthroughs for Free

Now you can create as many walkthroughs as you want, showing your users up to three at a time. If you want to show them more, subscribe to myTrailhead. Previously, activating custom walkthroughs for your users required a myTrailhead subscription or a free trial.

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

**Who:** To show more than three custom walkthroughs to users, subscribe to myTrailhead to get the Walkthroughs permission set license and the Access 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.

### SEE ALSO:

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

### Create In-App Guidance with Revised Permission Requirements

Now you need only the Manage Prompts permission to author prompts and walkthroughs. Previously, you needed the Manage Prompts and Modify Metadata permissions. This change lets you reserve the Modify Metadata permission for admins while still allowing non-admins author in-app guidance.

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

**Who:** To show more than three custom walkthroughs to users, subscribe to myTrailhead to get the Walkthroughs permission set license and the Access 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.

### SEE ALSO:

Salesforce Help: Considerations for In-App Guidance 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)

### Let Users See Their Snoozed In-App Guidance When They Want

Now when users snooze in-app guidance, we respect that setting and ignore the Delay Between In-App Guidance setting. The snoozed prompt appears the next time users navigate to the page after the time they selected expires. Previously, if a user snoozed a prompt for 20 minutes for example, and the Delay Between In-App Guidance setting was set to 24 hours, the user didn't see the prompt for at least 24 hours.

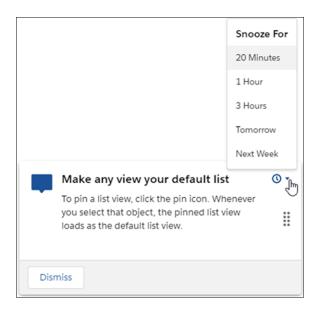
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

**Who:** To show more than three custom walkthroughs to users, subscribe to myTrailhead to get the Walkthroughs permission set license and the Access 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: Snooze in-app guidance by clicking the Snooze icon and then selecting 20 Minutes, 1 Hour, 3 Hours, Tomorrow, or Next Week.

**1** 

Note: The in-app guidance appears after the snooze time expires the next time 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)

### Get Personalized Guidance When You Need It

Guidance Center is now available to all orgs, and it comes with two new sets of resources. In addition to reviewing guidance as you set up your org, get the most value out of your implementation and learn from admin best practices.

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

Who: To see the Guidance Center, admins need the Modify All Data or Customize Application user permission.

Why: Admins gain easy access to more dependable, actionable resources wherever they are in their implementation journey.

In addition to resources for setting up Salesforce, the Guidance Center now includes:

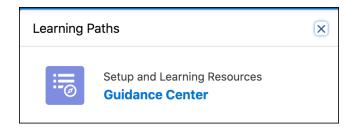
- **Get More Value Out of Salesforce**—Whether you've started thinking about your implementation goals or have defined your metrics, learn how to make Salesforce work for you. Refine your approach to people, process, and technology.
- **Learn Admin Best Practices**—Check out this trove of helpful resources for common admin responsibilities, such as managing users, building reports and dashboards, or creating custom objects.

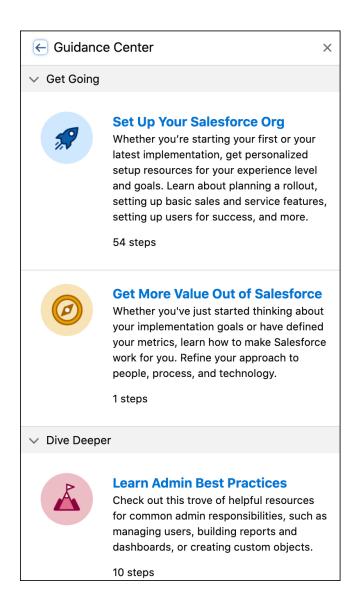
The resource sets you see depend on your Salesforce implementation. For example, we only show setup resources to new orgs.

For customers with Premier support, more resources are added to the Set Up Your Salesforce Org guidance. Review the suggested resources to learn about planning a rollout, setting up basic Sales and Service features, and setting up users for success.

**How:** Easily access the Guidance Center anywhere, anytime by clicking the icon for Learning Paths in the global header. Although the learning panel is available to all users, only admins see a link to the Guidance Center. When you first click Guidance Center inside the panel, you see a list of available resource sets with descriptions. The Get Going section helps you decide where to start. We also notify you when new sets of resources are available.







SEE ALSO:

Salesforce Help: Get Personalized Guidance While Setting Up Salesforce (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. Avoid duplicating information as you create your own prompts or other in-app content.

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

Why: Salesforce added the following in-app content.

- A docked prompt that highlights the benefits of Pipeline Inspection to users.
- A docked prompt that notifies admins that Mobile Home is the new landing page for the Salesforce mobile app.
- A floating prompt that reminds admins to return to the Service Setup Assistant to finish setting up. A second prompt notifies admins that there are changes that require returning to the assistant.

- A feature popover that highlights Einstein Search to admins.
- A feature popover that highlights the learning panel to all users.
- A welcome mat that introduces admins to Pipeline Inspection.

**How:** Turn off all 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)

# Salesforce Surveys

Send survey invitations to many participants in bulk. Allow your participants to share required details as attachments in survey responses. Understand your participants' preferences better by sending them a like or dislike question in the survey invitation.

#### IN THIS SECTION:

### Distribute Surveys to Many Participants at a Time

Collect feedback and boost the response rates by sending survey invitations to many participants. Target leads, contacts, and members of your campaign with Salesforce objects and list views. Gather information from contacts, leads, and campaign members by sending survey invitations to participants in bulk. To reduce the manual effort of adding email addresses, use objects and list views. Map survey invitations to an associated record object, and establish a context between the associated record and the distributed survey.

### Collect Supporting Documents Through Survey Responses

Now participants can upload required details in their survey responses as attachments. Collect information about profile updates such as an address change, or allow customers to upload receipts in support of warranty claims. Participants can upload documents in formats such as a document, PDF, spreadsheet, or graphic.

### Embed a Like or Dislike Question in an Email Template

Improve your response rates and understand your participants' preferences better by sending a like or dislike question in your email invitation. Email templates now support the like or dislike question along with the Net Promoter Score (NPS), Rating, and Score question types.

SEE ALSO:

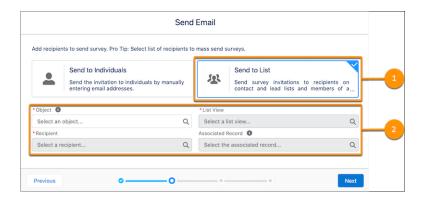
Salesforce Help(can be outdated or unavailable during release preview)

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Collect feedback and boost the response rates by sending survey invitations to many participants. Target leads, contacts, and members of your campaign with Salesforce objects and list views. Gather information from contacts, leads, and campaign members by sending survey invitations to participants in bulk. To reduce the manual effort of adding email addresses, use objects and list views. Map survey invitations to an associated record object, and establish a context between the associated record and the distributed 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 Survey Builder, click **Send** > **Send Email**. Embed either a survey link or a question in the email body, and click **Next**. Select **Send to List** (1), and define the participant group details (2) for the survey invitations. Click **Next**, and update or customize the email content by adding merge fields. Click **Next**, and review or configure the survey invitation link settings. To email the survey invitations to the selected participants, click **Send**.



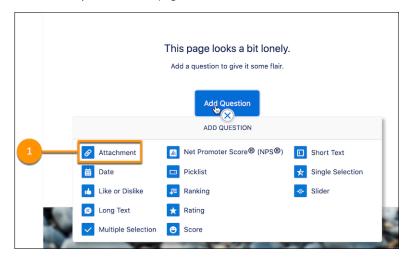
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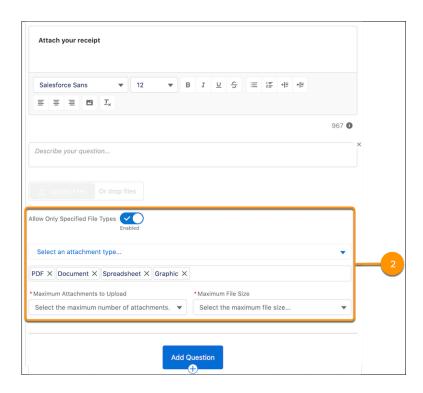
**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To upload an attachment, your users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management

**How:** In Survey Builder, add a page, click **Add Question**, and then select **Attachment** (1).



Define the configuration parameters for attachment upload (2). These parameters indicate the attachment types, number of attachments, and the size of each attachment that a participant can upload in the responses.

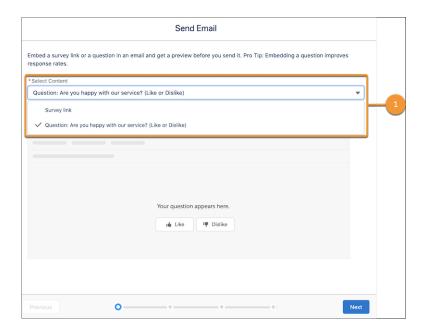


# Embed a Like or Dislike Question in an Email Template

Improve your response rates and understand your participants' preferences better by sending a like or dislike question in your email invitation. Email templates now support the like or dislike question along with the Net Promoter Score (NPS), Rating, and Score question types.

**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 Survey Builder, add a like or dislike question, save, and activate the survey. Click **Send** > **Send Email**. To embed a like or dislike question in your email template, select the question in the **Select Content** dropdown (1). To select an individual or a list of participants and continue with the wizard to configure merge fields and the survey invitation link options, click **Next**. To distribute the survey to the selected participants, click **Send**.



# Salesforce Scheduler

Streamline appointment scheduling by setting service resource operating hours for appointment topics. Extend the capability of Salesforce Scheduler by scheduling service resources with only the platform starter license and the Salesforce Scheduler add-on.

### IN THIS SECTION:

### Set Operating Hours for Service Territory Members to Work on Appointment Topics

Enable the new preference in Salesforce Scheduler settings and you can specify the operating hours that a resource can work on appointment topics (work type groups). You get more granular control over appointment topics and the operating hours for resources that are responsible for those topics. This feature uses the new Appointment Topic Time Slot junction object that's now to be used in all development. Related Salesforce Scheduler flows also use it.

### Schedule Resources with a Lightning Platform Starter License

Schedule resources with the platform starter license and the Salesforce Scheduler add-on. For example, you can schedule appointments for sales associates or healthcare providers who don't require all the CRM capabilities. With the platform starter license, service resources get access to a basic set of objects that enable them to view and update appointment details and add resource absences. The license also allows you to schedule more people than before.

#### Choose How Many Days' Time Slots to Preload in the Salesforce Scheduler Flows

Now you can customize the number of days cached for available time slots for faster loading on desktop or mobile. For example, if time slots for 7 days appear, you can specify if you want to cache for 7 or 14 days.

### Get Resources and Available Time Slots Through New Apex Methods

Developers can now easily make custom time slot screen flow components that interact with external systems. The new Apex methods call the Get Appointment Candidates and Get Appointment Slots APIs. This capability helps you easily get all the service resources and available time slots or get available slots for a resource.

### Debug a Salesforce Scheduler Flow as Another User

Test and debug a flow as another user without logging in as that user. You can troubleshoot a flow by seeing the flow's debug log as a user sees it. Catch flow exceptions such as unexpected permissions, sharing, and profile configurations before they occur in production organizations.

# Set Operating Hours for Service Territory Members to Work on Appointment Topics

Enable the new preference in Salesforce Scheduler settings and you can specify the operating hours that a resource can work on appointment topics (work type groups). You get more granular control over appointment topics and the operating hours for resources that are responsible for those topics. This feature uses the new Appointment Topic Time Slot junction object that's now to be used in all development. Related Salesforce Scheduler flows also use it.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Salesforce Scheduler enabled. This feature is enabled by default for all new organizations.

**Why:** For example, you can schedule appointments for scenarios like these:

- You can set up a banker in a branch to take Investment Banking and Retail Banking topics from 10 AM to 12 PM and Account Opening topic appointments from 1 PM to 3 PM.
- A doctor consults for the Apollo Clinic in two locations. In San Francisco, the doctor sees patients for pulmonology consultations
  every weekday from 10 AM to 12 PM. The doctor, who also specializes in immunology and allergy medicine, consults in the Oakland
  clinic every weekday from 2 PM to 4 PM.

#### How:



**Note**: Before enabling this preference, make sure that you complete the prerequisites. After you enable this preference, you can't disable it.

From Setup, in the Quick Find box, enter Salesforce Scheduler, and then select Salesforce Scheduler Settings. Enable Operating Hours for Service Territory Members for Work Type Groups.



### SEE ALSO:

Salesforce Help: Prerequisites for Setting Operating Hours for Resources Working on Appointment Topics Salesforce Help: Enable Operating Hours for Service Territory Members for Work Type Groups

# Schedule Resources with a Lightning Platform Starter License

Schedule resources with the platform starter license and the Salesforce Scheduler add-on. For example, you can schedule appointments for sales associates or healthcare providers who don't require all the CRM capabilities. With the platform starter license, service resources get access to a basic set of objects that enable them to view and update appointment details and add resource absences. The license also allows you to schedule more people than before.

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

Why: Here are a few things to keep in mind when you plan for licenses.

- Users with the platform starter license can't schedule appointments.
- You can't schedule users with an employee community license.
- Using the Salesforce Scheduler add-on with the platform starter license, you can't see opportunities or access the leads that are generated during the standard guest flow.

#### SEE ALSO:

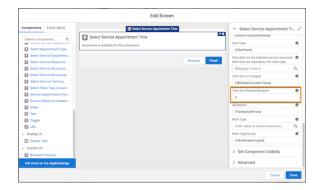
Salesforce Help: Schedule Resources with a Platform Starter License
Salesforce Help: Lightning Platform Starter and Lightning Platform Plus Details

# Choose How Many Days' Time Slots to Preload in the Salesforce Scheduler Flows

Now you can customize the number of days cached for available time slots for faster loading on desktop or mobile. For example, if time slots for 7 days appear, you can specify if you want to cache for 7 or 14 days.

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

**How:** On the Select Service Appointment Time Slot screen component, set the value of the Time Slot Preload Multiplier attribute to 1 or 2. For example, if you enter 2 and currently 7 days are displayed, the available time slots for the next 14 days are cached.



#### SEE ALSO:

Salesforce Help: Add a Time Slot Screen for an Appointment Scheduling Flow

# Get Resources and Available Time Slots Through New Apex Methods

Developers can now easily make custom time slot screen flow components that interact with external systems. The new Apex methods call the Get Appointment Candidates and Get Appointment Slots APIs. This capability helps you easily get all the service resources and available time slots or get available slots for a resource.

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

Who: User profiles with access to execute Apex classes can use the new Apex methods to get resources and available time slots.

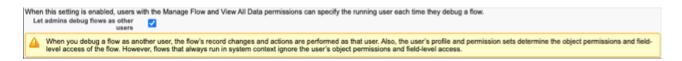
# Debug a Salesforce Scheduler Flow as Another User

Test and debug a flow as another user without logging in as that user. You can troubleshoot a flow by seeing the flow's debug log as a user sees it. Catch flow exceptions such as unexpected permissions, sharing, and profile configurations before they occur in production organizations.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Salesforce Scheduler enabled. Only non-production orgs support the ability to debug a flow as another user.

**Who:** This feature is available for admins. To use this feature, you must have the Modify All Data, Manage Users, and Customize Application permissions. To use this feature after it's enabled, you need the Manage Flows and View All Data permissions.

**How:** From Setup, in the Quick Find box, enter *Process Automation*, and then select **Process Automation Settings**. Select **Let admins debug flows as other users**.



When you need to debug a flow as another user, open a flow in Flow Builder and click **Debug**. Select **Run flow as another user**, choose the user, and click **Run**.



#### SEE ALSO:

Salesforce Help: Debug a Flow as Another User

# 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 (Generally Available)

Give your users a smarter search powered by Al. All features of Einstein Search are now generally available at no extra cost. Personalization returns relevant search results based on a user's activity. Natural language search (NLS) lets users type common words and phrases in their queries to filter search results. And the actionable UI lets your users accomplish tasks right from the search box, such as logging a case or creating a contact.

### Get Search Results for More Objects

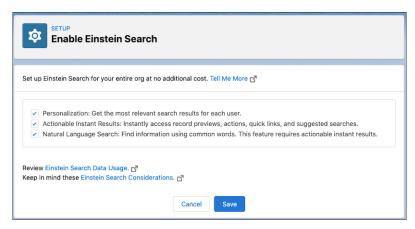
You can search for more objects and fields in your org.

# Einstein Search (Generally Available)

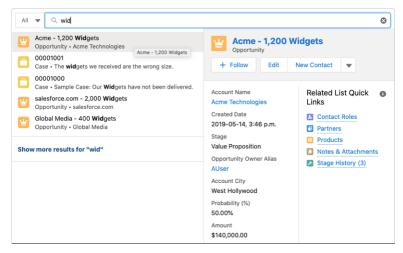
Give your users a smarter search powered by Al. All features of Einstein Search are now generally available at no extra cost. Personalization returns relevant search results based on a user's activity. Natural language search (NLS) lets users type common words and phrases in their queries to filter search results. And the actionable UI lets your users accomplish tasks right from the search box, such as logging a case or creating a contact.

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

**How:** Enable all Einstein Search features at the org level with just a few clicks. From Setup, in the Quick Find box, enter *Einstein Search*, then select **Enable Einstein Search**. Select all three checkboxes, then save your changes.



Click the global search box and see what Einstein Search has to offer.



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#### IN THIS SECTION:

#### Get Einstein Search Now in Essentials Edition

Einstein Search is now available with Essentials Edition, giving your users a global search bar powered by Al. Einstein Search offers personalization, natural language search, actionable instant results, and recommended results. All these features can improve user productivity.

### Take Advantage of New Fields for Natural Language Searches

Your users can try natural language searches that include new field values for the supported objects. These new fields help your users filter even more records.

### Use Non-English Words with Natural Language Search

Natural Language Search (NLS) offers full support for English queries and partial support for non-English queries. Your users can type queries with non-English data values such as picklist values and object names, and Einstein Search returns results regardless of language. You users also can enter queries for Accounts, Cases, Contacts, Leads and Opportunities that are renamed to reflect the local language. Searches that include non-English words for boolean field values, date expressions, operators, and stopwords don't return results.

### Use Knowledge Advanced Search with Einstein Search

Knowledge Advanced Search, now available with Einstein Search, lets your users prefilter search criteria to find knowledge articles with the most relevant information for their task. When your users select Knowledge from the global search box dropdown list, they immediately get access to the Advanced Search screen. From there they can add filters before entering search terms, then run the search.

### Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)

Salesforce Knowledge for Lightning Experience got a boost with Al. Now you can shorten the time it takes your service agents and customers to find knowledge articles that are most relevant to them. Try it by signing up for the Einstein Search for Knowledge pilot.

SEE ALSO:

Einstein Release Notes

### Get Einstein Search Now in Essentials Edition

Einstein Search is now available with Essentials Edition, giving your users a global search bar powered by Al. Einstein Search offers personalization, natural language search, actionable instant results, and recommended results. All these features can improve user productivity.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Essentials edition. But actionable instant results aren't available in the mobile app.

**How:** Enable Einstein Search at the org level with just a few clicks. From Setup, in the Quick Find box, enter *Einstein Search*, then select **Enable Einstein Search**. Select all three checkboxes, then save your changes.

SEE ALSO:

Salesforce Help: Einstein Search: Work Faster and Smarter (can be outdated or unavailable during release preview)

### Take Advantage of New Fields for Natural Language Searches

Your users can try natural language searches that include new field values for the supported objects. These new fields help your users filter even more records.

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

How: When you enter a natural language search query, you can use these objects with these new fields:

Object	New Fields
Accounts	Account Source, Industry, Type
Cases	Origin, Priority, Reason, Type
Contacts	Lead Source
Leads	Rating
Opportunities	Lead Source

#### SEE ALSO:

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

### Use Non-English Words with Natural Language Search

Natural Language Search (NLS) offers full support for English queries and partial support for non-English queries. Your users can type queries with non-English data values such as picklist values and object names, and Einstein Search returns results regardless of language. You users also can enter queries for Accounts, Cases, Contacts, Leads and Opportunities that are renamed to reflect the local language. Searches that include non-English words for boolean field values, date expressions, operators, and stopwords don't return results.

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

### SEE ALSO:

Salesforce Help: How Non-English Terms Are Handled for Natural Language Searches (can be outdated or unavailable during release preview)

### Use Knowledge Advanced Search with Einstein Search

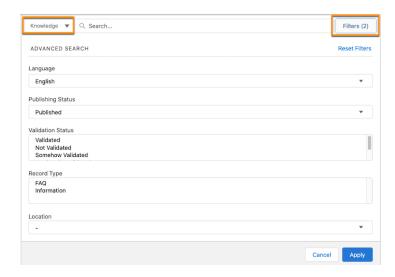
Knowledge Advanced Search, now available with Einstein Search, lets your users prefilter search criteria to find knowledge articles with the most relevant information for their task. When your users select Knowledge from the global search box dropdown list, they immediately get access to the Advanced Search screen. From there they can add filters before entering search terms, then run the search.

**Where:** This change applies Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

**How:** After a user selects Knowledge to narrow the search, select **Filters** to show the Advanced Search page. From this page, specify the values for the available filters.



Note: The advanced search filters aren't applied to list view suggestions in search instant results.



#### SEE ALSO:

Salesforce Help: Search Articles in the Global Search Box and the Knowledge Component (can be outdated or unavailable during release preview)

### Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)

Salesforce Knowledge for Lightning Experience got a boost with Al. Now you can shorten the time it takes your service agents and customers to find knowledge articles that are most relevant to them. Try it by signing up for the Einstein Search for Knowledge pilot.



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk. You can provide feedback and suggestions for Einstein Search for Knowledge at TryEinsteinSearch@salesforce.com.

**Where:** This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

**Why:** Your customers and agents can get answers to their questions even when they don't know exactly what they're looking for. For example, when searching in the Knowledge sidebar for a customer case, the most useful knowledge articles are highlighted with a Promoted label.

# Get Search Results for More Objects

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

Where: These changes apply to Lightning Experience in the designated product areas.

The objects listed are now searchable.

Object	Product Area	Found In
Activity Timing	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience

Object	Product Area	Found In
Auth Form Request Record	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Author Note	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Billing Schedule Group	Revenue Cloud	All Salesforce Billing Editions in Lightning Experience
Benefit Parameter Value	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Care Benefit Verify Request	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Care Request Reviewer	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Clinical Encounter Identifier	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Collaboration Room	Service Cloud	Essentials, Enterprise, Performance, Unlimited, and Developer editions. in Lightning Experience
Complaint Case	Public Sector Solutions	Enterprise, Unlimited, and Developer editions in Lightning Experience
Coverage Benefit Item Limit	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Diagnostic Summary Detail	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Document Generation Process	Vlocity	Enterprise, Unlimited, and Developer editions in Lightning Experience
Financial Deal	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Financial Deal Participant	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Financial Deal Party	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Financial Deal Product	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Health Condition Detail	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Info Auth Request Form	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience

Object	Product Area	Found In
Info Authorization Request	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Interaction Participant	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Medicinal Ingredient	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Loyalty Program Member Case	Loyalty Management	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Reply Text	Service Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Retail Store Group Assignment	Consumer Goods Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience
Swarm	Service Cloud	Enterprise, Professional, Developer, and Unlimited editions in Lightning Experience
Swarm Member	Service Cloud	Enterprise, Professional, Developer, and Unlimited editions in Lightning Experience
Unit Of Measure Conversion	Manufacturing Cloud	Enterprise, Unlimited, and Developer in Lightning Experience
Work Type Care Specialty	Health Cloud	Enterprise, Performance, and Unlimited editions in Lightning Experience

### SEE ALSO:

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

# **Analytics**

Analyze and update your data at the same time with inline editing from the Report Run page in Lightning Experience. Experiment fearlessly in Tableau CRM Data Prep recipes knowing you can undo changes and revert to previous versions. Fast-track dashboard building by copying and pasting widgets across Tableau CRM dashboards. See what's changed in your data analysis between report runs with Einstein Discovery in Reports.

### IN THIS SECTION:

### Reports and Dashboards

Save time by updating field values directly from the Lightning Experience Report Run page. Automatically make new custom fields for a Salesforce object available to all the custom report types based on that object. Grab and go with your dashboards by downloading them in PNG format.

#### Tableau CRM

Update Data Prep recipes with confidence knowing you can undo changes and revert to previous recipe versions. Speed up dashboard building by copying and pasting widgets across dashboards. Gain insights into your communications sales operations and allow customer service reps to optimize the customer experience. See what's changed in your data analysis between report runs with Einstein Discovery in Reports.

# Reports and Dashboards

Save time by updating field values directly from the Lightning Experience Report Run page. Automatically make new custom fields for a Salesforce object available to all the custom report types based on that object. Grab and go with your dashboards by downloading them in PNG format.

#### IN THIS SECTION:

### Update Fields from the Report Run Page with Inline Editing (Beta)

Keep the data in your reports and object records up to date while saving time and clicks. When the source data for a report gets out of date, it's not necessary to go back to the original object record to update the information. With inline editing, you can update certain types of text, numeric, and checkbox fields without leaving the Report Run page. For example, Sales reps can run an opportunity report and review and update the opportunity amounts in one place.

### Auto Add Fields to Custom Report Types (Generally Available)

It's time-consuming to add new custom fields to your reports, especially when you have many custom report types. With Auto Add, custom fields that you add to a Salesforce object are added automatically to all the custom report types based on that object. When you create a report from the custom report type, all the custom fields are right there for you to add to your report. Auto Add doesn't apply to fields that are added as part of packages. These changes apply to Lightning Experience only.

### Download a Dashboard Image to a File

For an image of your dashboard that you can embed in presentations or refer to wherever you are, download the dashboard to a PNG file. Previously, you could only obtain a dashboard image by using a screen capture app. These changes apply to Lightning Experience only.

# Update Fields from the Report Run Page with Inline Editing (Beta)

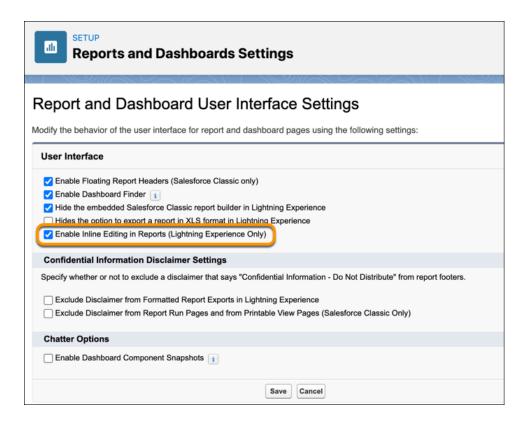
Keep the data in your reports and object records up to date while saving time and clicks. When the source data for a report gets out of date, it's not necessary to go back to the original object record to update the information. With inline editing, you can update certain types of text, numeric, and checkbox fields without leaving the Report Run page. For example, Sales reps can run an opportunity report and review and update the opportunity amounts in one place.

**Where:** These changes are available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

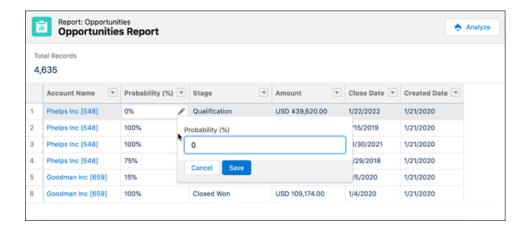


Note: As a beta feature, inline editing on the Report Run page is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. 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 IdeaExchange/X group in the Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

**How:** First, contact Salesforce Customer Support and request to have inline editing turned on. Then in Setup, from Reports and Dashboards Settings, select **Enable Inline Editing in Reports (Lightning Experience only)**, and save your changes.



You're now set to go. Open a report and hover over the text, numeric, or checkbox field that you want to edit. If you see a pencil icon, you can click it, modify the value, and then save. The field value is updated on the report and in the source record, and the report reruns automatically.



A lock icon means that the field isn't available for inline editing.



Inline editing isn't supported for these fields and field types.

- Task and event object fields
- System fields such as Record ID and Created Date
- Compound fields, including name and address fields
- Picklists
- Custom date/time fields
- Encrypted text fields
- Formula fields
- Standard fields of type date/time, auto number, rollup summary, record type, master-detail, long text area, rich text, or hierarchy
- Other fields where editing isn't permitted due to restrictions in the page layout or record type

# Auto Add Fields to Custom Report Types (Generally Available)

It's time-consuming to add new custom fields to your reports, especially when you have many custom report types. With Auto Add, custom fields that you add to a Salesforce object are added automatically to all the custom report types based on that object. When you create a report from the custom report type, all the custom fields are right there for you to add to your report. Auto Add doesn't apply to fields that are added as part of packages. These changes apply to Lightning Experience only.

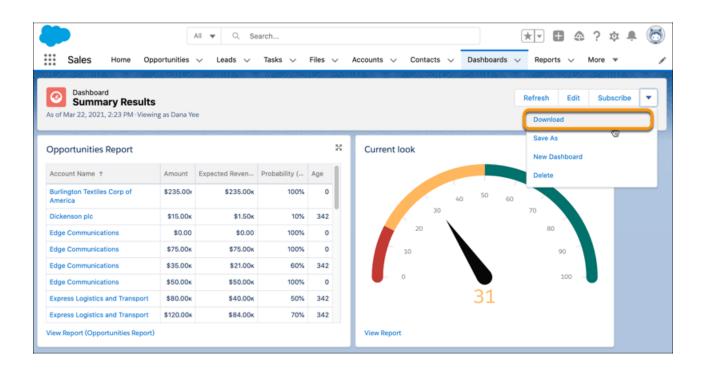
**Where:** These changes are available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

# Download a Dashboard Image to a File

For an image of your dashboard that you can embed in presentations or refer to wherever you are, download the dashboard to a PNG file. Previously, you could only obtain a dashboard image by using a screen capture app. These changes apply to Lightning Experience only.

**Where:** These changes are available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

**How:** From the dashboard, click **v** > **Download**. The dashboard is saved to your selected location in PNG format.



### Tableau CRM

Update Data Prep recipes with confidence knowing you can undo changes and revert to previous recipe versions. Speed up dashboard building by copying and pasting widgets across dashboards. Gain insights into your communications sales operations and allow customer service reps to optimize the customer experience. See what's changed in your data analysis between report runs with Einstein Discovery in Reports.

### IN THIS SECTION:

### Tableau CRM Data Integration and Preparation

Get more fearless when changing Data Prep recipes with the option to undo changes and revert to previous recipe versions. Design smarter Data Prep custom formulas with new functions and broader column support. Push recipe results into your business operations in Salesforce with the Salesforce Output connector.

### Analytics Prebuilt Templates and Apps

The Tableau CRM prebuilt templates and apps include new apps and dashboards that help you get better value from your data. Gain insights into your communications sales operations and allow customer service reps to optimize the customer experience with the new Analytics for Communications - Business and Consumer apps. Updates to the Revenue Operations Analytics app provide more granularity, control, and details to help you to make better sales decisions.

### Analytics App Building

Build dashboards faster by copying and pasting widgets across dashboards, add style to your dashboards with enhanced text formatting, and skip the developer tools when you create app templates in Analytics Studio.

### Einstein Discovery

Einstein Discovery for Reports, formerly known as Einstein Data Insights, lets you see what's changed in your data analysis between report runs. Increase prediction transparency with model cards to help you document and communicate important usage information about your predictions. Produce better models with feature engineering enhancements that let you bucket categories with fuzzy matching and impute missing values.

### Salesforce Data Pipelines

Modify and enrich your Salesforce data at scale.

### Tableau CRM for Everyone

Meet your more intuitive and personalized Tableau CRM home page, and assemble collections of Tableau CRM items from across your org to customize your home page and share analytics with your team.

### **Analytics Mobile Apps**

Minimize taps and use dashboards instantly with web tabs, and easily get back to your dashboard after you complete other tasks.

# Tableau CRM Data Integration and Preparation

Get more fearless when changing Data Prep recipes with the option to undo changes and revert to previous recipe versions. Design smarter Data Prep custom formulas with new functions and broader column support. Push recipe results into your business operations in Salesforce with the Salesforce Output connector.

#### IN THIS SECTION:

### Prepare for the New Version of Remote Connectors

To allow for future Tableau CRM remote connector enhancements, we're upgrading connector versions. New versions of connectors will work the same or better than before. Customers new to Tableau CRM after August 1, 2021 use only the new connector versions as they become available.

### Output Prepared Data from Tableau CRM into Salesforce with the Salesforce Output Connector (Generally Available)

Push your prepared Account, Opportunity, and custom object data into any Salesforce org from Tableau CRM with the Tableau CRM Salesforce Output connector and Data Prep. 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. 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. Up to 100 MB of data is written externally per run of a recipe per output connector, and up to 100 MB of data can be written per 24-hour period. This feature is now generally available.

#### Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Generally Available)

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. This feature is now generally available.

### Tableau CRM Output Connector Limits Were Changed

We pooled the limits per rolling 24-hour period for the Tableau CRM output connectors to Snowflake and Amazon S3. The limit for Snowflake Output or Sync Out and Amazon S3 Output connectors is a combined 50 GB, or 50 million rows. For example, if you push 40 GB of data from Tableau CRM to Snowflake, 10 GB of allotted data remains to push to Amazon S3.

### Microsoft Azure SQL Data Warehouse Connector is Now Called Microsoft Synapse Analytics Connector

Microsoft changed the name of its Azure SQL Data Warehouse product to Synapse, so we're renaming the connector. The connector works the same as it did before, and you don't need to make any changes.

### Access Salesforce Data Without Data Sync Using Direct Data (Pilot)

Recipes can now access data in more Salesforce objects, not just the connected ones that you sync. When using direct data, the recipe pulls the latest data directly from the Salesforce object, bypassing the data sync step. Because direct data isn't optimized for performance like connected objects, use direct data only when data sync isn't available or when the Salesforce object is used as the source for one recipe only.

### Schedule Recipe and Dataflow Runs after Other Runs Complete

Manage recipe and dataflow runs based on your business and data needs with improved event-based scheduling that waits until other runs complete. Set your scheduled runs to kick off after the needed data refreshes, or only after a required previous run completes. Previously, you set event-based schedules to run only after the related local connection synced.

### Restore Recipes with Version History

Don't be afraid to test new ideas on recipes. If you break it, you can now revert to a previous version. For those complex recipes, collaborate with others and build it iteratively. With version history, you can see which contributor updated each version along the way.

### Undo Changes to a Recipe

Use undo to revert unwanted changes to a recipe. For example, if you make 10 updates to a recipe and then accidentally delete the wrong node, you can undo the node deletion. Or you can keep undoing all actions until you undo all the changes to this version of the recipe. You can undo all actions since the last save. Use redo to restore a recipe state that was undone. Previously, you had to manually undo the changes.

### Connect, Join, and Append Data with Enhanced Graph Interactions

You can now join or append data from any node to any other node in the recipe, upstream or downstream. Previously, you could join or append only the end node to a downstream node, and duplicated a node each time you wanted to use it again in the recipe. You can now create a branch at an intermediate node, and join or append it to another path in the recipe. Also, you can now move nodes so that they flow right to left.

### Enhance Data Prep Calculated Formulas with New Functions

Build derived fields that offer more windowing and data cleanup options with three new Data Prep formula functions. Calculate the cumulative sum of a window of related rows with sum (expr). Return the number of characters in a string with char\_length (field). And find the location of strings in a field with instr(field, searchString, [position, [occurrence]]), similar to the function index of () for dataflow formulas.

### Build More Capable Data Prep Formulas with Expanded Column Name Support

Data Prep formulas now support a broader range of column names, giving you more options to choose names based on business needs rather than whether they work in a formula. Use column names that include dots, dashes, and Salesforce protected keywords such as MONTH and TITLE by surrounding them in double quotes. Previously, these column names couldn't be used in a formula. Also, you now use single quotes instead of double quotes around string literals, for example the word January in when "MONTH" = 'January'.

### Anticipate the Future with Time Series Forecasting (Generally Available)

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 and seasonality. For example, use forecasting to estimate quarterly sales. This feature, which is now generally available, includes some changes since the pilot release. You can now select the seasonality, auto detect the best model, and add a confidence interval.

### Find New Ways to Segment Your Data with Clustering (Generally Available)

Use the Cluster transformation in a Data Prep recipe to segment rows of data into distinct clusters based on common measure characteristics. For example, you can cluster accounts based on 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, apply different service handling or marketing campaigns based on cluster, or define different metrics and KPIs for analysis. This feature is now generally available.

### Analyze Aggregated Data from More Angles with Pivoting (Generally Available)

Use pivoting to group important metrics by dimensions in columns. For example, a dataset shows the total revenue generated in each country. To quickly compare each country's total revenue by account type (customers and partners), pivot the data by account type. This feature is now generally available.

### Run Recipes Faster with Input Caching

When you first run a recipe, Data Prep now caches the input data, storing a copy of the source data in cached files. To save time during subsequent recipe runs, Data Prep uses the cached data instead of extracting the same data again. To use input caching, the recipe must extract data from all fields in the source.

### **Preview Recipes Faster**

We added optimizations to make previews for recipes faster and less likely to result in an error. When you add an input source with more than 100 columns, the first 100 columns are automatically shown in preview by default. Previously, when you joined data, all hidden columns were shown by default. Now hidden columns remain hidden after the join. Column profiles are available only for columns shown in preview. To prevent a recipe from monopolizing resources in the multi-tenant environment, Data Prep now issues a warning if a recipe has more than 250 nodes or 50 join nodes. Recipes that exceed these recommendations can take longer to preview.

### Prepare for the New Version of Remote Connectors

To allow for future Tableau CRM remote connector enhancements, we're upgrading connector versions. New versions of connectors will work the same or better than before. Customers new to Tableau CRM after August 1, 2021 use only the new connector versions as they become available.

**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

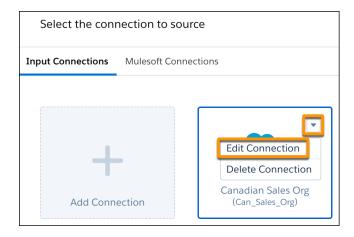
**How:** If you started using Tableau CRM before August 1, 2021, keep reading for your connector's upgrade path, and check back often for updates to the list of connectors and unique considerations.

Connections created with one of the following manually-upgraded connectors before the Summer '21 release continue to use the legacy version until you upgrade it. We recommend that you plan to upgrade and test the manually-upgraded connections soon, as we'll retire legacy connector versions beginning with the Winter '22 release.

- Amazon Redshift Connector (Note: the S3 Bucket Name setting is not used in the new version)
- Amazon S3 Connector (Note: the new connector version supports connecting to objects encrypted with customer master keys stored in the AWS Key Management Service or a customer-generated key in the 256-bit AES format.)
- AWS RDS Aurora MySQL Connector
- AWS RDS Aurora PostgresSQL Connector
- AWS RDS MariaDB Connector
- AWS RDS MySQL Connector
- AWS RDS PostgreSQL Connector
- AWS RDS SQL Server Connector
- Google BigQuery Legacy SQL Connector (Note: the new version doesn't yet support the staging environment, so throughput is reduced. The new version includes a property Storage API that defaults to False.)
- Google BigQuery Standard SQL Connector (Note: the new version doesn't yet support the staging environment, so throughput is reduced)
- Microsoft Azure SQL Database Connector
- Microsoft Synapse Analytics Connector (previously named Microsoft Azure SQL Data Warehouse Connector)
- NetSuite Connector (Note: the new version renders the list of objects differently than the legacy version. Update your recipes and dataflows with the new object names after upgrading.)
- Heroku Postgres Connector
- Salesforce External Connector

- Salesforce Marketing Cloud Contacts OAuth 2.0 Connector (Note: the new version makes more Marketing Cloud object data accessible. Only the business unit for which the package was published, and objects in the shared data extensions folder, are supported. The MID suffix naming format, objectName\_MID (for example *Ungrouped\_\_Complaint\_1464376*), is not yet supported. If you currently sync data from a child of the packaged business unit, or use the MID suffix naming format, do not upgrade at this time.)
- Snowflake Connector
- Zendesk Connector (Note: this connector is now generally available.)

To upgrade, turn off legacy mode, and complete the new version configuration. Select **Connect to Data** on the Connect tab of the Data Manager, then select the connection's menu, and click **Edit Connection**.



### Deselect Use legacy connector.



Save and validate the connector, and test your connection. When you create a connection from the manually-upgraded group, we recommend you use the new connector version to avoid the need to upgrade in the future.

Connections created with one of the following manually-migrated connectors before the Summer '21 release continue to use the legacy version until you manually migrate to the new version.

- Google Analytics Core Reporting v4 Connector (Note: the new version of this connector supports custom objects, and using core reporting API v4.0 provides additional Google Analytics options.)
- Marketo Connector (Note: there are two connector options "Marketo Connector" and "Marketo Legacy Connector," reflecting the new or legacy version. These connectors won't use the legacy connector toggle. The new connector version supports filtering on select objects.)
- Oracle Eloqua Connector (Note: the new version currently uses different field names, includes more objects than the legacy version, and doesn't yet support the Activity object)
- SAP HANA Connector (Note: there are two connector options "SAP HANA Cloud Connector" and "SAP HANA Connector," reflecting
  the new or legacy version. These connectors won't use the legacy connector toggle. The new connector version supports filtering,
  uses different connection properties, and is JDBC-based.)

To migrate, create a connection with the connector mirroring the settings of your legacy connection and any new required properties. Then, update your recipes and dataflows to use the external objects from the new connection. Keep the legacy version of the connection

for troubleshooting. We recommend that you complete the migration and test soon, as we'll retire legacy connector versions beginning with the Winter '22 release. When you create a connection from the manually-migrated group, it's always the new version.

#### SEE ALSO:

Salesforce Help: Connect and Sync Your Data to Tableau CRM (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: New Connector Version Availability, Upgrade Path, and Considerations (can be outdated or unavailable during release preview)

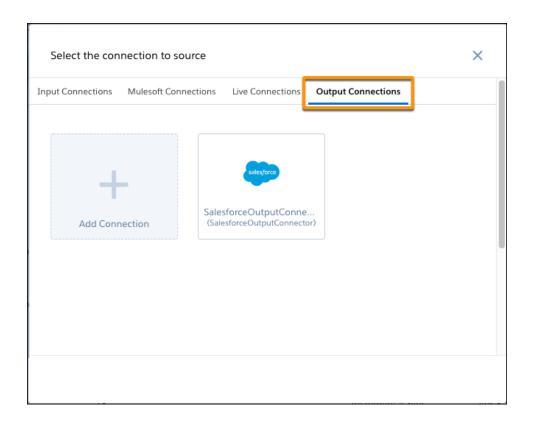
# Output Prepared Data from Tableau CRM into Salesforce with the Salesforce Output Connector (Generally Available)

Push your prepared Account, Opportunity, and custom object data into any Salesforce org from Tableau CRM with the Tableau CRM Salesforce Output connector and Data Prep. 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. 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. Up to 100 MB of data is written externally per run of a recipe per output connector, and up to 100 MB of data can be written per 24-hour period. This feature is now generally available.

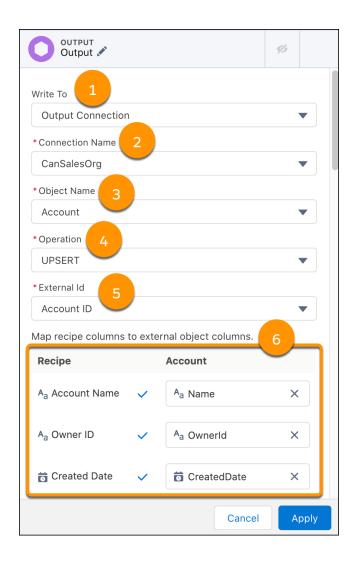
**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**Why:** 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 your Salesforce org's information. The credentials you use determine the connector's access level.



Build your recipe with Data Prep. In our example, lookup 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). If you UPSERT, select your remote object's unique identifier (5). Map recipe columns to their equivalent external object columns (6).



Save the recipe. When the recipe runs, Tableau CRM writes the output to the Salesforce org.

SEE ALSO:

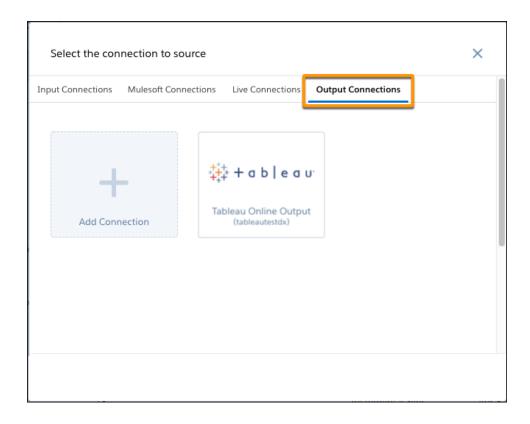
Salesforce Help: Salesforce Output Connection (can be outdated or unavailable during release preview)

### Export Your Tableau CRM Data to Tableau Online for Extra Analysis (Generally Available)

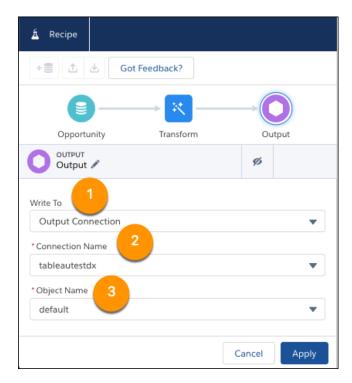
Push your prepared data from Tableau CRM into Tableau Online with the Tableau Online Output connector and Data Prep recipes. Your transformed, merged, and cleaned data is pushed to Tableau Online as a .hyper file for further analysis. For example, prepare historical Opportunity data for struggling products in Tableau CRM, and then use Tableau Online's tools to identify helpful trends to optimize deals. 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.

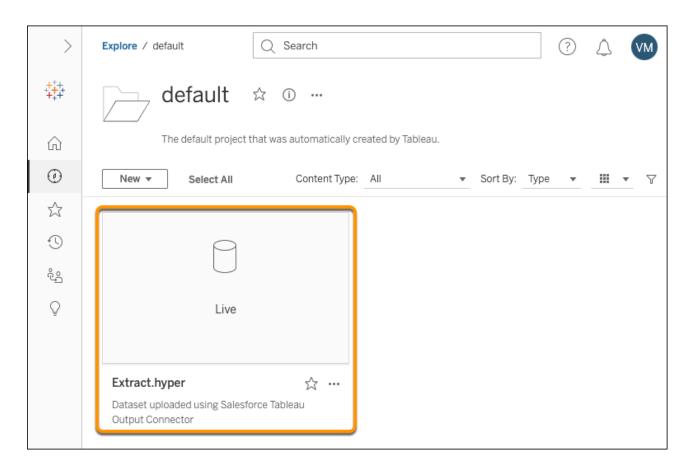
**How:** On the Connect tab of the Data Manager, click Connect to Data. Add a connection on the Output Connections tab and configure it with your Tableau Online account information.



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.



# Tableau CRM Output Connector Limits Were Changed

We pooled the limits per rolling 24-hour period for the Tableau CRM output connectors to Snowflake and Amazon S3. The limit for Snowflake Output or Sync Out and Amazon S3 Output connectors is a combined 50 GB, or 50 million rows. For example, if you push 40 GB of data from Tableau CRM to Snowflake, 10 GB of allotted data remains to push to Amazon S3.

**Where:** This change applies to Tableau CRM 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: Amazon S3 Output Connection (can be outdated or unavailable during release preview)
Salesforce Help: Snowflake Output Connection (can be outdated or unavailable during release preview)
Salesforce Help: Sync Out for Snowflake (can be outdated or unavailable during release preview)

# Microsoft Azure SQL Data Warehouse Connector is Now Called Microsoft Synapse Analytics Connector

Microsoft changed the name of its Azure SQL Data Warehouse product to Synapse, so we're renaming the connector. The connector works the same as it did before, and you don't need to make any changes.

SEE ALSO:

Microsoft Blog: Azure SQL Data Warehouse is now Azure Synapse Analytics

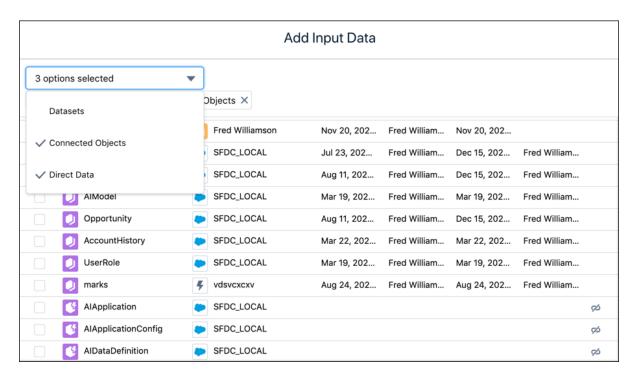
# Access Salesforce Data Without Data Sync Using Direct Data (Pilot)

Recipes can now access data in more Salesforce objects, not just the connected ones that you sync. When using direct data, the recipe pulls the latest data directly from the Salesforce object, bypassing the data sync step. Because direct data isn't optimized for performance like connected objects, use direct data only when data sync isn't available or when the Salesforce object is used as the source for one recipe only.

**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.

We provide Salesforce Data Direct 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. Salesforce Data Direct 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 Salesforce Direct Data in the Trailblazer Community.

How: When you add an input node to a recipe, you can now select direct data in addition to datasets and connected objects.



Each object in the Add Input Data page appears with an icon that denotes whether the object is a connected object (), dataset (), or direct data (). Salesforce objects that aren't connected appear as direct data.



Tip: To achieve faster runtimes, use connected objects instead of direct data when multiple recipes access the same Salesforce object or when a single recipe accesses multiple Salesforce objects. Recipes with connected objects run faster because data is synced in advance. They also run faster because multithreading is enabled for connected objects, where multiple, simultaneous Bulk API calls are made to process data in parallel. Unlike connected objects, direct data uses single threading, where Data Prep extracts data from one source object at a time. For example, if you have 4 recipes, each with 5 source objects, Data Prep pulls data from one object in one recipe while the other 19 source objects wait in the gueue.

# Schedule Recipe and Dataflow Runs after Other Runs Complete

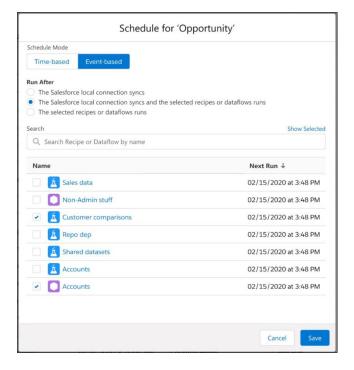
Manage recipe and dataflow runs based on your business and data needs with improved event-based scheduling that waits until other runs complete. Set your scheduled runs to kick off after the needed data refreshes, or only after a required previous run completes. Previously, you set event-based schedules to run only after the related local connection synced.

**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

When: This feature is being added on a rolling basis during the Summer '21 release.

**Why:** Enhanced event-based scheduling helps you control the priority and order of recipe and dataflow runs. For example, you have recipes that prepare data from external shipping vendor data sources and a Shipping Overview recipe that draws from those vendor datasets and Salesforce. With enhanced event-based scheduling, set your Shipping Overview recipe to run after its local data sync and the recipes for each shipping vendor complete.

**How:** When you schedule a recipe or dataflow, select to run after another recipe or dataflow.



Choose up to five recipes and dataflows that complete before this run can begin.

#### SEE ALSO:

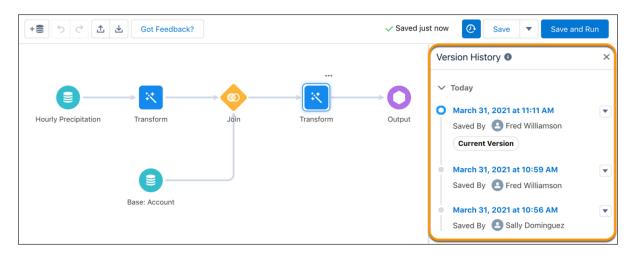
Salesforce Help: Schedule a Recipe to Run Automatically (can be outdated or unavailable during release preview)
Salesforce Help: Schedule a Dataflow to Run Automatically (can be outdated or unavailable during release preview)

## Restore Recipes with Version History

Don't be afraid to test new ideas on recipes. If you break it, you can now revert to a previous version. For those complex recipes, collaborate with others and build it iteratively. With version history, you can see which contributor updated each version along the way.

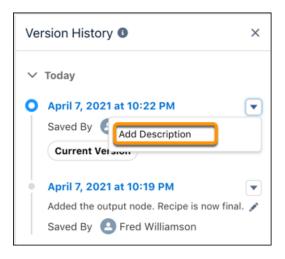
**Where:** This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Each time you save a recipe, a version is created. To view a recipe's version history, click the Version History button ( ...).



To view a previous version, click the date of the version. To make sure you don't lose changes to a version, save the changes before switching to another version. Saving changes to an old version makes it the current version.

To add a description to a version, click the down arrow ( ) next to the version date and click **Add Description**.



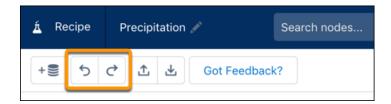
Data Prep can store up to 20 versions for each recipe—10 with descriptions and 10 without. The latest versions are always kept. For example, if there are 10 versions with descriptions and another version with a description is added, the oldest one with a description is deleted.

## Undo Changes to a Recipe

Use undo to revert unwanted changes to a recipe. For example, if you make 10 updates to a recipe and then accidentally delete the wrong node, you can undo the node deletion. Or you can keep undoing all actions until you undo all the changes to this version of the recipe. You can undo all actions since the last save. Use redo to restore a recipe state that was undone. Previously, you had to manually undo the changes.

**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 undo or redo an action, click the Undo or Redo button.



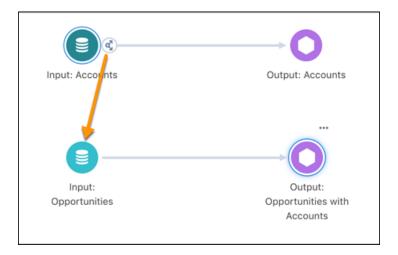
You can also use the keyboard shortcuts Ctrl+Z (Windows) and Cmd+Z (MacOS) for undo, and Ctrl+Y (Windows) and Cmd+Y (MacOS) for redo.

# Connect, Join, and Append Data with Enhanced Graph Interactions

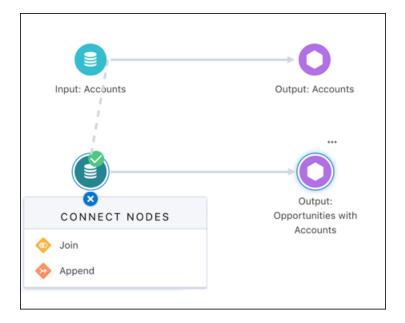
You can now join or append data from any node to any other node in the recipe, upstream or downstream. Previously, you could join or append only the end node to a downstream node, and duplicated a node each time you wanted to use it again in the recipe. You can now create a branch at an intermediate node, and join or append it to another path in the recipe. Also, you can now move nodes so that they flow right to 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.

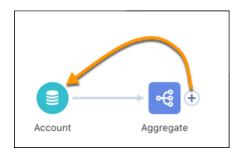
**How:** To create a branch and join or append it to another path, hover over a node to see the Branch button ( ), and drag the Branch button on top of a node in the other path.



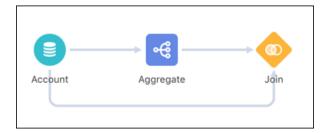
In the Connect Nodes box, select whether to join or append the data.



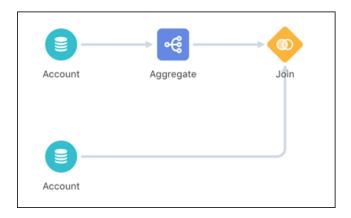
To join or append data to a predecessor node, drag the Add Node button ( + ) for a node or a Branch button on top of the predecessor.



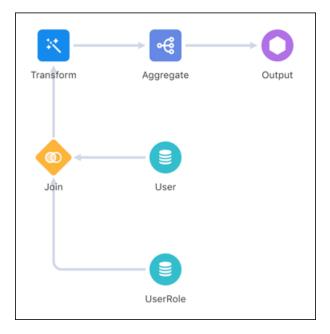
Then select whether to join or append the data in the Connect Nodes box. This graph joins aggregated account data back to the account records.



Previously, to create this join, you added two instances of the same Account input node.



If it makes the flow of data easier to view, you can now position nodes behind previous nodes in the graph. In this graph, notice that the User and UserRole input nodes are to the right of the subsequent Join node. Previously, input nodes always started on the left of the graph and all subsequent nodes flowed to the right.



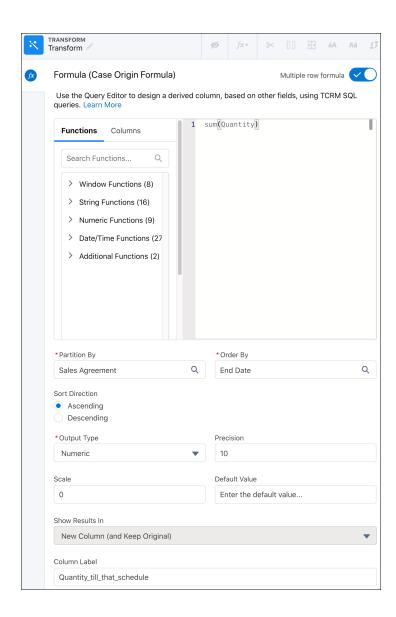
# Enhance Data Prep Calculated Formulas with New Functions

Build derived fields that offer more windowing and data cleanup options with three new Data Prep formula functions. Calculate the cumulative sum of a window of related rows with sum(expr). Return the number of characters in a string with char\_length(field). And find the location of strings in a field with instr(field, searchString, [position, [occurrence]]), similar to the function index of() for dataflow formulas.

**Where:** This change applies to Tableau CRM 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 create a custom formula with window functions, add a Custom Formula transformation to a Transform node in a Data Prep recipe.

For example, track the cumulative number of monthly units shipped tied to a specific sales agreement with the <code>sum(expr)</code> function. Enable Multiple row formula to use this window function. Enter the custom formula <code>sum(Quantity)</code>, define the window properties to partition by **Sales Agreement**, and order by **End Date**.



When you run the recipe, the formula generates the Quantity\_till\_that\_schedule column by progressively adding all the values from the Quantity column over time for each Sales Agreement.



#### SEE ALSO:

Salesforce Help: Formula Transformation: Create a Calculated Column Based on an Expression (can be outdated or unavailable during release preview)

# Build More Capable Data Prep Formulas with Expanded Column Name Support

Data Prep formulas now support a broader range of column names, giving you more options to choose names based on business needs rather than whether they work in a formula. Use column names that include dots, dashes, and Salesforce protected keywords such as MONTH and TITLE by surrounding them in double quotes. Previously, these column names couldn't be used in a formula. Also, you now use single quotes instead of double quotes around string literals, for example the word January in when "MONTH" = 'January'.

**Where:** This change applies to Tableau CRM 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 select columns with the formula builder, those with a dash, dot, or keyword are automatically quoted for you. When you manually type a formula in Data Prep, surround column names that include dots, dashes, and Salesforce protected keywords in double quotes. For example, to combine columns with protected keywords for first and last name, use the concat function and surround the column names in double quotes concat ("FirstName", '-', "LastName").



Tip: To avoid manually evaluating each column name for a dash, dot, or keyword, the best practice is to use double quotes around all column names.

Data Prep automatically updates your existing formulas with double quotes around string literals to use single quotes.

#### SEE ALSO:

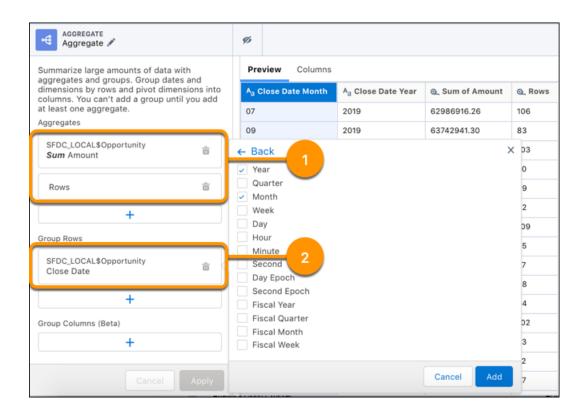
Salesforce Help: Formula Transformation: Create a Calculated Column Based on an Expression (can be outdated or unavailable during release preview)

### Anticipate the Future with Time Series Forecasting (Generally Available)

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 and seasonality. For example, use forecasting to estimate quarterly sales. This feature, which is now generally available, includes some changes since the pilot release. You can now select the seasonality, auto detect the best model, and add a confidence interval.

**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:** 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 12 months, add both measures as aggregates (1), and group rows by year and month in the Close Date column (2) in the Aggregate node.



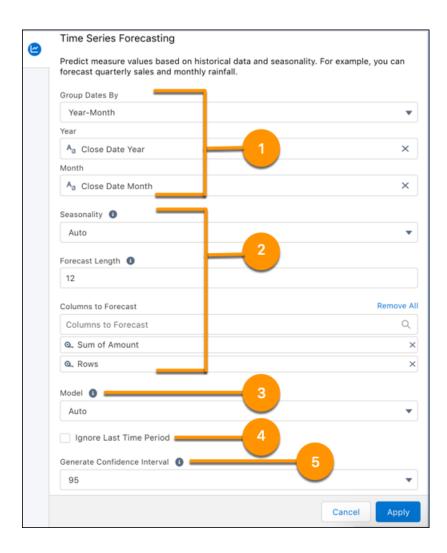
To add a Time Series Forecasting transformation to a Transform node, click the Time Series Forecast button ( ) in the Transform toolbar. Choose the time interval of the time series data, such as year-month (1). If applicable, select the seasonality, forecast length, and the measure columns that you want to forecast (2).

Then select the forecast model to use in the Model field (3).

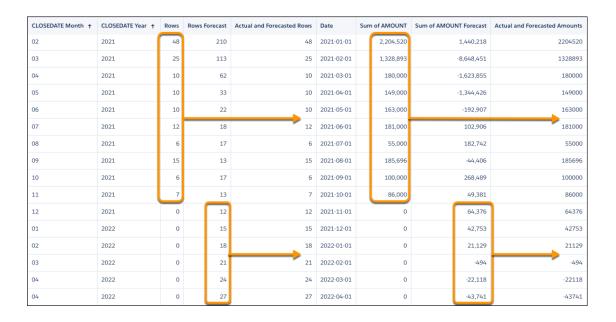
- Additive uses the Holt-Winters Additive method. Use this method when the seasonal variations are roughly constant throughout the series.
- Multiplicative uses the Holt-Winters Multiplicative method. Use this method when the seasonal variations change proportionally to the average (level of the series).
- Auto uses the method with the best forecast accuracy.

If the data in the last period is incomplete, meaning that the period isn't over yet, select **Ignore Last Time Period** (4). If you use incomplete data, the forecast can be misleading.

To account for errors in forecasts, select an 80% or a 95% confidence interval (5). A confidence interval provides a range of values for each forecast based on a certain level of confidence.



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.





**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.

#### SEE ALSO:

Salesforce Help: Time Series Forecasting Transformation: Forecast Measures (can be outdated or unavailable during release preview)

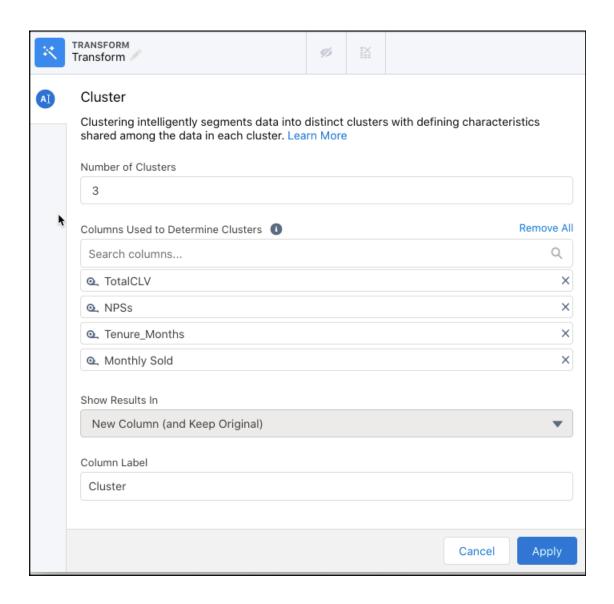
# Find New Ways to Segment Your Data with Clustering (Generally Available)

Use the Cluster transformation in a Data Prep recipe to segment rows of data into distinct clusters based on common measure characteristics. For example, you can cluster accounts based on 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, apply different service handling or marketing campaigns based on cluster, or define different metrics and KPIs for analysis. 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.

**How:** To add a Cluster transformation to a Transform node in a Data Prep recipe, click the Cluster button ( ) in the Transform toolbar. Enter the number of clusters and the measure columns used to determine clusters. For example, to segment accounts, you can create

three clusters based on the account customer lifetime value (CLV), net promoter score (NPS), tenure, and monthly sold.



When you click Apply, preview shows sample cluster values that you can use when building other recipe transformations. These values are just samples—they can change after the recipe runs.

Preview Columns								
A <sub>a</sub> Key	Q., Tenure_Months	Q., TotalCLV	Q., Monthly Sold	@, Churn_Probability	ور NPSs	<u>യ</u> , Monthly_Charge	A <sub>a</sub> Cluster <b>(</b>	
RB	28.00	364.00	61979.00	0.17	9.20	13.00	Cluster 1	
RB	40.00	520.00	83729.00	0.88	9.20	13.00	Cluster 2	
RB	41.00	492.00	99727.00	3.39	9.20	12.00	Cluster 3	
RB	13.00	156.00	7497.00	0.02	7.30	12.00	Cluster 2	
RB	46.00	598.00	540668.00	0.48	9.20	13.00	Cluster 2	
RB	10.00	160.00	4656.00	0.12	7.30	16.00	Cluster 1	
RB	45.00	765.00	376352.00	1.80	9.20	17.00	Cluster 3	
RB	8.00	136.00	6468.00	4.66	7.30	17.00	Cluster 1	
RB	33.00	528.00	11571.00	74.14	9.20	16.00	Cluster 1	
RB	15.00	390.00	91097.00	99.60	3.90	26.00	Cluster 3	
RB	43.00	430.00	71460.00	0.06	7.30	10.00	Cluster 1	
RB	1.00	17.00	6065.00	0.48	3.90	17.00	Cluster 3	
RB	23.00	414.00	62712.00	0.45	9.20	18.00	Cluster 2	
RB	10.00	170.00	3667.00	10.49	7.30	17.00	Cluster 3	
RB	38.00	1026.00	504197.00	99.14	3.90	27.00	Cluster 2	
RB	5.00	125.00	5656.00	99.98	3.90	25.00	Cluster 3	

When you run the recipe, each account is assigned a cluster. The clustering algorithm determines clusters by comparing the values for all selected columns. For example, if the lifetime value and net promoter score don't fall into the same ranges determined by the algorithm, accounts with the same tenure and monthly sold can be placed in different clusters.

You can then build a dashboard to gain insights about accounts in each cluster.



SEE ALSO:

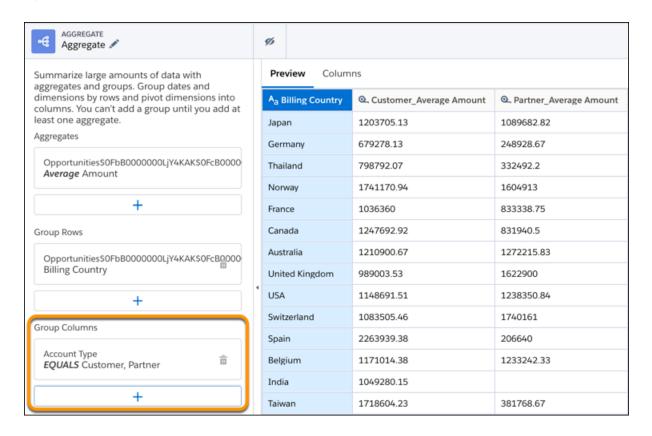
Salesforce Help: Cluster Transformation: Segment Your Data (can be outdated or unavailable during release preview)

# Analyze Aggregated Data from More Angles with Pivoting (Generally Available)

Use pivoting to group important metrics by dimensions in columns. For example, a dataset shows the total revenue generated in each country. To quickly compare each country's total revenue by account type (customers and partners), pivot the data by account type. 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.

**How:** Use the Aggregation node in a Data Prep recipe to pivot dimensions as columns. For example, you aggregated the average opportunity amount by country and now want to break up the average amount by account type. To segment the average amount by account type, add the Account Type in the Group Columns 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 field.
- Pivoting increases the number of columns, so 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.

#### SEE ALSO:

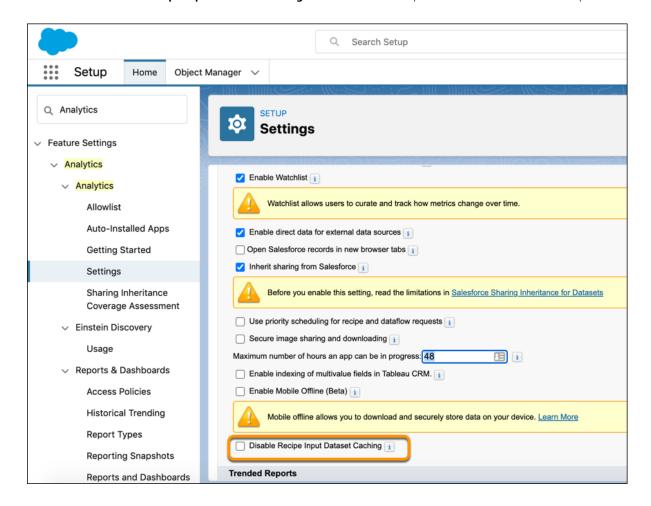
Salesforce Help: Aggregate Node: Roll Up Data to a Higher Level (can be outdated or unavailable during release preview)

# Run Recipes Faster with Input Caching

When you first run a recipe, Data Prep now caches the input data, storing a copy of the source data in cached files. To save time during subsequent recipe runs, Data Prep uses the cached data instead of extracting the same data again. To use input caching, the recipe must extract data from all fields in the source.

**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:** Input caching is enabled by default. To disable input caching, from Setup, in the Quick Find box, enter <code>Analytics</code>, click **Settings**, and then select **Disable Recipe Input Dataset Caching**. You can disable this option to have more consistent recipe runtimes.



When the option is enabled, recipe runtime varies based on whether the source data is cached and the cache is used. If the recipe doesn't extract data from all fields in the source, caching doesn't happen. If the data is older than 45 days, the disk usage exceeds 70%, or the source data changed since the last recipe run, cached data isn't used.

# **Preview Recipes Faster**

We added optimizations to make previews for recipes faster and less likely to result in an error. When you add an input source with more than 100 columns, the first 100 columns are automatically shown in preview by default. Previously, when you joined data, all hidden columns were shown by default. Now hidden columns remain hidden after the join. Column profiles are available only for columns shown in preview. To prevent a recipe from monopolizing resources in the multi-tenant environment, Data Prep now issues a warning if a recipe has more than 250 nodes or 50 join nodes. Recipes that exceed these recommendations can take longer to preview.

**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.

# Analytics Prebuilt Templates and Apps

The Tableau CRM prebuilt templates and apps include new apps and dashboards that help you get better value from your data. Gain insights into your communications sales operations and allow customer service reps to optimize the customer experience with the new Analytics for Communications - Business and Consumer apps. Updates to the Revenue Operations Analytics app provide more granularity, control, and details to help you to make better sales decisions.

#### IN THIS SECTION:

#### Get Insights About Your Communications Cloud with Analytics for Communications - Business

It can be difficult to stay on top of the details of your communications sales processes. The new Analytics for Communications-Business app brings insights to these processes with a comprehensive dashboard with details about opportunities, quotes, and orders. The app includes targeted Quote and Account Insights dashboards that you can embed anywhere. Finally, the new app includes recipes.

#### Enhance Your Customer Experience with Analytics for Communications - Consumer

The Analytics for Communications - Consumer app gives your customer service reps instant insights into accounts and subscriptions to help them gauge customer sentiment, anticipate customer needs, and provide the right solutions. Insights are available for key metrics such as Customer Lifetime Value, Tenure, Customer Interactions, Data Usage, Average Handling Time, and Payment Frequency.

#### Stay on Top of Your Sales Goals in the Updated Revenue Operations Analytics

Better understand your sales opportunities and how close you are to meeting your goals with the updated Revenue Operations Analytics app. Surface your sales gaps with the gap-to-goal metric, and learn more about your key metrics when you hover over them. Also, the details tables can show you how your sales landscape changed since your dataset was last updated.

#### Reveal Hidden Insights with Increased Granularity and Control in Revenue Operations Analytics

Love the Revenue Operations Sales Forecast dashboard but want to learn more about your products? To better understand which product sales were successful and where there's room for growth, we added the product dataset to the Revenue Operations Sales Forecast dashboard. You can also use a custom field as your opportunity amount so your forecasts reflect your best sales opportunities. Previously, we selected the opportunity amount field for you. Including the new dataset allows you to analyze product sales with more granularity, and it allows you to perform a whitespace. analysis. Whitespace is a gap in existing sales that can provide opportunities to cross sell or upsell.

#### Improve Your Win Rates from Anywhere with the Revenue Operations Sales Manager Embedded Dashboard

As a sales manager, you want to see your gap-to-goal, your open opportunities, and the predicted sales for the quarter at-a-glance. Check out the new Revenue Operations Sales Manager Embedded Dashboard to see all your relevant stats in one place. Then, embed it where it's most convenient for you. In previous releases, you accessed the dashboard via Analytics Studio and checked a few different places to find your critical information.

#### SEE ALSO:

Customize Your Analytics for Insurance App Data

Increase Your Rebate-Driven Sales with Einstein Discovery for Rebate Management (Beta)

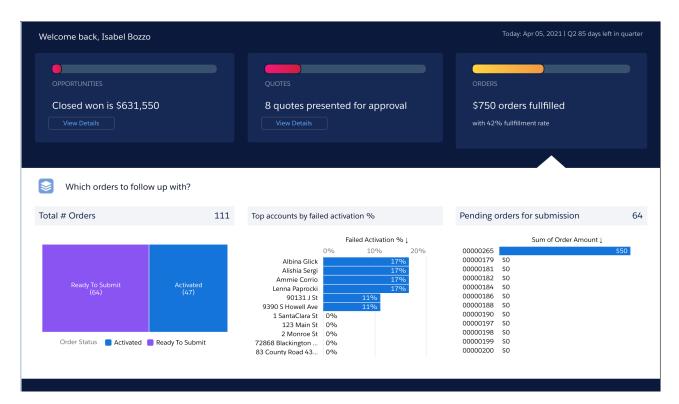
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It can be difficult to stay on top of the details of your communications sales processes. The new Analytics for Communications-Business app brings insights to these processes with a comprehensive dashboard with details about opportunities, quotes, and orders. The app includes targeted Quote and Account Insights dashboards that you can embed anywhere. Finally, the new app includes recipes.

**Where:** This change applies to Tableau CRM 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 Tableau CRM for Communications app is only for Communications Cloud users. To create an Analytics for Communications - Business app, you must also have the Tableau CRM for Communications license. Note that this app uses recipes, and recipes are only supported in orgs with Data Sync on; therefore, this app is for use in orgs with Data Sync on.

**How:** In Tableau CRM Analytics Studio, click **Create**, and select **App**. Find and select **Analytics for Communications - Business**, and then follow the instructions in the wizard to create your app.



(1) Important: The Analytics for Communications-Business app is currently supported for orgs with Data Sync on.

# Enhance Your Customer Experience with Analytics for Communications - Consumer

The Analytics for Communications - Consumer app gives your customer service reps instant insights into accounts and subscriptions to help them gauge customer sentiment, anticipate customer needs, and provide the right solutions. Insights are available for key metrics such as Customer Lifetime Value, Tenure, Customer Interactions, Data Usage, Average Handling Time, and Payment Frequency.

**Where:** This feature is available in Tableau CRM 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 Tableau CRM for Communications app is only for Communications Cloud users. To create an app from the Analytics for Communications - Consumer template, you must also have the Tableau CRM for Communications license.

Note: This app uses a recipe instead of a dataflow, and recipes are only supported in orgs with Data Sync on. The Analytics for Communications-Consumer app is only supported in orgs with Data Sync on.

**How:** In Tableau CRM Analytics Studio, click **Create**, and select **App**. Select **Analytics for Communications - Consumer**, and then follow the instructions in the wizard to create your app.



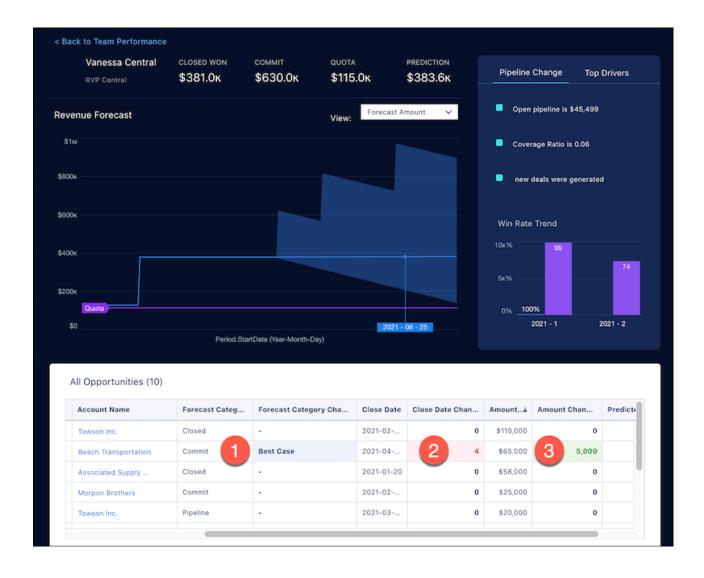
# Stay on Top of Your Sales Goals in the Updated Revenue Operations Analytics

Better understand your sales opportunities and how close you are to meeting your goals with the updated Revenue Operations Analytics app. Surface your sales gaps with the gap-to-goal metric, and learn more about your key metrics when you hover over them. Also, the details tables can show you how your sales landscape changed since your dataset was last updated.

**Where:** This change applies to Tableau CRM 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. If you have an existing Revenue Operations Analytics app, upgrade it to view the new functionality. To upgrade your app, click the **New version available** link in the app's home page, and then follow the wizard's instructions. Upgrading an app removes any customizations.

When you open the dashboard, a new metric, the gap-to-goal, tells you the gap between your current sales and the targeted sales. In the details table, changes since the last dataset update to deal amount, closed dates, and forecast category are highlighted. This metric can help you understand if any relevant changes occurred since you last updated the dataset. To see more details about the closed won numbers and committed and predicted win amounts, you can hover over these values. For example, you can see the top closed wins, the top committed sales, and upper and lower bounds of the predicted win rates.



Section	Description
1.) Forecast Category Change	Changes to the forecast category. For example, the category for this opportunity is changed to Best Case.
2.) Close Date Change	Changes to the close date.
3.) Amount Change	Changes to the win amount.

# Reveal Hidden Insights with Increased Granularity and Control in Revenue Operations Analytics

Love the Revenue Operations Sales Forecast dashboard but want to learn more about your products? To better understand which product sales were successful and where there's room for growth, we added the product dataset to the Revenue Operations Sales Forecast dashboard. You can also use a custom field as your opportunity amount so your forecasts reflect your best sales opportunities. Previously, we selected the opportunity amount field for you. Including the new dataset allows you to analyze product sales with more granularity, and it allows you to perform a whitespace. analysis. Whitespace is a gap in existing sales that can provide opportunities to cross sell or upsell.

**Where:** This change applies to Tableau CRM 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. If you have an existing Revenue Operations Analytics app, upgrade it to view the new functionality. To upgrade your app, click the **New Version Available** link in the app's home page, and then follow the wizard's instructions. Upgrading an app removes any customizations.

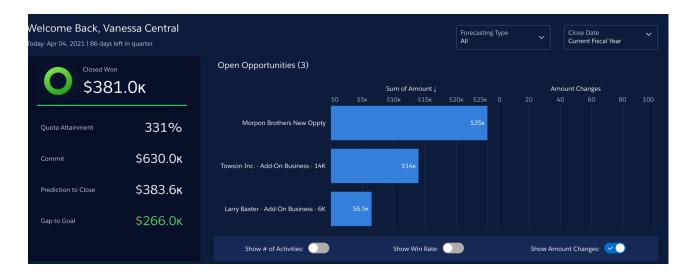
# Improve Your Win Rates from Anywhere with the Revenue Operations Sales Manager Embedded Dashboard

As a sales manager, you want to see your gap-to-goal, your open opportunities, and the predicted sales for the quarter at-a-glance. Check out the new Revenue Operations Sales Manager Embedded Dashboard to see all your relevant stats in one place. Then, embed it where it's most convenient for you. In previous releases, you accessed the dashboard via Analytics Studio and checked a few different places to find your critical information.

**Where:** This change applies to Tableau CRM 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:** Embed the new Sales Manager dashboard in any Salesforce experience to view charts and data on your sales team's opportunities. For instructions on embedding a dashboard, see Embed Tableau CRM Dashboards in Lightning Pages in Salesforce Help.

If you have an existing Revenue Operations Analytics app, upgrade it to view the new functionality. To upgrade your app, click the **New Version Available** link in the app's home page, and then follow the wizard's instructions. Upgrading an app removes any customizations.



# **Analytics App Building**

Build dashboards faster by copying and pasting widgets across dashboards, add style to your dashboards with enhanced text formatting, and skip the developer tools when you create app templates in Analytics Studio.

#### IN THIS SECTION:

#### Supercharge Productivity When You Copy and Paste Widgets Across Dashboards

Now it's a whole lot easier to create and maintain your dashboards. You can copy widgets such as text and charts, then paste them in another dashboard and still keep the original widget arrangement, styling, and queries. If you're familiar with duplicating widgets in the same dashboard, that hasn't changed.

#### Add Richness to Your Dashboard Insights with Enhanced Text Formatting

Show your style! Apply custom colors, italic, bold, sizing, and more to your dashboard text. It's a great way to emphasize important data, make your dashboards more scannable, and tell a more compelling data story.

#### Create and Manage Templates Directly in Tableau CRM Analytics Studio

Want to create app templates with a couple of clicks? Now admin users can create and manage app templates directly from the Analytics Studio. Previously, developers used the SFDX CLI or Workbench to create, update, and delete templates from apps.

#### Use SQL with Tableau CRM Direct Data (Generally Available)

To extend analysis on your Snowflake data and uncover more insights, you can now run Structured Query Language (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. This feature, now generally available, includes support for link widgets, receiving faceting in an SQL step, and adding multiple datasets to an SQL query.

#### Try Out Custom Time Zones Without the Big Commitment (Beta)

We made it easier to change time zones in your data. With Single Custom Time Zone, now you can switch to a custom time zone and back to GMT. As you build dashboards that include the custom time zone, you see datasets that use only the custom time zone, too.

#### Get More Column Options and Windowing Functions for Blended Data

Focusing on the right information involving multiple datasets just got easier. You can add column filters and apply Boolean logic to data-blended queries. To save time as you analyze blended data, clone the columns that work for you and modify them. Also, windowing functions are now available for blended data so you can calculate business ratios, such as moving average for sales, using data from different datasets.

#### Navigate and Explore Direct Data in Compare Tables

Tableau CRM Direct Data for Snowflake now lets you view and manipulate Snowflake data in compare table mode. Easily scroll across columns, create calculated columns, and apply column filters and filter logic to surface business insights from data residing in Snowflake.

#### Find Dashboards and Datasets by Field Using Semantic Search

Uncover Tableau CRM assets beyond just those matching exact keywords. Semantic search boosts searching with a behind-the-scenes view of object fields and dataset columns across all your org's data. You can ask to see dashboards using specific sObject or dataset fields, or ask for datasets containing specific sObject fields. Semantic search inspects all your data, but the search results are tailored for you, adhering to user access, sharing rules, and row-level security.

### What's New In SQL and SAQL

Filter grouped results and search for patterns in strings with SQL's HAVING and LIKE functions, multivalue fields are now opt-in, and null dimensions are no longer ignored in SAQL.

#### Do More with Null Values in Dimensions and Dates (Beta)

It's now easier to work with null value records in your datasets. When a record's dimension or date field is left blank, it appears as a hyphen in explorer and dashboard designer charts and tables. Previously, to include a null value in your dataset, you assigned it a default value, such as an asterisk.

#### Use Dashboards with Improved Accessibility

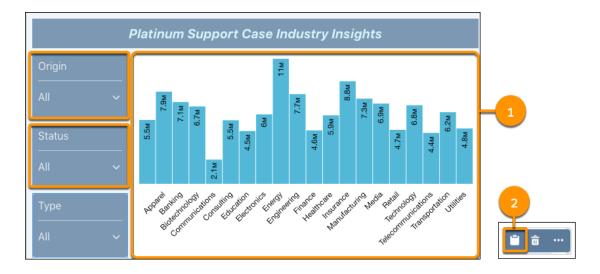
Navigate and interact with dashboards with improved accessibility such as assistive text, keyboard controls, and color contrast. For example, manage saved views, interact with buttons and alerts, and use widget tooltips more easily.

# Supercharge Productivity When You Copy and Paste Widgets Across Dashboards

Now it's a whole lot easier to create and maintain your dashboards. You can copy widgets such as text and charts, then paste them in another dashboard and still keep the original widget arrangement, styling, and queries. If you're familiar with duplicating widgets in the same dashboard, that hasn't changed.

**Where:** This change applies to Tableau CRM 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 copy and paste widgets from one dashboard to another, first select widgets. You can copy and paste one or more widgets. To select multiple widgets, use Ctrl or Cmd (1). To copy widgets, use Ctrl+c, Cmd+c, or click the copy icon (2).



Paste widgets in the same dashboard or a separate one. To paste, use Ctrl+v or Cmd+v, or click the paste icon (3). Pasted widgets keep their original layout, styling, and underlying queries. When you paste widgets in a dashboard with existing widgets, pasted widgets are placed in available space on the dashboard.



SEE ALSO:

Salesforce Help: Copy and Paste Widgets Across Dashboards (can be outdated or unavailable during release preview)

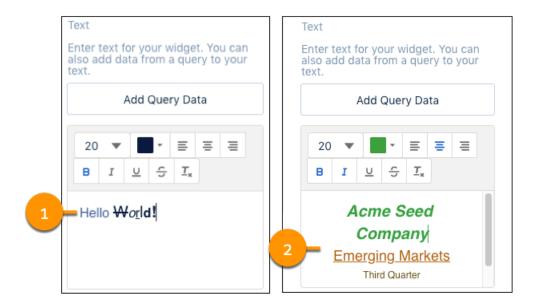
# Add Richness to Your Dashboard Insights with Enhanced Text Formatting

Show your style! Apply custom colors, italic, bold, sizing, and more to your dashboard text. It's a great way to emphasize important data, make your dashboards more scannable, and tell a more compelling data story.

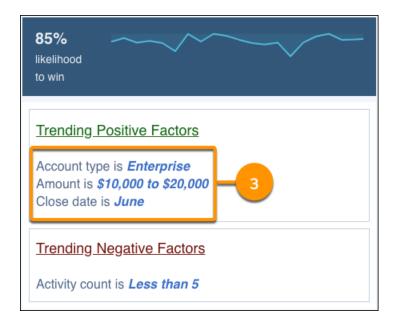
**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Text helps users understand the data in your dashboard. With enhanced formatting in text widgets, you have more ways to make text match the message in your data. Adjust character size, and apply bold, italic, underline, and strikethrough formatting to words and

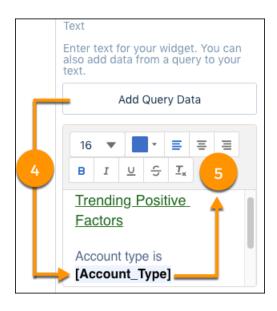
individual characters (1). Use standard colors, or get creative and customize. For example, match Acme Seed Company branding using custom colors (2).



Emphasize what's important, including query-based text. For example, format dynamic text that changes depending on values in your data, such as account types, revenue ranges, and close dates (3).



To format text that's based on query data, first select and add the query field. For example, add an <code>[Account\_Type]</code> field (4). Then, highlight and format the text (5).



#### SEE ALSO:

Salesforce Help: Enrich Your Data with Dashboard Text (can be outdated or unavailable during release preview)

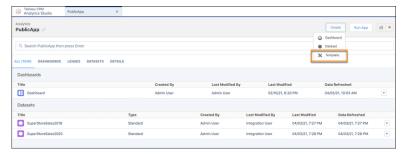
Salesforce Help: Automatically Highlight Data with Conditional Formatting (can be outdated or unavailable during release preview)

# Create and Manage Templates Directly in Tableau CRM Analytics Studio

Want to create app templates with a couple of clicks? Now admin users can create and manage app templates directly from the Analytics Studio. Previously, developers used the SFDX CLI or Workbench to create, update, and delete templates from apps.

**Where:** This change applies to Tableau CRM 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:** Create the Tableau CRM app, containing assets such as dashboards, lenses, datasets, and dataflows. When you're ready to templatize your app, in Tableau CRM Analytics Studio, open the app, click **Create**, and select **Template**.



The Tableau CRM framework creates a basic template from your app that can be customized and then distributed to other orgs, similar to Tableau CRM Prebuilt Apps. On the Analytics Studio home page, click **All Items**, and use the Templates tab to update your template,

decouple your template from the source app, and delete templates. Customization of your template is necessary to add wizard questions and run-time rules.

#### SEE ALSO:

Salesforce Help: Distribute Your Tableau CRM Apps with Tableau CRM Templates (can be outdated or unavailable during release preview)

Salesforce Help: Deploy Tableau CRM Prebuilt Apps (can be outdated or unavailable during release preview)

# Use SQL with Tableau CRM Direct Data (Generally Available)

To extend analysis on your Snowflake data and uncover more insights, you can now run Structured Query Language (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. This feature, now generally available, includes support for link widgets, receiving faceting in an SQL step, and adding multiple datasets to an SQL query.

**Where:** This change applies to Tableau CRM 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 enable SQL for Tableau CRM Direct Data, from Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. In the SQL Settings section, select **Enable SQL for live datasets**, then save your changes.

To create SQL queries for a live dataset, in Tableau CRM Analytics Studio, open the dataset, and click Query Mode (1). To include another dataset in the query, add it (2). Edit the SQL query and click Run Query to validate it (3). To add the query to a dashboard, clip the query lens to the dashboard (4).



# Try Out Custom Time Zones Without the Big Commitment (Beta)

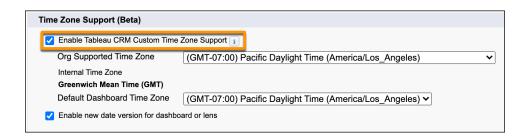
We made it easier to change time zones in your data. With Single Custom Time Zone, now you can switch to a custom time zone and back to GMT. As you build dashboards that include the custom time zone, you see datasets that use only the custom time zone, too.

**Where:** This change applies to Tableau CRM 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, Single Custom Time Zone is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Single Custom Time Zone in the Trailblazer Community.

**How:** Disable Single Custom Time Zone (beta) in Analytics Setup.



(1) Important: Manually run data sync for all connections, recipes, and dataflows to return data to GMT.

SEE ALSO:

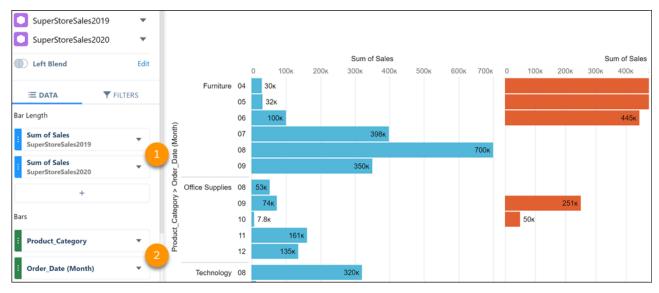
Salesforce Help: Handle Custom Time Zone Values (Beta) (can be outdated or unavailable during release preview)
Salesforce Help: Enable Single Custom Time Zone Support (Beta) (can be outdated or unavailable during release preview)

# Get More Column Options and Windowing Functions for Blended Data

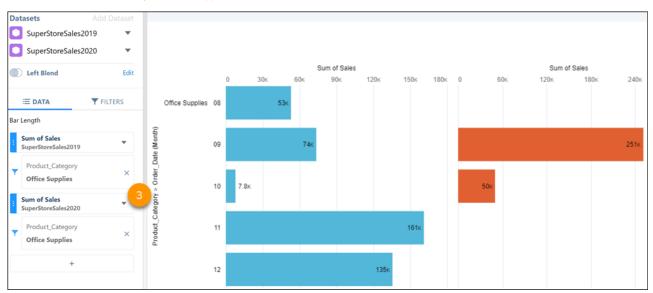
Focusing on the right information involving multiple datasets just got easier. You can add column filters and apply Boolean logic to data-blended queries. To save time as you analyze blended data, clone the columns that work for you and modify them. Also, windowing functions are now available for blended data so you can calculate business ratios, such as moving average for sales, using data from different datasets.

**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

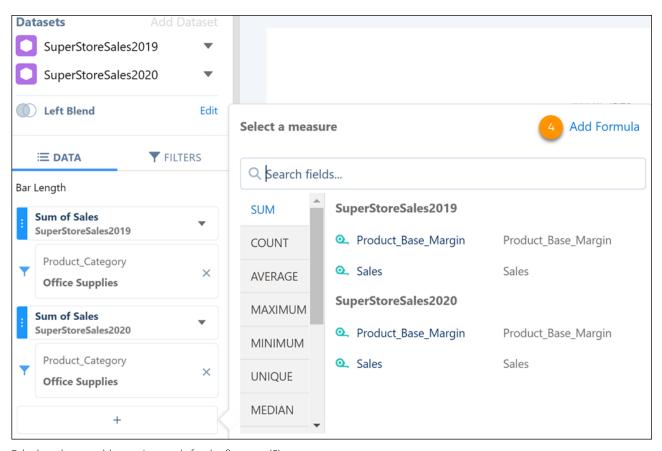
**How:** Imagine that you want to compare monthly running totals for office supplies sales for two consecutive years. In a lens that includes the sales data for both years, add Sum of Sales for each year (1). Then, group the data by product category and order date (2).



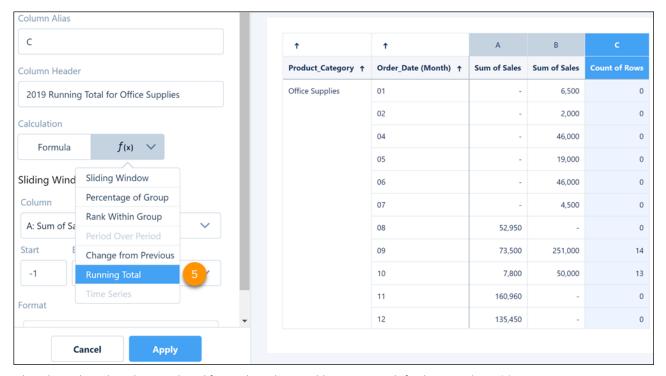
Add a filter to show sales for just office supplies (3).



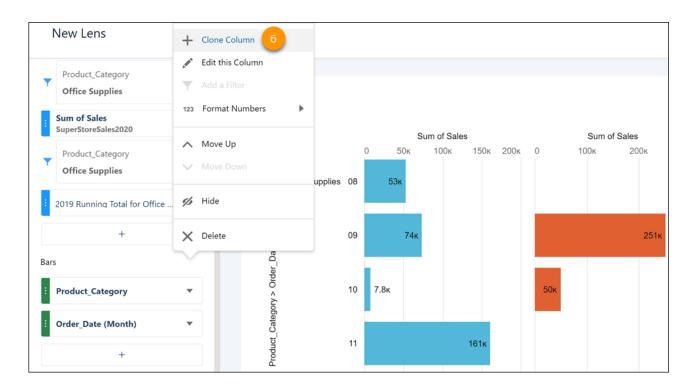
On a new column, click **Add Formula** (4).



Calculate the monthly running totals for the first year (5).



When done, clone the column and modify it to show the monthly running totals for the second year (6).



# Navigate and Explore Direct Data in Compare Tables

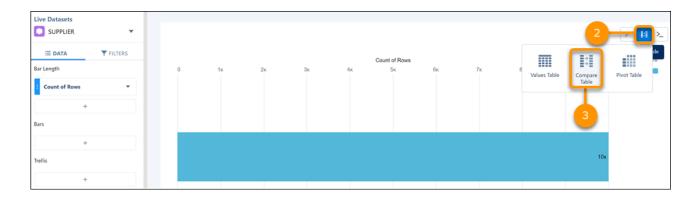
Tableau CRM Direct Data for Snowflake now lets you view and manipulate Snowflake data in compare table mode. Easily scroll across columns, create calculated columns, and apply column filters and filter logic to surface business insights from data residing in Snowflake.

**Where:** This change applies to Tableau CRM 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 explore Snowflake data in the compare table mode, open a live dataset associated with a Snowflake object in Tableau CRM Studio (1).



In the explorer lens, click the Table Mode icon (2). Select **Compare Table** (3).



#### SEE ALSO:

Salesforce Help: Navigate Compare Table Columns (can be outdated or unavailable during release preview)

Salesforce Help: Window Functions Available in the Compare Table (can be outdated or unavailable during release preview)

## Find Dashboards and Datasets by Field Using Semantic Search

Uncover Tableau CRM assets beyond just those matching exact keywords. Semantic search boosts searching with a behind-the-scenes view of object fields and dataset columns across all your org's data. You can ask to see dashboards using specific sObject or dataset fields, or ask for datasets containing specific sObject fields. Semantic search inspects all your data, but the search results are tailored for you, adhering to user access, sharing rules, and row-level security.

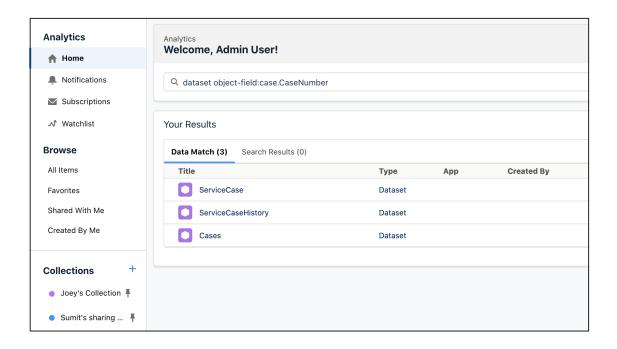
**Where:** This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** To initiate semantic search, use this syntax in the home page search bar:

targetAssetType sourceAssetType:fieldName1,fieldName2

The targetAssetType can be dashboard or dataset. The sourceAssetType can be object-field or dataset-field. The fieldName must be the developerName of the field. For example:

- To list dashboards using the activity. Activity Name sObject field, enter dashboard object-field: activity. Activity Name
- To list dashboards using the Opportunity. Amount dataset field, enter  $dashboard\ dataset-field: Opportunity. Amount$
- To list datasets containing the case.CaseNumber sObject field, enter dataset object-field:case.CaseNumber



#### What's New In SQL and SAQL

Filter grouped results and search for patterns in strings with SQL's HAVING and LIKE functions, multivalue fields are now opt-in, and null dimensions are no longer ignored in SAQL.

#### IN THIS SECTION:

#### Introducing SQL for Tableau CRM (Beta)

SQL for Tableau CRM is a query language that lets you execute queries against your Tableau CRM datasets. Structured Query Language (SQL) is typically used for working with data stored in relational databases. Tableau CRM uses the ANSI SQL interface to access Tableau CRM's fast in-memory data store. It has native support of Salesforce features used in Tableau CRM, including sharing inheritance and custom fiscal calendars. In this release, there's added support for link widgets, receiving faceting, and adding multiple datasets to a SQL query.

#### Filter Grouped Query Results with SQL's HAVING Function

With the SQL for Tableau CRM (Beta) HAVING function, you can filter grouped results from grouped columns, aggregate functions, such as sum() and count(), and the grouping function, GROUP BY ROLLUP.

#### Fine-Tune Pattern Matching with SQL's LIKE Operator

With the SQL for Tableau CRM (Beta) LIKE comparison operator, you can match patterns found anywhere in a string.

### Opt Into Multivalue Fields in Query Results

SAQL's  $mv_{to_string}$  () function previously returned multivalue fields by default. Indexing multivalue fields can slow down dataflows, so we've disabled it by default and given you the option to enable it.

## Achieve Greater Query Accuracy with Null Handling for Dimensions (Beta)

Now you can include null dimensions in your datasets. This feature is distinct from the null handling for measures preference. Previously, SAQL queries were limited to non-null values only.

#### Introducing SQL for Tableau CRM (Beta)

SQL for Tableau CRM is a query language that lets you execute queries against your Tableau CRM datasets. Structured Query Language (SQL) is typically used for working with data stored in relational databases. Tableau CRM uses the ANSI SQL interface to access Tableau CRM's fast in-memory data store. It has native support of Salesforce features used in Tableau CRM, including sharing inheritance and custom fiscal calendars. In this release, there's added support for link widgets, receiving faceting, and adding multiple datasets to a SQL query.

**Where:** This change applies to Tableau CRM 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.

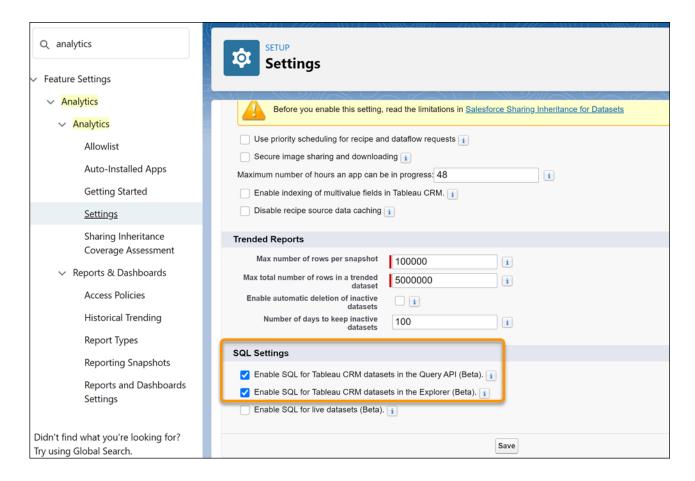
**Why:** SQL for Tableau CRM supports these standard SQL features:

- SELECT
- FROM
- WHERE
- GROUP BY
- GROUPING
- ROLLUP
- HAVING
- ORDER BY
- LIMIT
- OFFSET
- UNION
- CASE statements
- COALESCE
- NULLIF



**Note**: These features don't support the full range of cases covered by ANSI SQL. Refer to each statement in the SQL for Tableau CRM Developer Guide for more information.

How: From Setup, in the Quick Find box, enter Analytics, and select Settings. To work with SQL in the query API, select Enable SQL for Tableau CRM datasets in the Query API (Beta). To work with SQL in the Explorer, also select Enable SQL for Tableau CRM datasets in the Explorer (Beta).



#### SEE ALSO:

SQL for Tableau CRM Developer Guide: Introducing SQL for Tableau CRM (Beta) (can be outdated or unavailable during release preview)

#### Filter Grouped Query Results with SQL's HAVING Function

With the SQL for Tableau CRM (Beta) HAVING function, you can filter grouped results from grouped columns, aggregate functions, such as sum() and count(), and the grouping function, GROUP BY ROLLUP.

**Where:** This feature is available in Tableau CRM 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:** Here's an example of using the HAVING clause with the aggregate function count (). This query returns groups of cities that have more than 150 stores in each category. The HAVING clause returns counts greater than 150.

SELECT Category, City, count(\*) as cnt FROM "Superstore"
GROUP BY Category, City HAVING count(\*) > 150

Category	City	cnt
Furniture	Los Angeles	154
	New York City	192
Office Supplies	Houston	231

Category	City	cnt
	Los Angeles	443
	New York City	552
	Philadelphia	312
	San Francisco	322
	Seattle	249
Technology	New York City	171

Here's a simple example of how to use HAVING with GROUP BY ROLLUP. The query returns the profit for each Sub-Category, rolls them up into subtotals of each Category, and then sums up the grand total. Here, HAVING filters on positive profits.

SELECT Category, Sub\_Category, Sum(Profit) as TotalProfit FROM "Superstore" GROUP BY ROLLUP(Category, Sub\_Category) HAVING Sum(Profit) > 0;

Category	Sub-Category	TotalProfit	
Furniture	Chairs	26,590.17	
	Furnishings	13,059.14	
	-	18,451.27	
Office Supplies	Appliances	18,138.01	
	Art	6,527.79	
	Binders	30,221.76	
	Envelopes	6,964.18	
	Fasteners	949.52	
	Labels	5,546.25	
	Paper	34,053.57	
	Storage	21,278.83	
	-	122,490.8	
Technology	Accessories	41,936.64	
	Copiers	55,617.82	
	Machines	3,384.76	
-	Phones	44,515.73	
	-	145,454.95	
	-	286,397.02	

HAVING and WHERE provide filtering functionality for different ends. In the logical execution of a SELECT statement, WHERE filters out rows before any grouping or aggregate function runs. It selects the rows that can be passed to an aggregate function. WHERE comes before a GROUP BY statement. HAVING is always used with aggregate functions or grouped columns and comes after a GROUP BY statement.

SEE ALSO:

SQL for Tableau CRM Developer Guide: HAVING Clause (can be outdated or unavailable during release preview)

#### Fine-Tune Pattern Matching with SQL's LIKE Operator

With the SQL for Tableau CRM (Beta) LIKE comparison operator, you can match 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. \_1b 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 characters "ni" anywhere in the string. If the string contains "ni", then the condition evaluates to True and the query returns the name.

```
SELECT Customer_Name as 'name'
FROM "Superstore"
WHERE Customer_Name LIKE "%ni%";
GROUP BY Customer_Name;
LIMIT 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.

```
SELECT City as 'city'
FROM "Superstore"
WHERE City LIKE "_lb%";
GROUP BY 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."

```
SELECT City as 'city'

FROM "Superstore"

WHERE City LIKE "__lb%";

GROUP BY City;
```

```
city
Gilbert
Melbourne
```

Use NOT to exclude query results that match a pattern. This query returns the first five customer names in the dataset that don't contain "po."

```
SELECT Customer_Name as 'name'
FROM "Superstore"
WHERE Customer_Name NOT LIKE "%po%"
GROUP BY Customer_Name;
LIMIT 5;
```

name
Aaron Davies Bruce
Aaron Day
Aaron Dillon
Aaron Fuller Davidson
Aaron Riggs

SEE ALSO:

SQL for Tableau CRM Developer Guide: LIKE Clause (can be outdated or unavailable during release preview)

#### Opt Into Multivalue Fields in Query Results

SAQL's mv\_to\_string() function previously returned multivalue fields by default. Indexing multivalue fields can slow down dataflows, so we've disabled it by default and given you the option to enable it.

**Where:** This feature is available in Tableau CRM 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*, select **Settings**, and then select **Enable indexing of multivalue fields** in **Tableau CRM**.

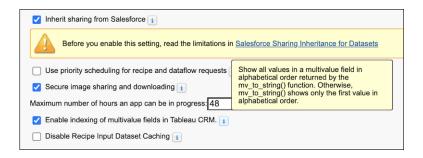


Tableau CRM SAQL Reference: mv\_to\_string() (Beta) (can be outdated or unavailable during release preview)

Tableau CRM SAQL Reference: Multivalue Field (can be outdated or unavailable during release preview)

#### Achieve Greater Query Accuracy with Null Handling for Dimensions (Beta)

Now you can include null dimensions in your datasets. This feature is distinct from the null handling for measures preference. Previously, SAQL queries were limited to non-null values only.

**Where:** This feature is available in Tableau CRM 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, the null handling for dimensions preference 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 null handling for dimensions preference in the in the Trailblazer Community.

**How:** To enable the null handling for dimensions preference, contact Salesforce Customer Support. From Setup, in the Quick Find box, enter *Analytics*, select **Settings**, and then select **Include null values in Tableau CRM queries**.

Here's an example of using the SAQL group-by function with the null handling preference enabled.

```
q = load "Superstore";
q = group q by 'Sub_Category';
q = foreach q generate 'Sub_Category' as 'Sub_Category', count() as 'count';
q = order q by 'Sub_Category' asc nulls first;
q = limit q 2000;
```

The first value that the query returns is a grouped count of four null rows.

Sub-Category	Count of Rows
-	4
Accessories	775

Sub-Category	Count of Rows
Appliances	466
Art	796
Binders	1,523
Bookcases	228
Chairs	617
Copiers	68
Envelopes	254
Fasteners	217
Furnishings	957
Labels	364
Machines	115
Paper	1,370
Phones	889
Storage	846
Supplies	190
Tables	319

Tableau CRM SAQL Reference: Null Operators (can be outdated or unavailable during release preview)

Tableau CRM SAQL Reference: group-by (can be outdated or unavailable during release preview)

Tableau CRM SAQL Reference: group-by rollup (can be outdated or unavailable during release preview)

#### Do More with Null Values in Dimensions and Dates (Beta)

It's now easier to work with null value records in your datasets. When a record's dimension or date field is left blank, it appears as a hyphen in explorer and dashboard designer charts and tables. Previously, to include a null value in your dataset, you assigned it a default value, such as an asterisk.

**Where:** This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



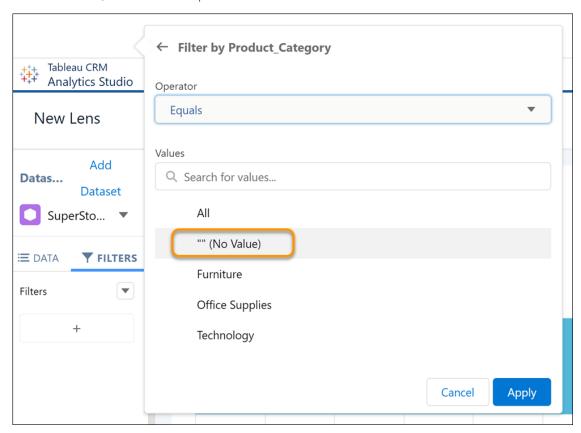
**Note:** As a beta feature, including null values in dimensions and dates for Tableau CRM Direct Data is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of 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.

**Why:** Let's say you want to analyze sales records that are missing a product category. Filtering this field by the null value makes it easier to review the data you're looking for. You can also group on, filter by, create interactions on, and apply conditional formatting to null values, and drill down on a null grouping. In dashboards, you can facet queries and apply global filters using the null and not null operators.

**How:** To enable the null handling preference, contact Salesforce Customer Support. From Setup, in the Quick Find box, enter *Analytics*, and select **Settings**. Then select **Include null values in Tableau CRM queries**, and save your settings.

To filter a dimension by null values, select "" (No Value) from the list of values in the filter panel or use the Is Null operator. To filter a date on null values, select the Is Null operator.



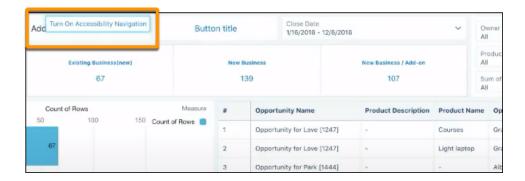
Note: In dashboards, the null and not null operators aren't supported on date widgets.

## Use Dashboards with Improved Accessibility

Navigate and interact with dashboards with improved accessibility such as assistive text, keyboard controls, and color contrast. For example, manage saved views, interact with buttons and alerts, and use widget tooltips more easily.

**Where:** This change applies to Tableau CRM 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 tooltips for added context when navigating widgets. To turn on tooltips in widgets that support them, tab to a widget. The **Turn On Accessibility Navigation** button is highlighted. Press *Enter* to turn on widget tooltips.



Salesforce Help: Keyboard Shortcuts for Building Tableau CRM Dashboards and Lenses (can be outdated or unavailable during release preview)

# **Einstein Discovery**

Einstein Discovery for Reports, formerly known as Einstein Data Insights, lets you see what's changed in your data analysis between report runs. Increase prediction transparency with model cards to help you document and communicate important usage information about your predictions. Produce better models with feature engineering enhancements that let you bucket categories with fuzzy matching and impute missing values.

#### IN THIS SECTION:

#### Compare Report Versions and Explore Insights with Einstein Discovery for Reports

Einstein Discovery for Reports, formerly known as Einstein Data Insights, lets you quickly see what's changed in your data analysis between report runs. Einstein summarizes the impact of the changes and allows you to drill down into your data for detailed, side-by-side comparisons. Insight enhancements include an analysis summary panel, automatic filtering for statistically significant insights, and insight filtering by impact type (positive or negative) on the analyzed column.

#### Increase Prediction Transparency with Model Cards (Generally Available)

Einstein Discovery introduces model cards to help you document and communicate important usage information about your predictions. A model card shows statistics associated with the data that's 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 to 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 (Generally Available)

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 (Generally Available)

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, 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.

#### Implement External Models in Your Salesforce Org (Pilot)

Augment your predictive powers with externally built models that you can quickly start using in production. 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, upload and deploy them in Salesforce, and your users can start working toward better outcomes using the model's predictions.

#### Predict Outcomes for Multiple Categories with Multiclass Models (Pilot)

Einstein Discovery introduces multiclass models to allow you to predict probable outcomes among up to 10 categories. For example, an insurance company can predict which of nine policies an applicant is most likely to choose. Support for multiclass models adds a third use case to the numeric and binary classification use cases that Einstein Discovery already supports. With multiclass models, Einstein Discovery opens up predictive analytics for a whole new universe of possible solutions for your business.

#### Show Time-Based Predictions Using Relative Start Dates

Now you can customize the Einstein Predictions component to calculate time-based predictions using a relative start date. For example, you create an opportunity that Einstein predicts takes 100 days to close. By default, Einstein displays 100 days on the page even 99 days after the opportunity is created. But if you base the prediction on a relative date, the Create Date, then after 99 days, the page displays 1 day. And you can format the prediction to show as the time remaining: 1 day, or as a date: tomorrow's date.

#### Monitor Prediction Requests Across All Deployed Models

In Model Manager, the usage monitoring graph now shows total predictions and performance warnings for all deployed models, regardless of the prediction field selection. Previously, the graph showed activity statistics only for models associated with Salesforce objects that used automated prediction fields. In this release, Model Manager adds tracking for prediction API requests. Totals now include prediction requests originating from Einstein Discovery in Tableau, REST API calls, Apex calls, bulk scoring jobs, predictions embedded in Lightning and Experience pages, and Discovery Predict nodes in Data Prep recipes. Having a more comprehensive and accurate view of model consumption across your business helps you fine-tune your models to produce better predictions.

#### Translate Unstructured Data into Valuable Insights with Sentiment Analysis in Einstein Discovery (Pilot)

Comments, survey data, or other forms of customer feedback often contain some of the richest information in your datasets. Now, Einstein Discovery processes unstructured data during story creation and categorizes sentiment as positive, negative, or neutral. For example, "Love the new fall colors" is positive, "The movie was okay" is neutral, and "Not a great experience" is negative. Einstein Discovery enables you to detect customer emotions and tags this information for meaningful analysis. Previously, data like this was often regarded as unusable due to the time, budget, and expertise required for sentiment analysis.

#### Get Quick and Insightful Analysis With Insight Summary Panels

See your most important insights first. Einstein Discovery now includes Insight Summary Panels when you open a story. One panel shows variables that have a positive impact on the story outcome and the other shows variables that have a negative impact. Then you can explore the variables that you're interested in, with first and second order insights more discoverable than ever.

#### Consume Einstein Discovery Story Insights Anywhere

Use the Insights API to embed insights from your story into any website, application, or dashboard. Insights generated as a story contain values that quantify the impact on the selected story goal, and narrative descriptions of those values. With the Insights API, client applications can obtain a summary of the top positive and negative insights, query insight details further, and then apply their own narratives to the insight values.

#### Preserve Filtered Lenses in a Story

Lens filters now stay put to save you time. When you create a story from a filtered lens, Einstein Discovery maintains the filters in story setup. Previously, filters were dropped, requiring you to recreate them.

#### Replace Deployed Models Easily

Streamlined navigation in Einstein Discovery makes it easier than ever to replace models that are deployed. If you have previously deployed a model from a story, Einstein Discovery automatically selects the model to replace.

#### View Consolidated Improvements and Easily Drill Into Details

Einstein Discovery now consolidates related improvements on Lightning record pages and Experience pages. You can easily expand the consolidated view to see the underlying details.

SEE ALSO:

Einstein Release Notes

# Compare Report Versions and Explore Insights with Einstein Discovery for Reports

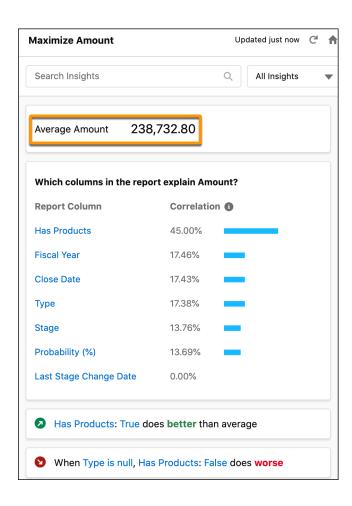
Einstein Discovery for Reports, formerly known as Einstein Data Insights, lets you quickly see what's changed in your data analysis between report runs. Einstein summarizes the impact of the changes and allows you to drill down into your data for detailed, side-by-side comparisons. Insight enhancements include an analysis summary panel, automatic filtering for statistically significant insights, and insight filtering by impact type (positive or negative) on the analyzed column.

**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.

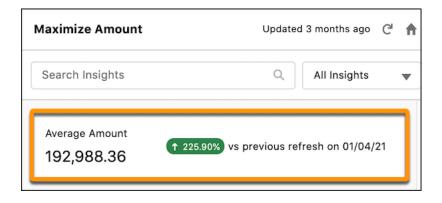
**How:** Open a report, then click **Analyze**.



Select a goal, then run the analysis. Einstein displays an analysis summary just below the Search Insights box.



Run the report with updated data, then create a new analysis. Einstein displays a change summary that shows you the net difference between versions.



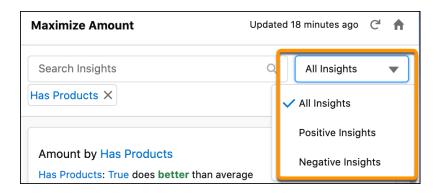
To compare versions side-by-side, click the summary.



By default, the only insights you see are the most statistically significant insights. To see all insights, scroll to the bottom of the insights list, and click **Show insights that are not significant**.



You can filter the insights list by impact (positive or negative) on the goal you selected for analysis.



Einstein Discovery

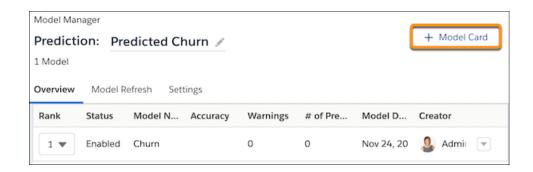
Salesforce Help: Analyze Reports with Einstein Discovery for Reports (can be outdated or unavailable during release preview)

# Increase Prediction Transparency with Model Cards (Generally Available)

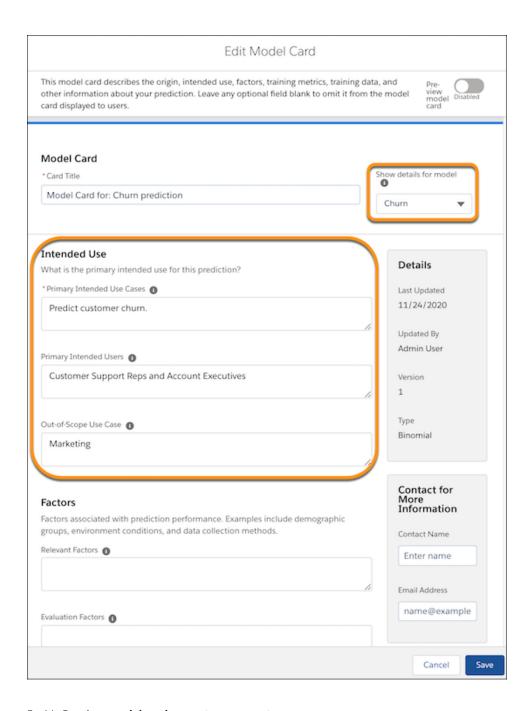
Einstein Discovery introduces model cards to help you document and communicate important usage information about your predictions. A model card shows statistics associated with the data that's used to train the model. It can also show any optional explanations you provide about the prediction's intended use, design assumptions, target audience, capabilities and limitations, and other relevant information. Disclosing these details helps users to understand predictions and differentiate among multiple predictions. Then they can make ethical, informed decisions about whether a prediction suits their use case.

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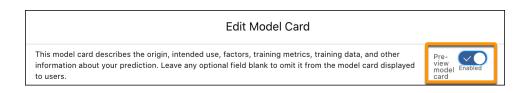
**How:** In Model Manager, view a prediction, then click + **Model Card**.



In the form, 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.

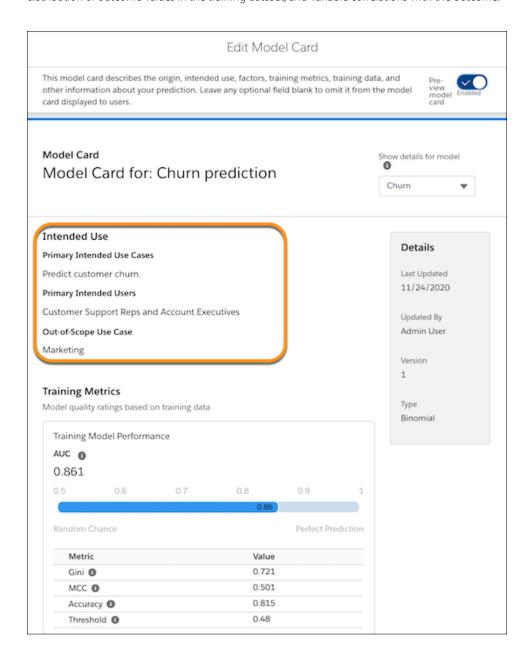


Enable **Preview model card** to preview your settings.

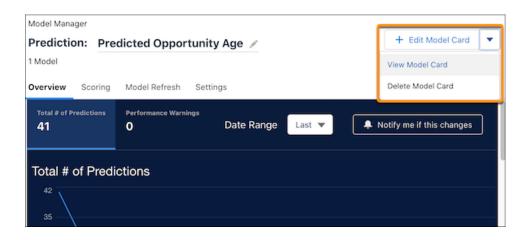


Note: Only completed fields appear—empty fields are omitted.

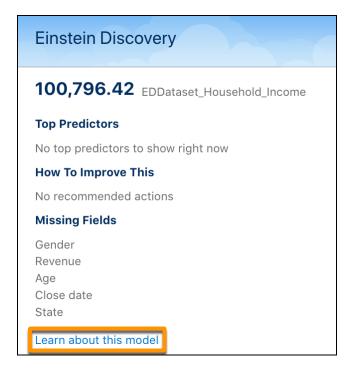
The model card also shows model statistics associated with the data used to train the model, including model quality ratings, the distribution of outcome values in the training dataset, and variable correlations with the outcome.



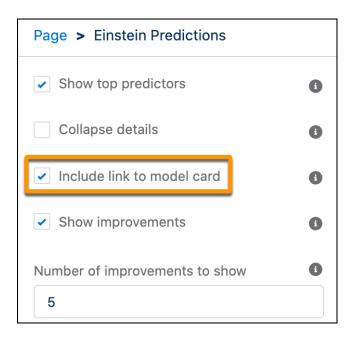
To share a Model Card, download it as a .pdf file. View a prediction definition in Model Manager, choose **View Model** from the Edit Model Card menu, and then click **Download**.



You can allow users to view the model card on a Lighting record page or Experience page.



To show the **Learn about this model** link, edit the page in Lightning App Builder or Experience Builder, configure the Einstein Prediction component, enable **Include link to model card**, and save.



Einstein Discovery

# Impute Missing Values to Improve Model Performance (Generally Available)

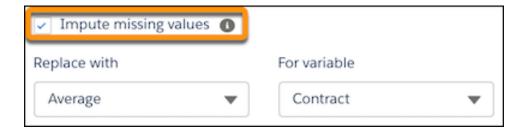
Too many missing values from unknown or problem data can lower the quality of your model. Einstein Discovery now allows you to impute missing numerical values in your dataset. Enable statistical imputation on a numeric variable, and then Einstein Discovery automatically replaces missing values with values derived from another subset of your data.

**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:** 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

# Get Better Predictions with Typographic Fuzzy Matching (Generally Available)

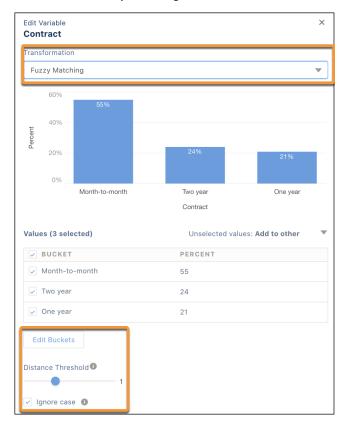
Einstein Discovery introduces fuzzy matching to smooth over spelling variations, resulting in smarter categorizations and better predictions. Spelling variations in categorical data can split observations into separate categories when they really belong to the same category. Differences in capitalization, 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.

**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:** Einstein uses the Levenshtein algorithm for fuzzy matching. The default 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:** In story settings, select the text variable that contains spelling variations. In **Edit Variable**, click the **Transformation** dropdown menu and select **Fuzzy Matching**. Use the slider below **Distance Threshold** to set your edit distance.



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 production. 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, upload and deploy them in Salesforce, and your users can start working toward better outcomes using the model's predictions.



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

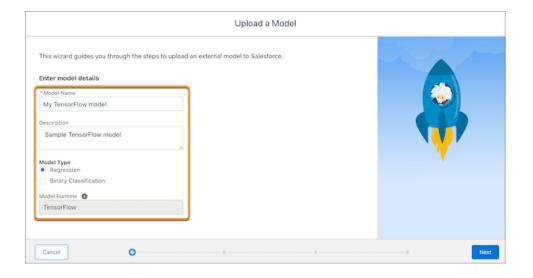
You can provide feedback and suggestions for this feature in the applicable IdeaExchange group in the Trailblazer Community.

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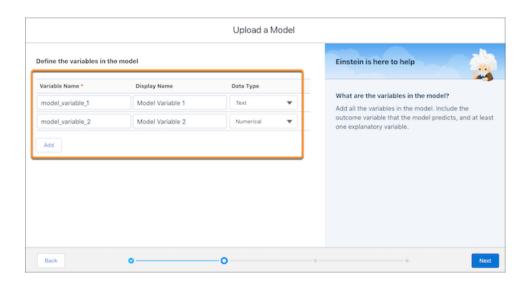
**How:** If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

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 the variables in the model.



Click **Next**, and then select the outcome that the model predicts. Click **Next**, select the .zip file containing the model files, and then click **Done**. You can deploy the model immediately into your Salesforce environment. Or to add it to the uploaded Files tab for deployment later, click **Close**.

SEE ALSO:

**Einstein Discovery** 

# Predict Outcomes for Multiple Categories with Multiclass Models (Pilot)

Einstein Discovery introduces multiclass models to allow you to predict probable outcomes among up to 10 categories. For example, an insurance company can predict which of nine policies an applicant is most likely to choose. Support for multiclass models adds a third use case to the numeric and binary classification use cases that Einstein Discovery already supports. With multiclass models, Einstein Discovery opens up predictive analytics for a whole new universe of possible solutions for your business.



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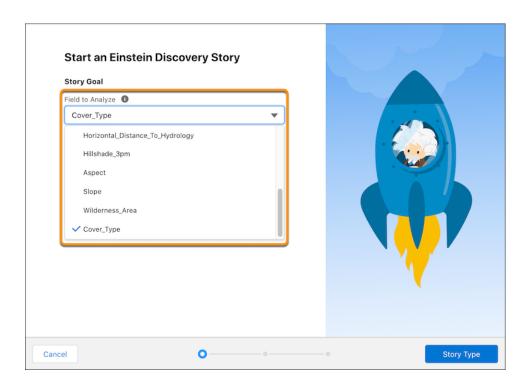
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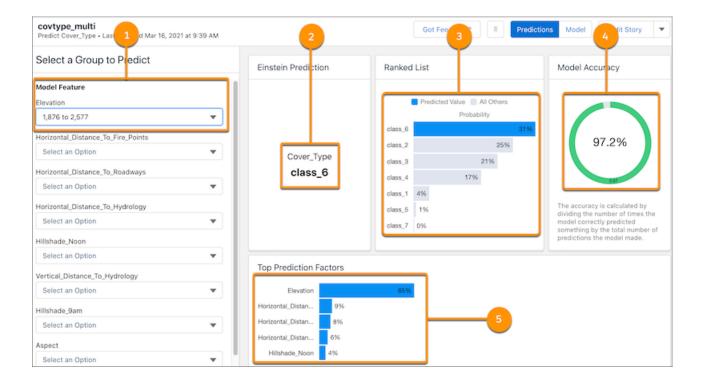
During story creation, in the Field to Analyze list, select a text column that contains 3 to 10 unique categories.



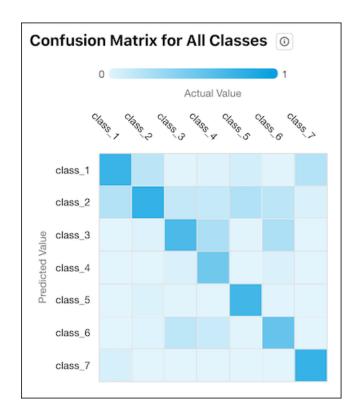
Note: Minimize and Maximize are relevant in numeric and binary classification use cases, but not in multiclass models.



When the story is created, Einstein Discovery generates the predictive model and takes you to the Predictions tab, where you can conduct what if probability calculations for different classes and groups. Select a group to predict (1). You see which class Einstein Discovery predicted as the most likely outcome (2) along with ranked probabilities (3), the model accuracy for the predicted class (4), and top prediction factors (5).



Model metrics for multiclass models show evaluative statistics per class and in the aggregate (all classes). For example, the Confusion Matrix for All Classes shows you, at a glance, how accurately the model predicts each class.



Where the row and column for each class intersect in the table, the color of the square indicates the model's accuracy. The legend shows a color progression from 0 to 1, with 1 representing 100% accuracy. In this example, the darker blue diagonal indicates a high percentage of true positives.

SEE ALSO:

**Einstein Discovery** 

# Show Time-Based Predictions Using Relative Start Dates

Now you can customize the Einstein Predictions component to calculate time-based predictions using a relative start date. For example, you create an opportunity that Einstein predicts takes 100 days to close. By default, Einstein displays 100 days on the page even 99 days after the opportunity is created. But if you base the prediction on a relative date, the Create Date, then after 99 days, the page displays 1 day. And you can format the prediction to show as the time remaining: 1 day, or as a date: tomorrow's date.

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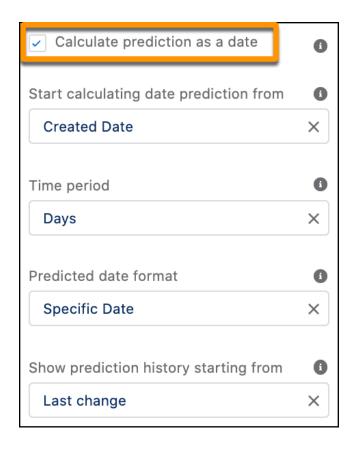
#### How:



Note: You can embed the Einstein Predictions component on Lightning record pages and Experience pages.

In Lightning App Builder, edit a record page. In Experience Builder, edit a site page.

Add or configure the Einstein Predictions component. In the settings panel, select **Calculate prediction as a date**, and configure the settings that follow.



To start the prediction from a relative date, click **Start calculating date prediction from**, and select a date field on the object. Select the **Predicted date format**:

- Time Remaining formats the prediction according to the selected Time period.
- **Specific Date** formats the prediction as a date according to the logged-in user's locale settings.

This figure compares the formatting of time remaining (1) and specific date (2).



#### SEE ALSO:

Einstein Discovery

Salesforce Help: Add Einstein Predictions to a Lightning Page (can be outdated or unavailable during release preview)

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

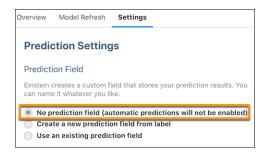
Salesforce Help: Edit Pages and Components in Experience Builder (can be outdated or unavailable during release preview)

# Monitor Prediction Requests Across All Deployed Models

In Model Manager, the usage monitoring graph now shows total predictions and performance warnings for all deployed models, regardless of the prediction field selection. Previously, the graph showed activity statistics only for models associated with Salesforce objects that used automated prediction fields. In this release, Model Manager adds tracking for prediction API requests. Totals now include prediction requests originating from Einstein Discovery in Tableau, REST API calls, Apex calls, bulk scoring jobs, predictions embedded in Lightning and Experience pages, and Discovery Predict nodes in Data Prep recipes. Having a more comprehensive and accurate view of model consumption across your business helps you fine-tune your models to produce better predictions.

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**How:** In Model Manager, open any active prediction definition that doesn't use automated prediction fields. Confirm that **No prediction field** is selected on the Settings tab.



To see the number prediction API requests from any source, such as in Apex or from Einstein Discovery in Tableau, switch to the Overview tab.



Note: Model Manager currently doesn't track prediction requests from prediction Transformation nodes in dataflows.

To change the date range for the graph, try the new date selector.



**Einstein Discovery** 

# Translate Unstructured Data into Valuable Insights with Sentiment Analysis in Einstein Discovery (Pilot)

Comments, survey data, or other forms of customer feedback often contain some of the richest information in your datasets. Now, Einstein Discovery processes unstructured data during story creation and categorizes sentiment as positive, negative, or neutral. For example, "Love the new fall colors" is positive, "The movie was okay" is neutral, and "Not a great experience" is negative. Einstein Discovery enables you to detect customer emotions and tags this information for meaningful analysis. Previously, data like this was often regarded as unusable due to the time, budget, and expertise required for sentiment analysis.



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

You can provide feedback and suggestions for this feature 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. In story settings, select the variable that contains your unstructured data. In **Edit Variable**, click the **Transformation** dropdown menu and select **Sentiment Analysis**.



SEE ALSO:

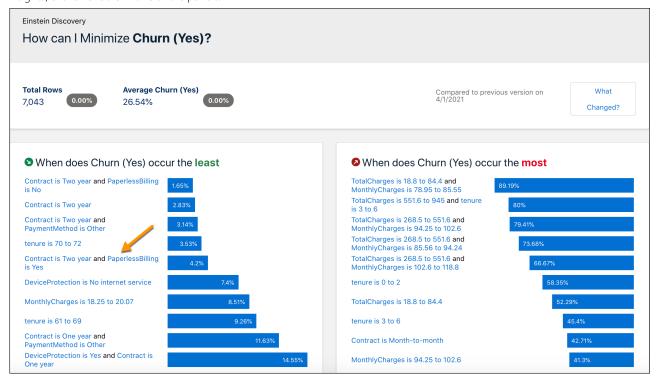
Einstein Discovery

# Get Quick and Insightful Analysis With Insight Summary Panels

See your most important insights first. Einstein Discovery now includes Insight Summary Panels when you open a story. One panel shows variables that have a positive impact on the story outcome and the other shows variables that have a negative impact. Then you can explore the variables that you're interested in, with first and second order insights more discoverable than ever.

**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:** Open a story. The Insight Summary Panels appear in the center of the page. To get more insights, including first and second order insights, click a variable in one of the panels.



SEE ALSO:

Einstein Discovery

# Consume Einstein Discovery Story Insights Anywhere

Use the Insights API to embed insights from your story into any website, application, or dashboard. Insights generated as a story contain values that quantify the impact on the selected story goal, and narrative descriptions of those values. With the Insights API, client applications can obtain a summary of the top positive and negative insights, query insight details further, and then apply their own narratives to the insight values.

**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 and run the API, you need the Use Einstein Discovery system permission.

SEE ALSO:

Einstein Discovery

Salesforce Help: Get Descriptive Insights Programmatically (can be outdated or unavailable during release preview)

# Preserve Filtered Lenses in a Story

Lens filters now stay put to save you time. When you create a story from a filtered lens, Einstein Discovery maintains the filters in story setup. Previously, filters were dropped, requiring you to recreate 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: Open a filtered lens or create a lens with filters. Click the create story icon





Lens filters are automatically carried over to story setup and appear with your variables.



SEE ALSO:

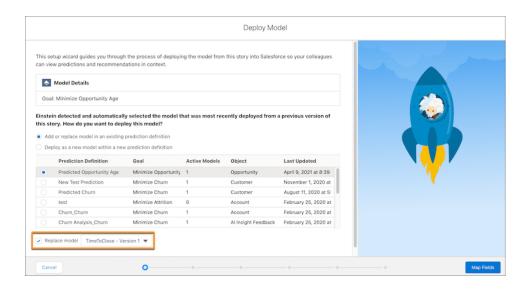
Einstein Discovery

# Replace Deployed Models Easily

Streamlined navigation in Einstein Discovery makes it easier than ever to replace models that are deployed. If you have previously deployed a model from a story, Einstein Discovery automatically selects the model to replace.

**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:** Open a story with a previously deployed model and choose **Deploy Model** from the Edit Story menu. Einstein Discovery automatically selects a prediction definition and model to update.



If you don't want to replace the selected model, change your settings to take a different action.

SEE ALSO:

Einstein Discovery

Salesforce Help: Deploy to a New or Existing Prediction Definition (can be outdated or unavailable during release preview)

# View Consolidated Improvements and Easily Drill Into Details

Einstein Discovery now consolidates related improvements on Lightning record pages and Experience pages. You can easily expand the consolidated view to see the underlying details.

**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:** Open a Lightning record page or Experience page that shows improvements. Consolidated improvements appear with an expand arrow.

# Likelihood of Churn



# Not likely...

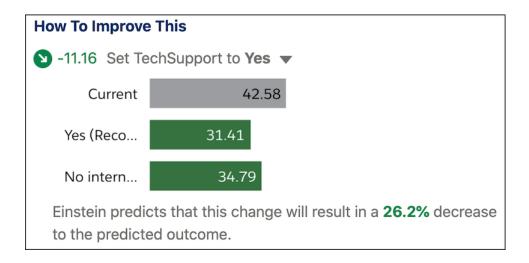
# **Top Predictors**

- 2.4 Contract is Two year
- -1.68 Partner is true and Contract is Two year
- 1.66 InternetService is Fiber optic

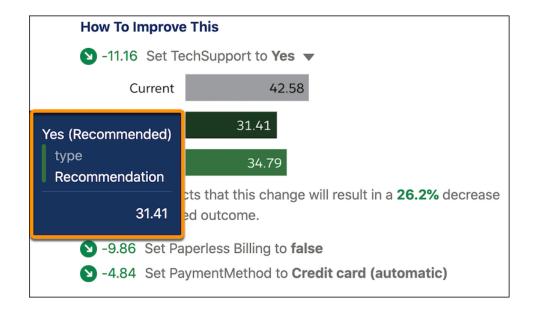
# **How To Improve This**

- -11.16 Set TechSupport to Yes
- -9.86 Set Paperless Billing to false
- -4.84 Set PaymentMethod to Credit card (automatic)

Expand the improvement to see its details.



Hover over a bar to view additional information.



SEE ALSO:

Einstein Discovery

# 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.

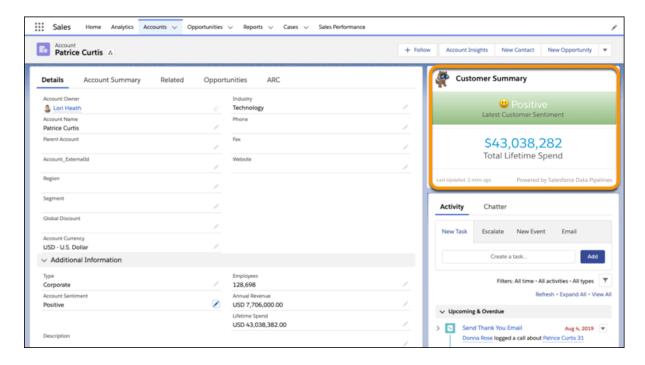
**Why:** Data Pipelines enables you to enrich your Salesforce data with other critical information that users need to make more informed decisions. For example, to enable customer support agents to provide premium service to large accounts and proactively reach out to unsatisfied customers, you build this recipe.



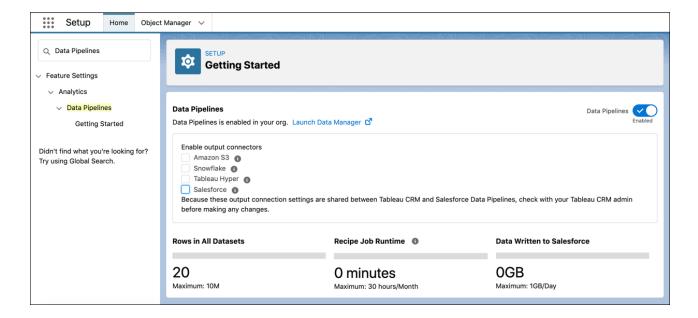
A recipe is a sequence of transformations that Tableau CRM performs on source data before loading it into a target. This recipe calculates the lifetime spend of each customer by aggregating opportunity amounts for each account. It pulls this data from the Salesforce objects: Opportunity and Opportunity 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.

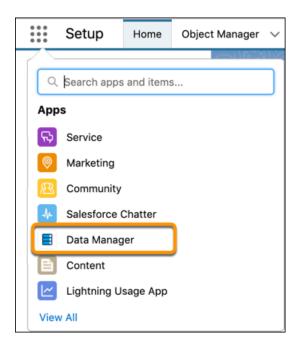


How: To set up Data Pipelines, from Setup, in the Quick Find box, enter Data Pipelines, and then click Getting Started.



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 (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Salesforce Data Pipelines (can be outdated or unavailable during release preview)

Salesforce Help: Modify and Enrich Salesforce Data with Recipes (can be outdated or unavailable during release preview)

# Tableau CRM for Everyone

Meet your more intuitive and personalized Tableau CRM home page, and assemble collections of Tableau CRM items from across your org to customize your home page and share analytics with your team.

#### IN THIS SECTION:

#### Feel at Home in the New Tableau CRM Home Page

Tableau CRM is excited to announce its new intuitive and personalized interface. In the background, Tableau CRM automatically updates the interface of the latest item changes that you're following, and makes smart recommendations of new items others are viewing. To greet users and nurture engagement, admins can build and pin curated items to the home page. Users can also build their own set of collections to personalize their home page.

#### Curate and Share Insights with Tableau CRM Collections

Tableau CRM collections are like playlists for your lenses and dashboards. Collections let you manage your own group of items and personalize your home page. You can curate the perfect collection to stay organized by adding the dashboards and lenses that you care about, even if they're spread across multiple apps. Organize items in your collection to your liking, then share and get input from other users. After you curate the collection, subscribe to it to receive your favorite insights in your inbox.

#### Subscribe to Multiple Shared Collections

Reduce analytics guesswork for your users with subscriptions that deliver collections of their most important lenses directly to their inbox. As part of the new Tableau CRM collections feature, your users can subscribe to collections that you create and share with them. Each user can subscribe to four collections, and each collection subscription has its own schedule for when users receive Tableau CRM email. Collection subscriptions show lenses only, but users can still subscribe directly to dashboard widgets.

#### Discover Relevant Dashboards with Smart Recommendations

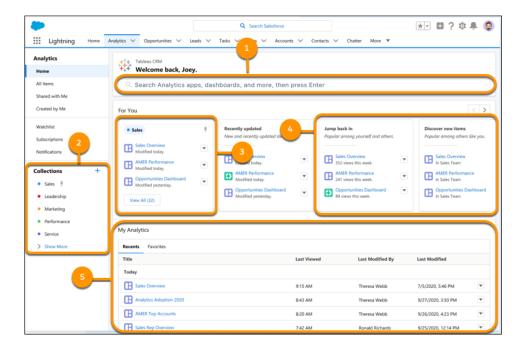
New smart recommendation cards on the Tableau CRM home page surface the dashboards related to your work. Using intelligence from Tableau CRM's unique view of your org, the personalized recommendations pinpoint your important analytics, show what's currently popular, and increase discoverability of analytics you haven't seen before.

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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:** Select the Tableau CRM Analytics Studio from the **App Launcher**. Use Semantic Searches in the search bar (1) to find results beyond matches to exact keywords. Curate and share your own group of items with **Collections** (2). Get trusted content pinned (3) to your home page. Find what's most relevant to you at any point in time and discover new insights with Intelligent Recommendations (4). Find your recently accessed content with ease and speed through the reimagined **Recents** (5) tab.



Find Dashboards and Datasets by Field Using Semantic Search Discover Relevant Dashboards with Smart Recommendations Curate and Share Insights with Tableau CRM Collections

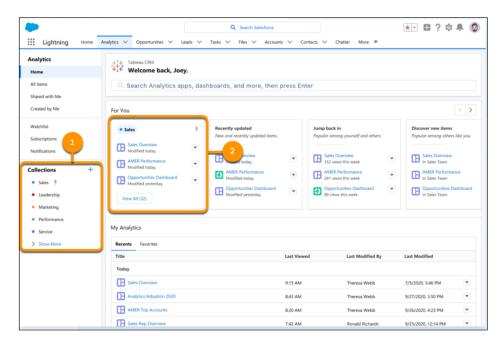
# Curate and Share Insights with Tableau CRM Collections

Tableau CRM collections are like playlists for your lenses and dashboards. Collections let you manage your own group of items and personalize your home page. You can curate the perfect collection to stay organized by adding the dashboards and lenses that you care about, even if they're spread across multiple apps. Organize items in your collection to your liking, then share and get input from other users. After you curate the collection, subscribe to it to receive your favorite insights in your inbox.

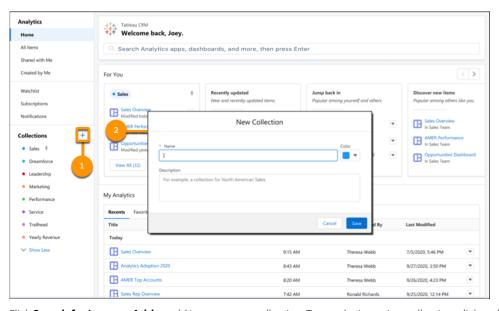
**Where:** This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who Anyone can create and share collections. Pinning collections to the home page requires the Manage Tableau CRM permission.

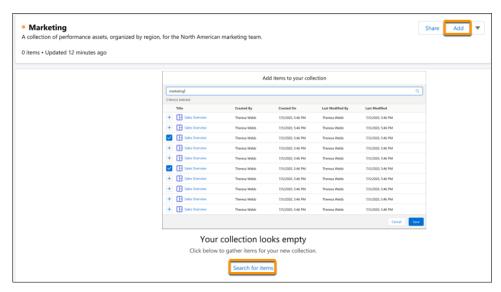
**How:** Create groupings of important items to personalize the home page and give quick access to the items that you need (1). Pin collections (2) that target different types of users and deliver a home experience that is tailored to their specific role and function.



To create a collection, click + (1). In the **New Collection** window (2), give your collection a name, and describe what the collection is about.

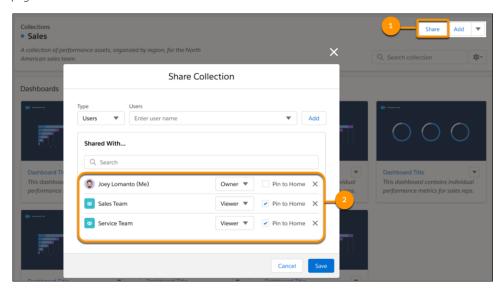


Click **Search for items** or **Add** to add items to your collection. To reorder items in a collection, click and drag them to their new location.



Click **Share** (1) to share a collection with users, groups, or roles. You can grant users a Viewer, Editor, or Manager role. Viewers can view the contents of the collection. Editors can add, remove, and reorder items in the collection. Managers can change sharing settings, edit collection properties, and delete the collection.

Admins and managers with the **Manage Tableau CRM** permission can check **Pin to Home** (2) to add the collection to users' home pages.



SEE ALSO:

Subscribe to Multiple Shared Collections

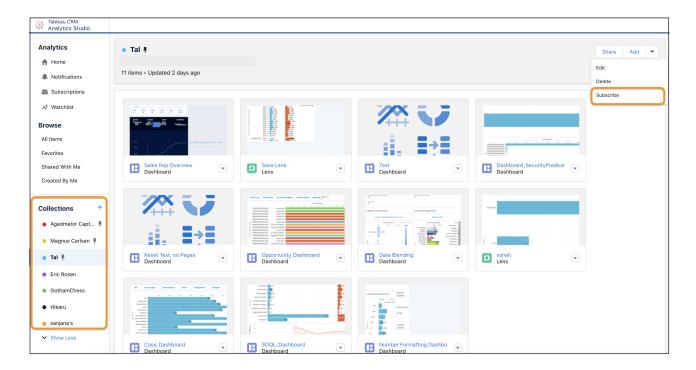
# Subscribe to Multiple Shared Collections

Reduce analytics guesswork for your users with subscriptions that deliver collections of their most important lenses directly to their inbox. As part of the new Tableau CRM collections feature, your users can subscribe to collections that you create and share with them. Each user can subscribe to four collections, and each collection subscription has its own schedule for when users receive Tableau CRM email. Collection subscriptions show lenses only, but users can still subscribe directly to dashboard widgets.

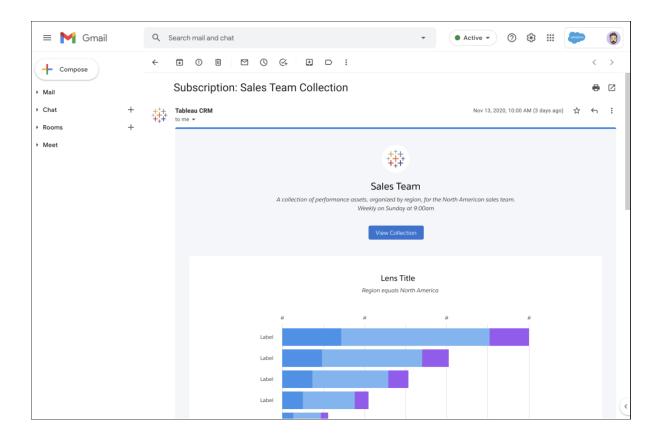
**Where:** This change applies to Tableau CRM (formerly Einstein Analytics) in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**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:** To subscribe to a collection, select **Subscribe** in the menu on the collection's page.



Subscription emails include a link to the collection on the Tableau CRM home page and direct links to each lens.

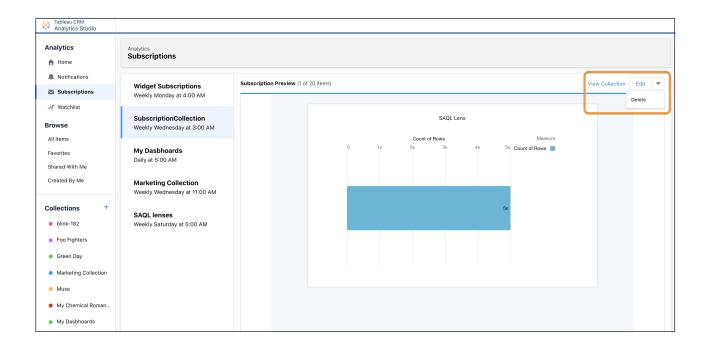


In this release, lenses in Salesforce Analytics Query Language (SAQL) format appear as charts and tables in the email. If a lens isn't in SAQL format, the email provides only the link to the lens within Tableau CRM. To convert a lens to SAQL, open it in the explorer's Query Mode, run the query, and then save.



Tip: When creating collections for others, keep in mind that the subscription email presents the first 20 lenses in the collection. Curate your collection by sliding the thumbnails within the collection so that your users receive their most important lenses. Save lenses in SAQL format, and be sure that users have access to them.

Direct subscriptions to widgets and lenses are now grouped in Widget Subscriptions (formerly called Default), and they work the same way as before. To remove either the widget subscription or a collection subscription, open the subscription preview menu, and select **Delete**.



#### SEE ALSO:

Curate and Share Insights with Tableau CRM Collections

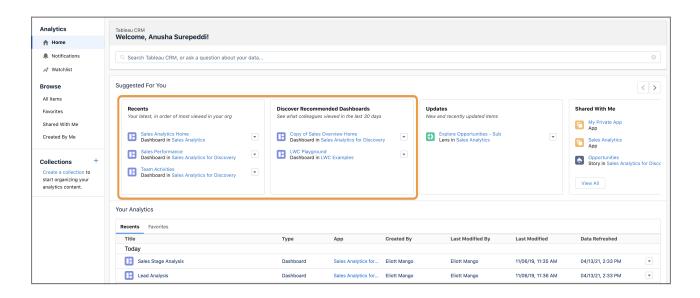
Salesforce Help: Subscribe to Multiple Shared Collections(can be outdated or unavailable during release preview)

# Discover Relevant Dashboards with Smart Recommendations

New smart recommendation cards on the Tableau CRM home page surface the dashboards related to your work. Using intelligence from Tableau CRM's unique view of your org, the personalized recommendations pinpoint your important analytics, show what's currently popular, and increase discoverability of analytics you haven't seen before.

**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:** Find the smart recommendations cards in the Suggested for You section. The cards appear as soon as you start working in Tableau CRM, if your org has multiple people using dashboards.



The **Recents** card lists dashboards you viewed lately that are also popular with colleagues in your org. The dashboards are listed in most viewed order, providing insight into what people with usage patterns similar to yours are viewing.

The **Discover Recommended Dashboards** card lists dashboards you haven't seen but could be relevant to you, based on their popularity over the last 30 days. If colleagues are viewing them, these dashboards could have insights for you.



**Note**: Recommendations adhere to Tableau CRM user sharing rules and row-level security. Smart recommendation cards show only dashboards that you can access.

# **Analytics Mobile Apps**

Minimize taps and use dashboards instantly with web tabs, and easily get back to your dashboard after you complete other tasks.

#### IN THIS SECTION:

## Make Dashboards Instantly Interactive

Tired of the extra tap it takes to open a dashboard before you start using it? Now your mobile users can launch actions, tap links, and apply filters instantly when you add your dashboard to a web tab. Web tabs aren't new, but using them to make mobile dashboards faster is.

# Move Between Dashboards and Actions Quickly with Enhanced Mobile Navigation

Now it's easier to return to your dashboard. Tap dashboard links and create records from your dashboard. Then tap your way back and keep your dashboard filters and settings.

## Get the Latest Version of Tableau CRM for iOS and Android

To benefit from the latest enhancements and bug fixes, upgrade to version 13.1 of Tableau CRM for iOS and Android.

# Make Dashboards Instantly Interactive

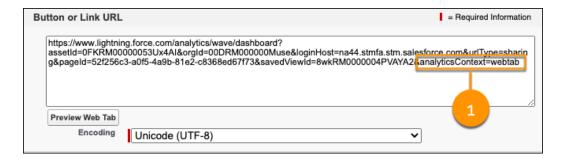
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**Where:** This change applies to Lightning Experience and Tableau CRM in the Salesforce mobile app for iOS. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

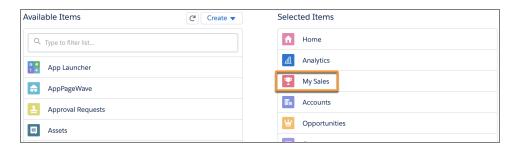
**How:** To make dashboards instantly usable, create a web tab, add your dashboard URL, and then add the tab to your users' navigation. From Setup, in the Quick Find box, enter *Tabs*, then select **Tabs**. Create and customize a web tab. For example, create a My Sales tab so your Sales team can access your interactive sales opportunity dashboard.



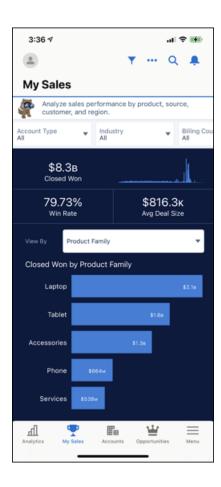
Add your dashboard URL to the web tab. To get the dashboard URL, open it on desktop, select **Share**, and then select **GET URL**. Paste the URL into your web tab and change analyticsContext from <code>analyticsTab</code> to <code>webtab</code> (1).



Add the tab to your users' navigation in Lightning App Builder.



Now your users can instantly interact with the dashboard.



## SEE ALSO:

Salesforce Help: Create Web Tabs (can be outdated or unavailable during release preview)

Salesforce Help: Lightning App Navigation Bar Items (can be outdated or unavailable during release preview)

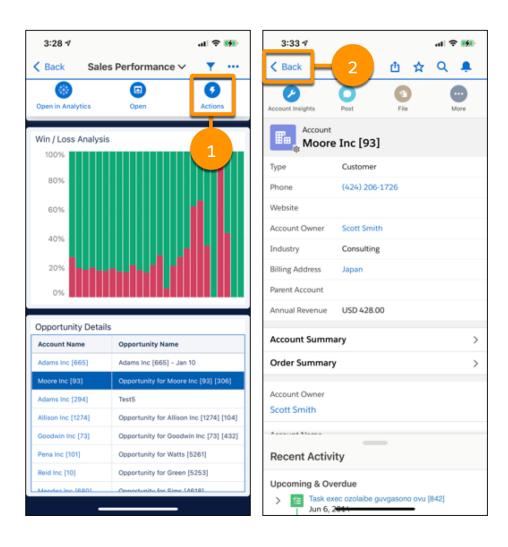
Salesforce Help: View Embedded Dashboards on Mobile Devices (can be outdated or unavailable during release preview)

# Move Between Dashboards and Actions Quickly with Enhanced Mobile Navigation

Now it's easier to return to your dashboard. Tap dashboard links and create records from your dashboard. Then tap your way back and keep your dashboard filters and settings.

**Where:** This change applies to Lightning Experience and Tableau CRM in the Salesforce mobile app for iOS. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Keeping your dashboard context keeps you on task. For example, create a task using a dashboard action (1). Then easily navigate back to the dashboard (2) with your filters and settings still applied.



SEE ALSO:

Salesforce Help: Which Analytics Mobile Experience Do I Use? (can be outdated or unavailable during release preview)

# Get the Latest Version of Tableau CRM for iOS and Android

To benefit from the latest enhancements and bug fixes, upgrade to version 13.1 of Tableau CRM for iOS and Android.

**Where:** These changes apply to Tableau CRM for iOS and Tableau CRM for Android. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** For the latest enhancements, download Tableau CRM from the App Store or Google Play.

Check out what's new in Tableau CRM for iOS.

- New in version 13.1.
  - Get fresh insights without internet access. Now your offline data is automatically updated.
  - Get the whole picture even when you're not connected. Images now show in dashboards in offline mode.
  - Support for Tableau CRM Direct Data for Snowflake, as well as SQL for live datasets.
  - Bug fixes.

- New in version 13.0.
  - Support for Summer '21 features, including rich text support.
  - Bug fixes and other usability enhancements.

Check out what's new in Tableau CRM for Android.

- New in version 13.1.
  - Support for Tableau CRM Direct Data for Snowflake, as well as SQL for live datasets.
  - Easily read and analyze tabular data on your mobile device with merged cells in compare tables.
  - An updated range widget now matches what you see on desktop.
  - Bug fixes.
- New in version 13.0.
  - Support for Summer '21 features, including rich text support.
  - Bug fixes and other usability enhancements.

#### SEE ALSO:

Salesforce Help: Which Analytics Mobile Experience Do I Use? (can be outdated or unavailable during release preview)

# Commerce

Salesforce B2B2C Commerce on Lightning Experience brings the power of the Salesforce platform to your end-to-end B2C storefront commerce solutions. B2B Commerce includes enhancements that make it easier for admins to set up the app and for store managers to manage their products, improvements to Einstein search suggestions, and new checkout and integration options. Omnichannel Inventory provides an updated core flow action. Salesforce Order Management introduces new flows that let you manage and track return orders, the ability to use order data in Marketing Cloud, and new shopper self-service functionality.

#### IN THIS SECTION:

## B2B2C Commerce (Generally Available)

Leverage and extend the Lightning platform's functionality with the B2B2C Commerce license to build self-service stores for your shoppers. B2B2C Commerce is built natively on the Salesforce platform. When you configure your B2B2C Commerce solution, you can rely on the trusted power, security, and scalability of all the standard Salesforce platform technologies. B2B2C Commerce and B2B Commerce share the Salesforce Commerce data model, search, recommendations, guided storefront setup experience, shared base components, and partner ecosystem. All of which provide you with a consistent experience for building an end-to-end D2C B2C storefront. For a fun introduction to B2B2C Commerce, check out the Sell Direct to Consumers with Salesforce B2B2C Commerce video.

#### B2B Commerce for Lightning

Enable B2B Commerce to access the Commerce app, objects, and workspaces. Store managers can customize their hybrid lists to make it easier for them to manage their products. Einstein search suggestions make it easier for customers to find the products that they're looking for. And that's not all.

# **Omnichannel Inventory**

Enhancements to Omnichannel Inventory include an updated flow core action.

## Salesforce Order Management

Salesforce Order Management adds a new Return Management Authorization workflow, new return features in flows, the ability to use order data in Marketing Cloud, and B2C Commerce self-service tools.

# B2B2C Commerce (Generally Available)

Leverage and extend the Lightning platform's functionality with the B2B2C Commerce license to build self-service stores for your shoppers. B2B2C Commerce is built natively on the Salesforce platform. When you configure your B2B2C Commerce solution, you can rely on the trusted power, security, and scalability of all the standard Salesforce platform technologies. B2B2C Commerce and B2B Commerce share the Salesforce Commerce data model, search, recommendations, guided storefront setup experience, shared base components, and partner ecosystem. All of which provide you with a consistent experience for building an end-to-end D2C B2C storefront. For a fun introduction to B2B2C Commerce, check out the Sell Direct to Consumers with Salesforce B2B2C Commerce video.

Where: This feature is new in Lightning Experience and available in Enterprise and Developer editions.

When: You can enable B2B2C Commerce in Lightning Experience, Enterprise, and Developer edition orgs starting on June 15, 2021.

**Who:** This feature is available to users with a Salesforce B2B2C Commerce license.

Why: With B2B2C Commerce:

- Commerce admins can access Commerce objects in Salesforce.
- Commerce admins and merchandisers can use the Commerce app to manage store content, entitlements, and price books.
- Commerce admins can make products discoverable for shoppers using Search.
- Commerce admins and merchandisers can easily create a store with Experience Builder built-in functionality, using the B2C storefront template and no-code page editing.
- Commerce admins can efficiently import products into catalogs using the configured Data Import CSV file.
- Commerce admins can import managed orders that are integrated with Salesforce Order Management capabilities, including payment capture, cancelations, simple returns, and simple fulfillment.
- Independent software vendors (ISVs) can explore a rich ecosystem of system integration partners and payment, tax, and shipping integrations.

## IN THIS SECTION:

#### **Unify Your Commerce Operations**

Grow your business with a single global platform and a unified data model for B2B2C, B2B, order management, and an ecosystem of partners. With B2B2C Commerce built on the Salesforce platform, you get a single view of shoppers throughout the order lifecycle.

## Quickly Launch Full-Featured Stores with B2B2C Commerce

Get commerce sites up and running quickly with low-code setup and customization, simplified data import, and shared workflows across clouds.

# Create Personalized Shopping Experiences with Artificial Intelligence

Help shoppers find the products they came on your site for and discover additional ones to purchase with drag and drop Commerce Einstein Recommendations and Search. Connect and manage customer data across your entire organization and deliver personalized experiences powered by Artificial Intelligence.

#### Connect Your Customer's Journey from Marketing to Sales

Take the fastest path to complete digital transformation with a CRM-powered, connected customer journey from Salesforce Marketing to Sales to Commerce to Service with a complete ecosystem. Explore a rich ecosystem of AppExchange payment, tax, and shipping integrations and system integrator partners to accelerate your business and reduce implementation costs.

# **Unify Your Commerce Operations**

Grow your business with a single global platform and a unified data model for B2B2C, B2B, order management, and an ecosystem of partners. With B2B2C Commerce built on the Salesforce platform, you get a single view of shoppers throughout the order lifecycle.

Where: This feature is new in Lightning Experience and available in Enterprise and Developer editions.

Who: This feature is available to users with a B2B2C Commerce license.

**Why:** Build rich, integrated Commerce experiences using standard Commerce objects and components across B2B2C, B2B, and order management on the platform you already use for Sales and Service.

Commerce admins and merchandisers can use the shared Commerce app to manage store catalog content, products, and price books for B2B2C and B2B use cases.

SEE ALSO:

Salesforce Help: Salesforce B2B2C Commerce (can be outdated or unavailable during release preview)

# Quickly Launch Full-Featured Stores with B2B2C Commerce

Get commerce sites up and running quickly with low-code setup and customization, simplified data import, and shared workflows across clouds.

Where: This feature is new in Lightning Experience and available in Enterprise and Developer editions.

Who: This feature is available to users with a B2B2C Commerce license.

**Why:** Use the B2C storefront template and Experience Builder to create a branded, full-featured Commerce Experience with clicks, not code. Commerce admins can quickly import both B2B and B2B2C product and catalog data with the Data Import CSV file that eases creating and updating key object relationships between products, categories, price books, and entitlement policies.

SEE ALSO:

Salesforce Help: Salesforce B2B2C Commerce (can be outdated or unavailable during release preview)

# Create Personalized Shopping Experiences with Artificial Intelligence

Help shoppers find the products they came on your site for and discover additional ones to purchase with drag and drop Commerce Einstein Recommendations and Search. Connect and manage customer data across your entire organization and deliver personalized experiences powered by Artificial Intelligence.

Where: This feature is new in Lightning Experience and available in Enterprise and Developer editions.

Who: This feature is available to users with a B2B2C Commerce license.

Why: With Search, you:

- Mark products as searchable or not searchable
- Make product fields searchable
- Add filters
- Define display settings for search results and category pages

With Recommendations, you get:

- Activity tracking with no implementation required
- Recommendations for common use cases—similar products, complementary products, and recently viewed

- Header text definitions for the recommendations
- Control of the number of products to recommend
- Control of the number of products that must be recommended to be visible to shoppers

#### SEE ALSO:

Salesforce Help: Salesforce B2B2C Commerce (can be outdated or unavailable during release preview)

# Connect Your Customer's Journey from Marketing to Sales

Take the fastest path to complete digital transformation with a CRM-powered, connected customer journey from Salesforce Marketing to Sales to Commerce to Service with a complete ecosystem. Explore a rich ecosystem of AppExchange payment, tax, and shipping integrations and system integrator partners to accelerate your business and reduce implementation costs.

Where: This feature is new in Lightning Experience and available in Enterprise and Developer editions.

**Who:** This feature is available to users with a B2B2C Commerce license.

SEE ALSO:

Salesforce Help: Salesforce B2B2C Commerce (can be outdated or unavailable during release preview)

# **B2B** Commerce for Lightning

Enable B2B Commerce to access the Commerce app, objects, and workspaces. Store managers can customize their hybrid lists to make it easier for them to manage their products. Einstein search suggestions make it easier for customers to find the products that they're looking for. And that's not all.

## IN THIS SECTION:

#### The Commerce App

Enable B2B Commerce to use the Commerce app and objects, customize product hybrid lists, and automatically get a product list for every store. View, manage, and sort Orders with the Order List component. Add more products to your store's catalog and make it easier for quests to browse the store.

## **B2B Commerce Search**

Get Einstein search suggestions, sort product search results, load prices separately, and eliminate the redirect when there are no product search results.

# B2B Commerce Checkout and Integrations

Choose to automatically create managed or unmanaged order types directly from your Checkout Flow. Use the new Payment component to tokenize your payments and create a flexible payment structure.

## Other Changes

Learn about smaller changes that improve B2B Commerce for Lightning.

# The Commerce App

Enable B2B Commerce to use the Commerce app and objects, customize product hybrid lists, and automatically get a product list for every store. View, manage, and sort Orders with the Order List component. Add more products to your store's catalog and make it easier for guests to browse the store.

## IN THIS SECTION:

## Enable Commerce to use the Commerce App and Commerce Objects

Design, build, and launch business-to-business (B2B) and business-to-consumer (B2C) commerce solutions that enable retailers, wholesalers, or distributors to purchase goods or services from your brand. Select Enable Commerce to turn on access to the Commerce app and commerce objects.

## Add More Products to Your Store and Catalogs

In your B2B store, add up to 1 million products—up from 350,000. The same increase applies to your catalogs—add up to 1 million products. Make more inventory available to your buyers.

## Product Variation Grouping Is Generally Available (GA)

Now in search results you can choose whether to show all of a product's variations or just the parent product with a link to its variations.

## Customize Your Hybrid Lists in the Product Workspace

Create, update, and save product hybrid lists with the information that you need. You can select which columns to show, add filters, and save the list under the name that makes the most sense for you.

#### Get a Product Hybrid List for Every Store

Easily see which products are associated with each of your stores. Product hybrid lists are automatically created for stores. Select your store list from the dropdown menu in the Product workspace to manage inventory store by store.

## Skip Setting Up Product Sharing Rules for Guest Browsers

Getting guest browsing set up for your store just got easier because you no longer set up product sharing rules.

## Review and Reorder with Order List Component

Now your users can see all their past orders with the Order List Component. They can filter and sort them based on order date, see more details, or even reorder. And you can hide actions, modify display labels, and choose which fields to display. This component replaces the Order Summary History component.

# Update Order Menu Item to Use Order List Component

You now can use the Order List component in the Order menu item of your Customizable User Profile Menu. There's just a bit of updating to do to help users get to the Order List page. This change only applies to existing orgs that want to use the new component. If you have a new org or aren't updating the component, no action is needed.

# Delegate Order and Shipment Work with User Permissions

Integrating your order and shipment processes with third-party tools can be a great time-saver, but a real headache if everyone can access them. Two user permissions take care of that: Commerce Integrator and Commerce Shipment User let you determine who can access these processes.

## Use Person Accounts as Buyer Accounts

You can now include person accounts and standard accounts in your store records. Most accounts are businesses and people are contacts, but that's not always true for stores. Previously, it wasn't easy to show when a person buys directly and is the account.

# Get Better Performance with Changes to BuyerGroup and BuyerGroupMember Associations

To increase performance and scale, the relationship between BuyerGroup and BuyerGroupMember objects is updated. With the update, users with access to a buyer group no longer have access to buyer group members. To fix the access, you can grant the view all or modify all permissions to users. The update changes sharing rules and rollup summary fields also.

# Turn on Pre-Configured Permission Sets for B2B Commerce

Save time when granting users access to the Commerce app and objects. Permission sets for buyers and buyer managers are now built into Commerce. You can turn on the access you need in one click.

# Enable Commerce to use the Commerce App and Commerce Objects

Design, build, and launch business-to-business (B2B) and business-to-consumer (B2C) commerce solutions that enable retailers, wholesalers, or distributors to purchase goods or services from your brand. Select Enable Commerce to turn on access to the Commerce app and commerce objects.

**Where:** This change applies to Experience Builder sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change applies to users with a B2C Commerce license or B2B Commerce license.

**How:** From Setup, enter *Commerce* in the Quick Find Box, then select **Commerce** > **Settings**. Select **Enable Commerce**. Then, click **Launch Commerce**.

# Add More Products to Your Store and Catalogs

In your B2B store, add up to 1 million products—up from 350,000. The same increase applies to your catalogs—add up to 1 million products. Make more inventory available to your buyers.

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

**Why:** Always be strategic in the products that you add to your store. Higher product counts can slow performance when buyers run a search or you rebuild your store's search index.

# Product Variation Grouping Is Generally Available (GA)

Now in search results you can choose whether to show all of a product's variations or just the parent product with a link to its variations.

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

**How:** To get product variation grouping, you adjust a setting under search settings and change some properties on the Results Layout component.



**Note**: When you have an org created before Summer '21, you must explicitly enable product variation grouping and then rebuild your search index.

#### SEE ALSO:

Salesforce Help: Product Variation Grouping (can be outdated or unavailable during release preview)

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

Salesforce Help: Build or Rebuild the Search Index (can be outdated or unavailable during release preview)

# Customize Your Hybrid Lists in the Product Workspace

Create, update, and save product hybrid lists with the information that you need. You can select which columns to show, add filters, and save the list under the name that makes the most sense for you.

**Where:** This change applies to Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This change applies to users with a B2B Commerce license.

# Get a Product Hybrid List for Every Store

Easily see which products are associated with each of your stores. Product hybrid lists are automatically created for stores. Select your store list from the dropdown menu in the Product workspace to manage inventory store by store.

**Where:** This change applies to Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This change applies to users with a B2B Commerce license.

# Skip Setting Up Product Sharing Rules for Guest Browsers

Getting guest browsing set up for your store just got easier because you no longer set up product sharing rules.

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

# Review and Reorder with Order List Component

Now your users can see all their past orders with the Order List Component. They can filter and sort them based on order date, see more details, or even reorder. And you can hide actions, modify display labels, and choose which fields to display. This component replaces the Order Summary History component.

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

# Update Order Menu Item to Use Order List Component

You now can use the Order List component in the Order menu item of your Customizable User Profile Menu. There's just a bit of updating to do to help users get to the Order List page. This change only applies to existing orgs that want to use the new component. If you have a new org or aren't updating the component, no action is needed.

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

**How:** In your Customizable User Profile Menu component, open the Order menu item. Update the site page to Order Summary List and the URL to OrderSummary/OrderSummary/Default.

# Delegate Order and Shipment Work with User Permissions

Integrating your order and shipment processes with third-party tools can be a great time-saver, but a real headache if everyone can access them. Two user permissions take care of that: Commerce Integrator and Commerce Shipment User let you determine who can access these processes.

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

**Why:** Users with the Commerce Integrator permission can process integrations and export and import orders from external order management systems. The Commerce Shipment User permission gives users access to shipment management systems. Their level of access is the same as their access to order summaries. For example, if they have read access to order summaries, they have read access to shipments.

# Use Person Accounts as Buyer Accounts

You can now include person accounts and standard accounts in your store records. Most accounts are businesses and people are contacts, but that's not always true for stores. Previously, it wasn't easy to show when a person buys directly and is the account.

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

# Get Better Performance with Changes to BuyerGroup and BuyerGroupMember Associations

To increase performance and scale, the relationship between BuyerGroup and BuyerGroupMember objects is updated. With the update, users with access to a buyer group no longer have access to buyer group members. To fix the access, you can grant the view all or modify all permissions to users. The update changes sharing rules and rollup summary fields also.

Where: This feature is available in the Lightning B2B Commerce Template, in Personal, Enterprise, Performance, and Developer editions.

**Why:** In addition to the improvements, this change impacts sharing rules. Sharing rules created on a buyer group aren't automatically granted to a buyer group member. Also, an owner field was added to the BuyerGroupMember object, and fields on the BuyerGroup object aren't available to configure flows. Validate the BuyerGroupMember approval flows and workflows to make sure that they work the way you want. And, rollup summary fields on buyer groups from buyer group members are no longer supported.

**How:** If you or your users log in and don't see what you expect, update the permissions. The View All permission lets users view buyer group members added by others, and the Modify All permission lets users remove buyer group members added by others.

To make sure sharing rules work the way you want, create any sharing rules that you created for a Buyer Group for the Buyer Group Member as well. Validate the approval flows and work flows for Buyer Group Member in a sandbox org.

Remove any Roll-Up Summary fields on Buyer Group from Buyer Group Member.

# Turn on Pre-Configured Permission Sets for B2B Commerce

Save time when granting users access to the Commerce app and objects. Permission sets for buyers and buyer managers are now built into Commerce. You can turn on the access you need in one click.

**Where:** This change applies to Experience Builder sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change applies to users with a B2C Commerce license or B2B Commerce license.

**How:** From Setup, enter *Permission Sets* in the Quick Find Box, then select **Permission Sets**. Select one of the available Commerce permission sets.

# **B2B Commerce Search**

Get Einstein search suggestions, sort product search results, load prices separately, and eliminate the redirect when there are no product search results.

#### IN THIS SECTION:

## Einstein Search Suggestions Is Generally Available (GA)

In your B2B store, Einstein powers personalized product search suggestions for authenticated and guest buyers. Help your buyers find the right product fast.

# Eliminate the Redirect When No Product Search Results Are Returned

When a product search yields no results in your B2B store, you can redirect buyers to a No Search Results page. If you prefer to skip the redirect, you can now create a no-results experience right on the Search Results page.

## Sort Product Search Results

Give buyers the option to sort their product search results by best match, name ascending or descending, or product SKU ascending or descending. Use new properties on the Results Layout component to enable search results sorting.

# Load Product Search Results and Prices Separately

In B2B stores, decoupled product prices and product search results means that each loads independently. Buyers get faster load times and improved page performance.

#### Get Faster Search Results

By default, user entitlement checks are run as part of a search index rebuild and again when product search results are returned. Get faster search performance by skipping the second check.

# Einstein Search Suggestions Is Generally Available (GA)

In your B2B store, Einstein powers personalized product search suggestions for authenticated and guest buyers. Help your buyers find the right product fast.

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

**Why:** With search suggestions, buyers see relevant search terms even before they finish entering their own. Relevance is based on a buyer's recent search history. Suggestions appear at two points, when buyers click in the Search field and when they start entering their terms.

**How:** In Experience Builder, select the Product Search component. In the property editor, check **Show search suggestions**.

Connect REST API and Connect in Apex support search suggestions.

## Eliminate the Redirect When No Product Search Results Are Returned

When a product search yields no results in your B2B store, you can redirect buyers to a No Search Results page. If you prefer to skip the redirect, you can now create a no-results experience right on the Search Results page.

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

**How:** To keep your no-results message on the Search Results page, open Experience Builder and configure a property on the Results Layout component. A simple editor is available for entering your own HTML and no-results message.

SEE ALSO:

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

# Sort Product Search Results

Give buyers the option to sort their product search results by best match, name ascending or descending, or product SKU ascending or descending. Use new properties on the Results Layout component to enable search results sorting.

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

Connect REST API and Connect in Apex support sorting product search results.

**How:** If you're using custom styles for the default Search component, review, test, and modify your customizations in Sandbox.

SEE ALSO:

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

# Load Product Search Results and Prices Separately

In B2B stores, decoupled product prices and product search results means that each loads independently. Buyers get faster load times and improved page performance.

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

**How:** Decoupling results and prices enables incremental loading of the search page, which reduces page load times. If there's a lag between when a product loads and when its price loads, the placeholder text "Price loading..." appears.

# **Get Faster Search Results**

By default, user entitlement checks are run as part of a search index rebuild and again when product search results are returned. Get faster search performance by skipping the second check.

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

How: In your store's Search settings, open the Results Display Settings tab, and select **Skip additional entitlement check for search**.

# **B2B Commerce Checkout and Integrations**

Choose to automatically create managed or unmanaged order types directly from your Checkout Flow. Use the new Payment component to tokenize your payments and create a flexible payment structure.

#### IN THIS SECTION:

#### Create Unmanaged and Managed Orders from Checkout

Do you ever wish order creation was more flexible? Search no further than the Checkout Flow. Decide which order type works best with your system and skip the manual process of converting orders after they're already created. Change the default order type from managed to unmanaged from within your Activate Order action to automatically assign a type at order creation.

## Use Payment Tokens with the New Checkout Payment Component

Use payment tokenization to capture customer information early in the checkout process. With a payment token you can collect payment information, convert it into a token, and pass it through your checkout process without storing sensitive payment details. The new Payment component in the Checkout Flow has tokenization built in, providing flexibility as a default.

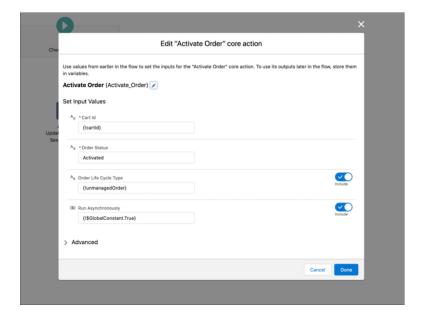
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Do you ever wish order creation was more flexible? Search no further than the Checkout Flow. Decide which order type works best with your system and skip the manual process of converting orders after they're already created. Change the default order type from managed to unmanaged from within your Activate Order action to automatically assign a type at order creation.

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

Who: You need a B2B Commerce license to access the Checkout Flow.

**How:** To choose whether your orders are managed or unmanaged, navigate to your Checkout Flow and select the Activate Order subflow. Open the Activate Order action and find the Order Life Cycle Type input field. Enter {!unmanagedOrder} for unmanaged orders and {!managedOrder} for managed orders.



# Use Payment Tokens with the New Checkout Payment Component

Use payment tokenization to capture customer information early in the checkout process. With a payment token you can collect payment information, convert it into a token, and pass it through your checkout process without storing sensitive payment details. The new Payment component in the Checkout Flow has tokenization built in, providing flexibility as a default.

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

Who: You need a B2B Commerce license to access the Checkout Flow.

**How:** Add the Payment component to your Checkout Flow to use tokenization and allow customers to pay with a purchase order or credit card.



# Other Changes

Learn about smaller changes that improve B2B Commerce for Lightning.

## IN THIS SECTION:

## Set Up Product Increment, Minimum, and Maximum Quantity Rules

Set up quantity rules for product purchases. Let buyers know the smallest and largest amount of a product that they can buy and the quantity of product that's added with each increase. Rule violations trigger an error on the spot, so the buyer's directly informed.

# Order Summary History Component Is Being Deprecated

The new Order List component now replaces the Order Summary component. The new component allows for filter and sorting based on order date plus gives you more granular control over what users see.

# Set Up Product Increment, Minimum, and Maximum Quantity Rules

Set up quantity rules for product purchases. Let buyers know the smallest and largest amount of a product that they can buy and the quantity of product that's added with each increase. Rule violations trigger an error on the spot, so the buyer's directly informed.

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

**How:** Set up increment, minimum, and maximum rules in the Product Workspace. Then configure display properties on the Cart, Product Detail Card, and Results Layout components in Experience Builder.

Connect REST API and Connect in Apex support quantity rules.

If you're already using the default quantity selector, update the existing CSS class to change it to the new quantity selector. Review your changes in Sandbox before finalizing.

#### SEE ALSO:

Salesforce Help: Use the Product Workspace to Manage and Update Products (can be outdated or unavailable during release preview)

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

Salesforce Help: Product Detail Card (can be outdated or unavailable during release preview)

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

# Order Summary History Component Is Being Deprecated

The new Order List component now replaces the Order Summary component. The new component allows for filter and sorting based on order date plus gives you more granular control over what users see.

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

# **Omnichannel Inventory**

Enhancements to Omnichannel Inventory include an updated flow core action.

#### IN THIS SECTION:

Omnichannel Inventory Flow Core Actions

Omnichannel Inventory provides an updated flow core action for use in flows.

# **Omnichannel Inventory Flow Core Actions**

Omnichannel Inventory provides an updated flow core action 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 an Omnichannel Inventory license.

The following Omnichannel Inventory action has been updated:

#### **Omnichannel Inventory Service Transfer Reservation**

Use a new option to force a transfer even when the destination location doesn't have enough available inventory.

# Salesforce Order Management

Salesforce Order Management adds a new Return Management Authorization workflow, new return features in flows, the ability to use order data in Marketing Cloud, and B2C Commerce self-service tools.

#### IN THIS SECTION:

## Manage Returns with the Return Merchandise Authorization Workflow

Get visibility into the lifecycle of an item being returned by a shopper, from initiation of a return request to the physical receipt of returned items and on through to refund processing.

# Use New Order Management Return Features in Flows

Salesforce Order Management provides new flow core actions for use in flows.

## Use Order Data in Marketing Cloud

Use Salesforce Order Management customer data to trigger post-order actions and deliver targeted marketing messages in Marketing Cloud.

## **Empower Shoppers with Self-Service Tools**

Give shoppers real-time views of order information so that they can track and manage their orders.

# Manage Returns with the Return Merchandise Authorization Workflow

Get visibility into the lifecycle of an item being returned by a shopper, from initiation of a return request to the physical receipt of returned items and on through to refund processing.

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 a Salesforce Order Management Growth or Plus license.

# Why:

Digital selling channels provide shoppers with multiple ways to initiate returns for items that they purchased online. The new return merchandise authorization (RMA) workflow makes it easy for a Service Agent or Operations Manager to generate a return order for a shopper and for warehouse staff to close and complete return orders when returned items are received.

When you create a return order using the RMA workflow, the Order Summary tracks the state of the return order from start to finish. When you receive returned items and complete the return order, Order Management:

- Creates a change order.
- Generates a credit memo and initiates a refund.
- Updates the financial information on the Order Summary and associated objects.
- Updates the order item quantities on the Order Summary and associated objects.

#### How:

To use the new RMA workflow, clone and activate the RMA Return Items Flow and the RMA Create Invoice and Ensure Refunds Flow. Then add the RMA Return Items Flow to the Actions & Recommendations component on the Order Summary FlexiPage.

Existing customers must also reclone and activate the Create Process Exception Flow.

## SEE ALSO:

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

# Use New Order Management Return 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 with the Returns feature.

**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 Return Order**

Create a return order and return order items for items belonging to an order summary.

#### **Return Return Order Items**

Process return order items belonging to a return order.

# Use Order Data in Marketing Cloud

Use Salesforce Order Management customer data to trigger post-order actions and deliver targeted marketing messages in Marketing Cloud.

**Who:** This feature requires a Salesforce Order Management license and is available to Marketing Cloud Connect and Journey Builder customers with the Integrations package enabled.

**Why:** Salesforce Order Management data and actions are now available in Marketing Cloud through a native integration using Marketing Cloud Connect.

This integration lets you do more with your customer data. Send any action from Salesforce Order Management directly to Marketing Cloud to trigger post-order transaction emails, such as shipping notifications and cancellation confirmations, or use shopper data to build targeted marketing campaigns.

#### SEE ALSO:

Marketing Cloud Release Notes: Marketing Cloud Connect API v51 Upgrade (can be outdated or unavailable during release preview)

Salesforce Help: Marketing Cloud Connect (can be outdated or unavailable during release preview)

# **Empower Shoppers with Self-Service Tools**

Give shoppers real-time views of order information so that they can track and manage their orders.

Who: This feature is available to users with a Salesforce Order Management license and a B2C Commerce License.

**Why:** The new Storefront Reference Architecture (SFRA) Order Management cartridge lets you deliver shopper self-service capabilities to any B2C Commerce SFRA website by connecting shoppers to their order history in Salesforce Order Management.

Shoppers can see real-time order information, including order history and order status. They can also initiate post-order servicing requests, such as cancellations and returns, without engaging a service agent.

**How:** To use this feature, you must:

- Install and configure the SFRA Self-Service module in your B2C environment.
- Enable B2C Self-Service in Salesforce Order Management Setup and establish a trust connection to let B2C Commerce get order data from Salesforce Order Management.

# Customization

Easily see why a user or group has the record access they do, right in Lightning Experience. See new locales and up-to-date locale formats throughout Salesforce. And, enhancements to External Services give you access to a larger selection of publicly available APIs.

## IN THIS SECTION:

## Sharing

See why a user has access to a record in Lightning Experience, and choose whether to include records owned by high-volume community or site users in guest user sharing rules.

#### Globalization

New locales and platform-only languages are available in Salesforce. We updated existing locales to the latest formats, and you can enable the new locale format standard via a release update.

#### **External Services**

Use a larger selection of publicly available APIs such as Slack or Okta thanks to new support for larger spec sizes and more support for schema constructs and use cases. Use the External Services wizard to individually pick which API operations defined in your schema get registered with your external service.

# Lightning App Builder

Get a more accurate readout of your record page's performance from the Performance Analysis tool, which now includes custom components in its assessment. A fix to how visibility rules are handled during edit, create, and clone helps make your users more efficient while working on record pages.

#### **Fields**

Protect your Salesforce org's overall health with new inactive picklist options. A new limit on custom fields per object allows you to install additional fields from AppExchange.

#### Einstein Recommendation Builder

Build recommendations faster and smarter with Einstein Recommendation Builder. You can build a custom recommendation or use a template. The Parts to Work Orders template lets you build field service recommendations quickly.

## **Profiles and Permissions**

Working with permissions keeps getting better and more flexible with user assignments that expire. And the Read Only standard profile is converted to a custom profile now.

## AppExchange

Salesforce now collects US sales tax for one-time and recurring AppExchange purchases. To determine if your purchase is taxable, we use your shipping address and tax-exempt status.

#### General Setup

Define CRUD permissions to control which users can access background operations and get improved field-level access and sharing rules. The Secure Agent feature is being retired in Winter '22.

# Sharing

See why a user has access to a record in Lightning Experience, and choose whether to include records owned by high-volume community or site users in guest user sharing rules.

#### IN THIS SECTION:

## See Record Access Reasons in Lightning Experience

A user has access to a record, but why? Is it because of their role? Their territory? From a sharing rule? Now you can see why a user has the access they do, right from Record Sharing Hierarchy in Lightning Experience. Previously, you switched to Salesforce Classic to see this information. Sharing Hierarchy is now available on the action menu, not just in the Share window.

# Share Records Owned by High-Volume Users with Unauthenticated Guest Users

Select whether to include records owned by high-volume community or site users when you create guest user sharing rules. By default, guest user sharing rules include only records that match the rule's criteria and are owned by authenticated users, guest users, and queues. Because of recent security improvements, this setting is the only way to grant guest users access to records owned by high-volume users. This option isn't available for owner-based or criteria-based sharing rules.

## Control Access to Sensitive Data with Restriction Rules (Beta)

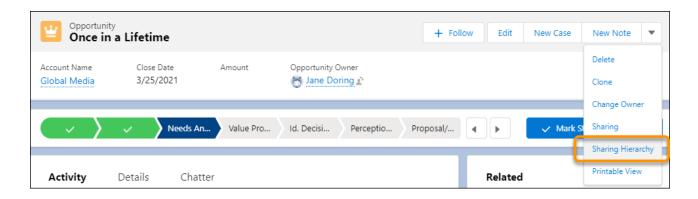
Secure your data and boost productivity by permitting your users to see only the records necessary for their job function. Create restriction rules to control which subset of records you allow specified groups of users to see. Restriction rules are available for custom objects, contracts, tasks, and events. You can create and manage restriction rules via the Tooling and Metadata APIs. They provide another layer of access control on top of your existing sharing settings and let you configure truly private visibility.

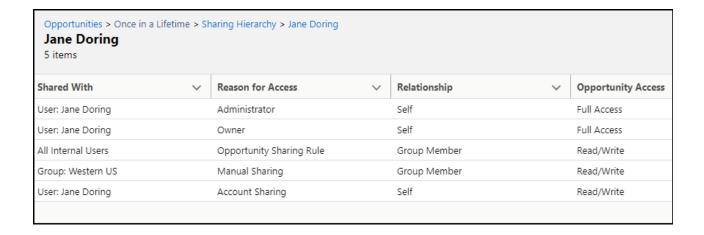
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A user has access to a record, but why? Is it because of their role? Their territory? From a sharing rule? Now you can see why a user has the access they do, right from Record Sharing Hierarchy in Lightning Experience. Previously, you switched to Salesforce Classic to see this information. Sharing Hierarchy is now available on the action menu, not just in the Share window.

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

**How:** Select Sharing Hierarchy from the action menu on the record. Click **View** next to a user's name. You see the record access the user has, and the reason for the access in the displayed table.







Note: Sharing Hierarchy is available only for accounts, opportunities, cases, contacts, leads, and custom objects.

SEE ALSO:

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

# Share Records Owned by High-Volume Users with Unauthenticated Guest Users

Select whether to include records owned by high-volume community or site users when you create guest user sharing rules. By default, guest user sharing rules include only records that match the rule's criteria and are owned by authenticated users, guest users, and queues. Because of recent security improvements, this setting is the only way to grant guest users access to records owned by high-volume users. This option isn't available for owner-based or criteria-based sharing rules.

**Where:** This change applies to all Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Grant Unauthenticated Guest Users Access to Records Owned by High-Volume Users

# Control Access to Sensitive Data with Restriction Rules (Beta)

Secure your data and boost productivity by permitting your users to see only the records necessary for their job function. Create restriction rules to control which subset of records you allow specified groups of users to see. Restriction rules are available for custom objects, contracts, tasks, and events. You can create and manage restriction rules via the Tooling and Metadata APIs. They provide another layer of access control on top of your existing sharing settings and let you configure truly private visibility.

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



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

When: The timeline for the rollout of this feature is published in the Restriction Rules group in the Trailblazer Community.

**Why:** Without restriction rules, users with access to an account can see its contracts, tasks, and events, even when the organization-wide default is set to Private. For custom objects, users can see all detail records. Restriction rules let you configure truly private access for these objects.

**How:** For information on enabling this feature, contact Salesforce. You can create and modify restriction rules using the Tooling or Metadata API. See the Restriction Rules Developer Guide (Beta) for more information.

SEE ALSO:

Restriction Rules Developer Guide (Beta): About This Guide (can be outdated or unavailable during release preview)

Salesforce Developers Blog: Control Access to Sensitive Records with Restriction Rules (Now in Beta)

IdeaExchange: Separate Contract Sharing Rules

IdeaExchange: Criteria Based Sharing rules: Allow Lookup/formula/dynamic values and user field (partially delivered)

IdeaExchange: Support for fully private (no read or write) activity sharing model.

# Globalization

New locales and platform-only languages are available in Salesforce. We updated existing locales to the latest formats, and you can enable the new locale format standard via a release update.

IN THIS SECTION:

Connect with Global Customers with New Languages and Locales

To help you do business all over the world, Chinese (Malaysia), Hawaiian, Haitian Creole, Kazakh, Samoan, and several Russian locales are now available as platform-only languages. Users can also select new locales related to these languages.

# Prepare for Locale Format Changes

To provide you with up-to-date formats, we updated the locale formats in Salesforce. Whether you use the International Components for Unicode (ICU) formats or Oracle's Java Development Kit (JDK) formats, we recommend that you evaluate how the format changes affect you. This release includes ICU 68.2, which uses Common Locale Data Repository (CLDR) version 38, and JDK version 11, which uses CDLR version 33.

## 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.

# The State and Country/Territory Picklists Setup Page Was Simplified

To make managing the state and country/territory picklists easier, we simplified the Setup page.

#### The Norfolk Island Standard Time Zone Was Renamed

The (GMT+11:00) Norfolk Island Time (Pacific/Norfolk) time zone was renamed to (GMT+11:00) Norfolk Island Standard Time (Pacific/Norfolk). This time zone is available when daylight saving time isn't in effect.

# Connect with Global Customers with New Languages and Locales

To help you do business all over the world, Chinese (Malaysia), Hawaiian, Haitian Creole, Kazakh, Samoan, and several Russian locales are now available as platform-only languages. Users can also select new locales related to these languages.

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

Why: Admins can enable these new platform-only languages.

- Chinese (Malaysia): zh MY
- Haitian Creole: ht
- Hawaiian: haw
- Kazakh: kk
- Russian (Armenia): ru AM
- Russian (Belarus): ru BY
- Russian (Kazakhstan): ru KZ
- Russian (Kyrgyzstan): ru KG
- Russian (Lithuania): ru LT
- Russian (Moldova): ru MD
- Russian (Poland): ru PL
- Russian (Ukraine): ru UA
- Samoan: sm

Users can select these new locales. The time, date, and currency formats vary based on whether you use the International Components for Unicode (ICU) or Oracle's Java Development Kit (JDK) locale formats.

- Chinese (Malaysia): zh MY
- Haitian Creole (Haiti): ht нт
- Haitian Creole (United States): ht US
- Hawaiian (United States): haw US
- Russian (Armenia): ru AM

Russian (Belarus): ru BY

Russian (Kyrgyzstan): ru\_KG

• Russian (Lithuania): ru LT

• Russian (Moldova): ru MD

Russian (Poland): ru PL

Russian (Ukraine): ru UA

• Samoan (Samoa): sm WS

• Samoan (United States): sm US

#### 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)

# **Prepare for Locale Format Changes**

To provide you with up-to-date formats, we updated the locale formats in Salesforce. Whether you use the International Components for Unicode (ICU) formats or Oracle's Java Development Kit (JDK) formats, we recommend that you evaluate how the format changes affect you. This release includes ICU 68.2, which uses Common Locale Data Repository (CLDR) version 38, and JDK version 11, which uses CDLR version 33.

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

**How:** Review the changes to date, time, number, and currency formats for the locales that you use in Salesforce and evaluate how they affect you. Then test your filters, code, and components as needed.

## SEE ALSO:

Knowledge Article: ICU Locale Format Changes in Summer '21

Knowledge Article: JDK Locale Format Changes in Summer '21

Knowledge Article: Determine Whether Your Salesforce Org Is Using ICU or JDK Locale Formats

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. 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 <code>User Interface</code>, then select <code>User Interface</code>. Select <code>Enable ICU</code> formats for <code>en\_CA</code> 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)

Knowledge Article: Determine Whether Your Salesforce Org Is Using ICU or JDK Locale Formats

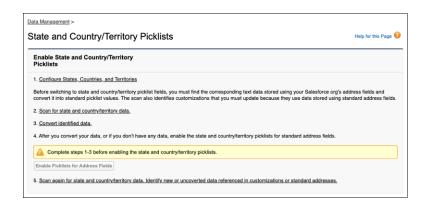
Release Update Announcements

# The State and Country/Territory Picklists Setup Page Was Simplified

To make managing the state and country/territory picklists easier, we simplified the Setup page.

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

**When:** The refreshed State and Country/Territory Picklists Setup page uses simplified links to provide the same functionality. When you click a step, the resulting page includes relevant instructions.



#### SEE ALSO:

Salesforce Help: Let Users Select State and Country from Picklists (can be outdated or unavailable during release preview)

# The Norfolk Island Standard Time Zone Was Renamed

The (GMT+11:00) Norfolk Island Time (Pacific/Norfolk) time zone was renamed to (GMT+11:00) Norfolk Island Standard Time (Pacific/Norfolk). This time zone is available when daylight saving time isn't in effect.

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

SEE ALSO:

Salesforce Help: Supported Time Zones (can be outdated or unavailable during release preview)

# **External Services**

Use a larger selection of publicly available APIs such as Slack or Okta thanks to new support for larger spec sizes and more support for schema constructs and use cases. Use the External Services wizard to individually pick which API operations defined in your schema get registered with your external service.

#### IN THIS SECTION:

#### Legacy External Services is Being Retired in Summer '21

It's replaced by the new version of External Services that adds a broader feature set than the legacy version, including support for larger and more complex schemas, and offers better error messaging and error recovery. Content related to the legacy External Services version has been removed from the Help documentation.

## Select Operations with the External Services Wizard

You can now select individual operations from a schema to include in your Salesforce external service. You can also exclude other operations that aren't supported by External Services. Previously, you included all operations defined in a schema.

## Register OpenAPI Specifications up to 1.5 MB in Size

We increased the maximum schema registration size again, this time from 100,000 characters to 1.5 million characters (1.5 MB).

## Use the allOf OpenAPI 2.0 Schema Construct

You can now register schemas that use allof. In an Open API spec, you can combine and extend model definitions using the allof property. allof takes in an array of object definitions that are validated independently, but together compose a single object.

## Use the additional Properties OpenAPI 2.0 Schema Construct

More schema constructs anyone? How about a little additionalProperties? Work with objects that have dictionary, map, or associative array properties. In OpenAPI 2.0, the named properties are accessible as Apex properties with matching property type. additionalProperties allow for free form map or dictionary properties with a common property value type that are accessible in Apex as a Map property.

## Apex Object Names Can Now Be Up To 255 Characters Long

Apex object names now support a maximum of 255 characters, up from 40 characters. This support depends on specifications featuring complex operations, and data structures with lengthy properties or elements. Previously, Apex object names could only be as long as 40 characters.

## Specify MIME Types

In an External Services schema, use consumes/produces media type directives to specify the MIME types understood by your API.

## Apex Unit Testing With Flow And External Services

You can now perform Apex unit testing with Flow and External Services.

## Use External Services for MuleSoft to Generate Actions in Flow Builder (Pilot)

Import your MuleSoft Anypoint Platform APIs in a few clicks with the External Services for MuleSoft wizard. Select your MuleSoft Name Credentials and let Salesforce do the heavy lifting of importing your endpoints and converting them into actions immediately available in Flow Builder.

# Legacy External Services is Being Retired in Summer '21

It's replaced by the new version of External Services that adds a broader feature set than the legacy version, including support for larger and more complex schemas, and offers better error messaging and error recovery. Content related to the legacy External Services version has been removed from the Help documentation.

**Where:** This change applies to orgs with the legacy External Services version in Lightning Experience, Enterprise, Performance, Unlimited, and Developer editions.

**How:** If you still have legacy registrations, they're visible in the list from now until Winter '22. You can delete them. You can't do anything else with your legacy External Services registrations, including editing them, recreating them, or using legacy registrations in a flow.

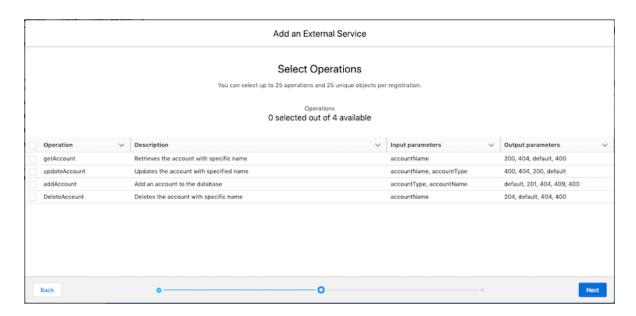
# Select Operations with the External Services Wizard

You can now select individual operations from a schema to include in your Salesforce external service. You can also exclude other operations that aren't supported by External Services. Previously, you included all operations defined in a schema.

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

#### How:

After you complete the first screen of the **Add an External Service** wizard and imported a valid schema, use the second screen, **Select Operations**, to select operations.



The operations you select import into your External Services registration and are available in Salesforce as External Service actions.

After you register your new external service, create a flow by searching the main Actions chooser for your action that was automatically generated by your External Services registration.

SEE ALSO:

Salesforce Help: Register an External Service

# Register OpenAPI Specifications up to 1.5 MB in Size

We increased the maximum schema registration size again, this time from 100,000 characters to 1.5 million characters (1.5 MB).

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

How: You can now register many more services than the previous limit allowed.

SEE ALSO:

Salesforce Help: External Services Considerations

# Use the allOf OpenAPI 2.0 Schema Construct

You can now register schemas that use allof. In an Open API spec, you can combine and extend model definitions using the allof property. allof takes in an array of object definitions that are validated independently, but together compose a single object.

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

**How:** For allof, the schema object property discriminator is ignored. The discriminator property determines the schema referenced by its type name. The discriminator property must be set in your flow to the appropriate schema property name. Only properties from the base schema are accessible, not the composition properties from the schema designated by the discriminator schema type value. For an example of allof in action, see "External Services Schema Example 9" section of Examples: External Services Schema.

We are working on it: The OpenAPI 2.0 parser ignores allof for object property types. As a workaround, define a named top-level schema object under definitions with the allof declaration. Reference the named schema object from your property.

SEE ALSO:

External Link: OpenAPI Specification
Salesforce Help: External Services Considerations

# Use the additional Properties OpenAPI 2.0 Schema Construct

More schema constructs anyone? How about a little additionalProperties? Work with objects that have dictionary, map, or associative array properties. In OpenAPI 2.0, the named properties are accessible as Apex properties with matching property type. additionalProperties allow for free form map or dictionary properties with a common property value type that are accessible in Apex as a Map property.

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

**How:** properties and additionalProperties under an OpenAPI 2.0 schema directive show as formal object properties and as a dictionary property. If declared under a property or additional property type, then the OpenAPI 2.0 parser ignores one or the other. The registration process doesn't throw an error. For an example of properties and additionalProperties in action, see "External Services Schema Example 9" section of Examples: External Services Schema.

Considerations for this new support include:

- OpenAPI 2.0 named properties are Apex object properties with the same name and matching property type.
- OpenAPI 2.0 additionalProperties are grouped in the Apex property with name properties and type Map<String, Type>, where Type is the declared additional properties type.
- Even if it could be declared as a standalone Apex Map type, OpenAPI 2.0 additionalProperties are always declared as an Apex object map property. The result is consistently handled named object properties defined together with additional properties.
- OpenAPI 2.0 properties and additional Properties can both be declared under an OpenAPI parameter schema or schema in the definitions section. If declared as an object property type, the OpenAPI 2.0 parser ignores either properties or additional Properties. An object property type must only define named properties or additional properties, but not both. To work around, place the object property definition as a named schema under definitions and reference it by name.
- The OpenAPI 2.0 parser doesn't differentiate between literal declarations or untyped schemas. Declarations like additionalProperties: true, additionalProperties: false, or additionalProperties: {} are interpreted as untyped. Untyped additional properties are ignored. There isn't a workaround to define additional properties that can be of any type.
- Flow doesn't allow access or manipulation of Apex object types with Map properties, but it transparently preserves the content when assigned to variables of the same Apex object type. To manipulate map data structure in flow, call an Apex invocable action that can access the map data structure. For an example with External Service maps in action, see the "External Services Schema Example 9" section of Examples: External Services Schema.

SEE ALSO:

Salesforce Help: External Services Considerations

# Apex Object Names Can Now Be Up To 255 Characters Long

Apex object names now support a maximum of 255 characters, up from 40 characters. This support depends on specifications featuring complex operations, and data structures with lengthy properties or elements. Previously, Apex object names could only be as long as 40 characters.

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

**How:** Limitations to this new support include:

• The operation or object developer name is derived from the registered schema. The name must fit within a maximum of 80 characters. If the individual objects or operations in the nested data structure don't themselves exceed 80 characters, then nested data structures can go up to 255 characters.

SEE ALSO:

Salesforce Help: External Services Considerations

# Specify MIME Types

In an External Services schema, use consumes/produces media type directives to specify the MIME types understood by your API.

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

**How:** The server directives consumes/produces are applied to all operations unless they're overridden by an operation's consumes/produces directive.

Considerations for this new support include:

• Unsupported consumes/produces directives invalidate the schema registration.

- consumes/produces directives that are incompatible with a request body or response entity schema declaration cause errors during callout.
- Missing consumes/produces directives are defaulted to:
  - application/json—if the request body or the response body schema is either an object or an array
  - text/plain—if the request or response schema body is a primitive type such as a string or an integer number
- If no request body parameter is defined for methods POST, PUT, and PATCH, form data request parameters are sent in the request body as application/x-www-form-urlencoded.

#### SEE ALSO:

External Link: MIME Types

Salesforce Help: External Services Considerations

# Apex Unit Testing With Flow And External Services

You can now perform Apex unit testing with Flow and External Services.

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

**Why:** You can use the same mock implementation for Apex HTTP callouts, but also use them in the context of flow tests. Previously, flows with external services or invocable actions with External Services couldn't be Apex unit tested.

How: For examples of Apex unit testing with External Services, see

- Testing External Service Actions in Flow
- "External Services Schema Example 9" section of Examples: External Services Schema

# Use External Services for MuleSoft to Generate Actions in Flow Builder (Pilot)

Import your MuleSoft Anypoint Platform APIs in a few clicks with the External Services for MuleSoft wizard. Select your MuleSoft Name Credentials and let Salesforce do the heavy lifting of importing your endpoints and converting them into actions immediately available in Flow Builder.

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



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk. You can provide feedback and suggestions for the External Services for MuleSoft wizard in the Trailblazer Community.

Who: To use the External Services for MuleSoft wizard, you need a valid MuleSoft license or demo account.

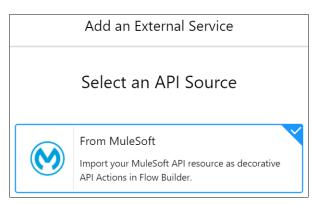
**Why:** Previously, you manually exported your Open API 2.0 specifications from MuleSoft and imported them into an external service. This export process could potentially lead to validation errors when you created the actions in Salesforce. With this enhancement, Salesforce automatically gets the list of APIs available to your MuleSoft account across all your environments.

**How:** You can select the API to use in Flow Builder and associate a name, a description, and a named credential for each API. Every endpoint is then converted into an action within your organization and immediately available in Flow Builder.

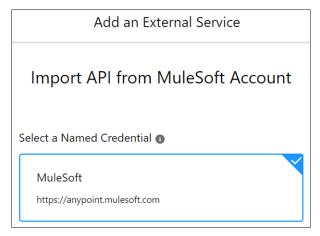


Note: To use the External Services for MuleSoft wizard, a valid MuleSoft license or demo account is required.

From Setup, enter <code>external</code> in the Quick Find box, then select **External Services**. Add an external service and select **From MuleSoft**.



Select your named credentials to access MuleSoft Anypoint Platform and click Next.



Configure the external service, and select the named credential for the MulesSoft API that you select to import.



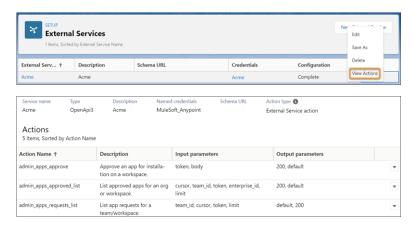
Select the operations to import as actions, and click **Next**. You can select up to 25 actions for each external service.



Review the details of each imported action, and click **Done**.



To see the actions that you imported via the external service, click the dropdown menu next to the external service, and then click **View Actions**.



# Lightning App Builder

Get a more accurate readout of your record page's performance from the Performance Analysis tool, which now includes custom components in its assessment. A fix to how visibility rules are handled during edit, create, and clone helps make your users more efficient while working on record pages.

#### IN THIS SECTION:

## Improve Page Performance with Custom Lightning Component Analysis

Get insights on custom Lightning components on your Lightning record pages. Updates to the Lightning page analysis tool in the Lightning App Builder give you more performance predictions for your Lightning page.

Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes with Rebate Types Panel and Rebate Types Tab Components

Add the Rebate Types Panel component to a mapped object. Select and apply eligible rebate types. After the rebate types are applied, use the Rebate Types Tab component to view and modify the related benefit tiers.

# Hidden Accordion and Tabs Components Now Stay Hidden During Create, Edit, and Clone

Visibility rules on Accordion and Tabs components in Dynamic Forms-enabled pages are no longer ignored during create, edit, and clone. For example, let's say you have a visibility rule on an Accordion component that causes it to be hidden while a user views a record page. When the user clicks to create, edit, or clone, all fields and field sections in that hidden Accordion component now remain hidden in the create, edit, and clone windows.

## Create a Dynamic Actions Bar for Your App Page (Pilot)

Access all your most important actions in one convenient bar. Easily add, drag, and configure the Dynamic Actions Bar component on your app page with the Lightning App Builder. Customize your bar with standard and custom global actions.

# Use New Einstein Next Best Action Component Attribute

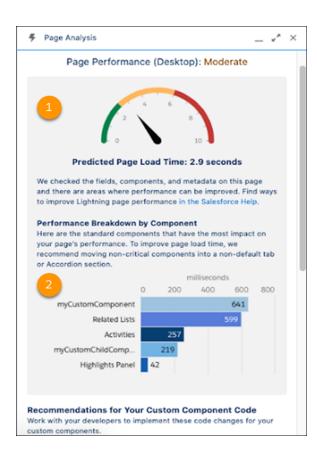
The Einstein Next Best Action component now lets you set the builder that was used to create the strategy to Strategy Builder using the Strategy Source field. Existing Lightning page configurations that use the component are unaffected.

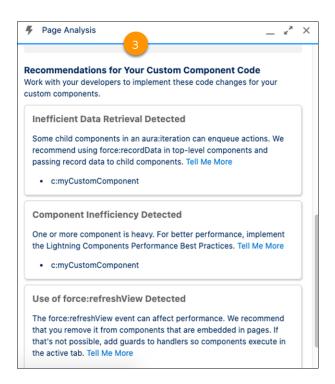
# Improve Page Performance with Custom Lightning Component Analysis

Get insights on custom Lightning components on your Lightning record pages. Updates to the Lightning page analysis tool in the Lightning App Builder give you more performance predictions for your Lightning page.

**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. Custom Lightning components on your Lightning record pages are now analyzed and incorporated into the desktop performance analysis card results. This analysis includes your page's predicted Experienced Page Time (EPT), or page load time (1) and the component performance breakdown card (2). Recommendations for optimizing custom components also appear when relevant (3).





## SEE ALSO:

Salesforce Help: Lightning Page Performance (can be outdated or unavailable during release preview) External Link: Get More Detailed Information About Your Lightning Page Performance on Desktop

# Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes with Rebate Types Panel and Rebate Types Tab Components

Add the Rebate Types Panel component to a mapped object. Select and apply eligible rebate types. After the rebate types are applied, use the Rebate Types Tab component to view and modify the related benefit tiers.

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

Who: Available only in orgs that have Rebate Management enabled.

SEE ALSO:

Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes

# Hidden Accordion and Tabs Components Now Stay Hidden During Create, Edit, and Clone

Visibility rules on Accordion and Tabs components in Dynamic Forms-enabled pages are no longer ignored during create, edit, and clone. For example, let's say you have a visibility rule on an Accordion component that causes it to be hidden while a user views a record page. When the user clicks to create, edit, or clone, all fields and field sections in that hidden Accordion component now remain hidden in the create, edit, and clone windows.

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

# Create a Dynamic Actions Bar for Your App Page (Pilot)

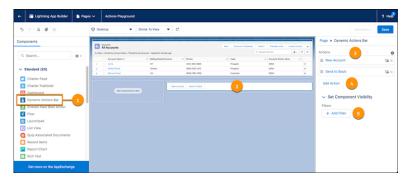
Access all your most important actions in one convenient bar. Easily add, drag, and configure the Dynamic Actions Bar component on your app page with the Lightning App Builder. Customize your bar with standard and custom global actions.

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



**Note:** We provide the Dynamic Actions Bar to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. 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.

How: To add a Dynamic Actions Bar to your Lightning app page, first create or edit a Lightning app page in the Lightning App Builder.



In the Lightning App Builder, drag the Dynamic Actions Bar component (1) to add it to a region on your page (2). The order of actions in the properties pane (3) determines their order in the Dynamic Actions Bar. Click **Add Action** (4) to add actions to the Dynamic Actions Bar. Click **Add Filter** (5) to set visibility filters for the Dynamic Actions Bar component. Save your work.

If the page isn't already active, click **Activation** and select an activation option for the page.

SEE ALSO:

Salesforce Help: Standard Lightning Page Components (can be outdated or unavailable during release preview)

# Use New Einstein Next Best Action Component Attribute

The Einstein Next Best Action component now lets you set the builder that was used to create the strategy to Strategy Builder using the Strategy Source field. Existing Lightning page configurations that use the component are unaffected.

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

# **Fields**

Protect your Salesforce org's overall health with new inactive picklist options. A new limit on custom fields per object allows you to install additional fields from AppExchange.

#### IN THIS SECTION:

#### Protect Picklist Performance

New picklist options are available to help you protect the health of your Salesforce org. Inactive picklist values can be intentionally created for future use. But in some cases, numerous inactive picklist fields can cause performance issues.

#### Install More Custom Fields Through AppExchange

Now you can install 100 more custom fields through AppExchange packages regardless of your organization limits.

# Prepopulate Dependent Picklists with Default Values

You can now prepopulate a record event with default values in dependent picklists. Default values on dependent picklists are available on accounts, opportunities, contacts, leads, and custom objects.

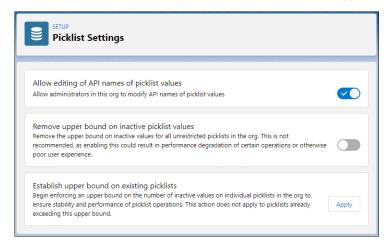
# Protect Picklist Performance

New picklist options are available to help you protect the health of your Salesforce org. Inactive picklist values can be intentionally created for future use. But in some cases, numerous inactive picklist fields can cause performance issues.

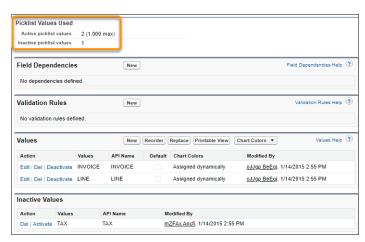
**Where:** This change applies to Lightning Experience and Salesforce Classic in Contact Manager, Developer, Professional, Enterprise, Essentials, Group, Personal, Performance, and Unlimited editions.

How: Two new settings on the Picklist Settings page give you control over inactive values for unrestricted picklists.

- A limit of 4,000 on inactive values for unrestricted picklists is set by default. Removing the limit with the Remove upper bound on
  inactive picklist values setting is recommended only for troubleshooting, such as when errors occur during data creation or
  metadata deployment. This option applies to custom and standard picklists. The 4,000 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.
- The **Establish upper bound on existing picklists** setting runs a query on picklists to find inactive values that satisfy the limit criteria and enforce the limit for those picklists. This option applies the upper bound limit only to standard picklists.



Also, a new section on the detail page for picklists shows the number of active and inactive picklist values being used along with the maximum number allowed. Unrestricted bound picklists have a limit of 1,000 on active picklists and a limit of 4,000 on inactive picklists. Restricted picklists have a combined active and inactive limit of 1,000 and the total number is shown. Use this information to determine which picklist fields are using the highest number of active and inactive picklist values.



When converting text fields to picklists, the current text values are converted to inactive picklist values. If you exceed the upper bound limit during conversion, an error is raised.

#### SEE ALSO:

Salesforce Help: Manage Inactive Picklist Values (can be outdated or unavailable during release preview)

# Install More Custom Fields Through AppExchange

Now you can install 100 more custom fields through AppExchange packages regardless of your organization limits.

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

**Why:** Each Salesforce edition has a limit on the number of custom fields per object that you can create and install. The new increase on custom fields per object allows you to install 100 more fields through AppExchange. For example, for the Unlimited Edition, you can create 800 custom fields on an object and install 100 fields through AppExchange packages. For Enterprise Edition, you can create 500 custom fields on an object and install 400 fields through AppExchange packages. The total custom field limit can't exceed 900, so if you're approaching the limit, we recommend that you hard delete or erase custom fields that you no longer need.

The new 900 field hard limit applies only to these objects.

- Account
- AccountContactRelation
- Asset
- Campaign
- CampaignMember
- Case
- Contact
- Custom Object
- Individual
- KnowledgeArticleVersion
- Lead
- Opportunity
- OpportunityLineItem
- Order

- OrderItems (Order Product)
- Product2 (Products)
- Solution
- Users
- UserRole (Role)

SEE ALSO:

Salesforce Help: Custom Fields Allowed Per Object (can be outdated or unavailable during release preview)

# Prepopulate Dependent Picklists with Default Values

You can now prepopulate a record event with default values in dependent picklists. Default values on dependent picklists are available on accounts, opportunities, contacts, leads, and custom objects.

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

SEE ALSO:

Component Reference: force:createRecord (can be outdated or unavailable during release preview)

# Einstein Recommendation Builder

Build recommendations faster and smarter with Einstein Recommendation Builder. You can build a custom recommendation or use a template. The Parts to Work Orders template lets you build field service recommendations quickly.

IN THIS SECTION:

Recommend Parts on Field Service Work Orders with a Recommendation Template

Save users time and boost productivity by suggesting parts. Use the preconfigured Parts to Work Order template to easily recommend parts for work orders. And adjust your settings to optimize the recommendation. Instead of using rules-based logic, build smarter recommendations with Einstein as it learns from past data.

SEE ALSO:

Einstein Release Notes

# Recommend Parts on Field Service Work Orders with a Recommendation Template

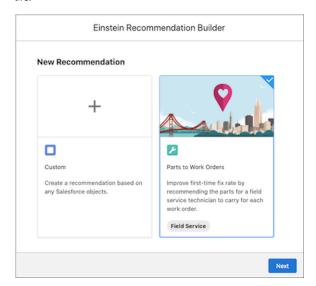
Save users time and boost productivity by suggesting parts. Use the preconfigured Parts to Work Order template to easily recommend parts for work orders. And adjust your settings to optimize the recommendation. Instead of using rules-based logic, build smarter recommendations with Einstein as it learns from past data.

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

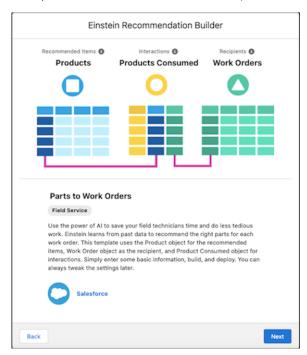
Who: This feature is available with the Service Cloud Einstein and Lightning Platform Plus licenses.

**How:** Enable your Field Service features at the org level with just a few clicks. From Setup, in the Quick Find Box, enter Field Service Settings, then enable your field service settings and save. You can build a template-based or custom recommendation. Choose Parts to Work Orders. After the recommendation builds, review your results in the scorecard. The Einstein Recommendation Builder Setup list view lets you access your recommendation.

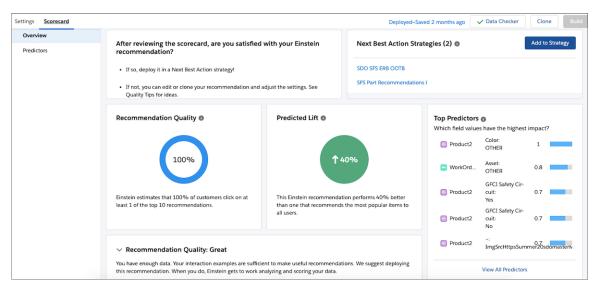
With Field Service Lightning, build your recommendation with the Parts to Work Orders template or from scratch by choosing the Custom tile.



When you choose the Parts to Work Orders template, Einstein uses objects that are relevant for a field service recommendation.



Name your recommendation and build. Your build results appear in your recommendation's scorecard.



Want to iterate your recommendation? No problem. Simply clone it, then adjust your settings.

SEE ALSO:

Field Service Release Notes

# **Profiles and Permissions**

Working with permissions keeps getting better and more flexible with user assignments that expire. And the Read Only standard profile is converted to a custom profile now.

#### IN THIS SECTION:

# Set Expirations for Assignments on Permissions in Permission Sets and Permission Set Groups (Beta)

When assigning users to a permission set or permission set group, select expiration dates that you specify. Control when a user's permissions expire based on your business requirements.

# Enable Permission Set Group Assignments with Expiration Dates (Beta) Option

Enable Permission Set Group Assignments with Expiration Dates (beta) to use an updated user interface that includes an assignment expiration option. The option appears on the User Management Settings page in Setup.

# Convert the Read Only Standard Profile to a Custom Profile (Update, Enforced)

This update converts the Read Only standard profile to a custom profile, which allows you to edit permissions in this profile as your business needs require. This update was first available in Spring '21 and is enforced in Summer '21.

# Set Expirations for Assignments on Permissions in Permission Sets and Permission Set Groups (Beta)

When assigning users to a permission set or permission set group, select expiration dates that you specify. Control when a user's permissions expire based on your business requirements.

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



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

**Why:** Suppose a sales manager needs consultants to evaluate language used in sales contracts. You give the consultants access to the Contracts object and other permissions via a permission set group so that they can perform their work. The project has an end date, so you don't want contractors to access sales contracts after that date. Set the expiration date and time zone for the permission set group when you assign it to users.

How: You can set an expiration date for a permission set or permission set group using the API.

To use the user interface with assignment expiration options for permission set groups, enable **Permission Set Group Assignments** with Expiration Dates (Beta) in User Management Settings. Then, when you assign users to a permission set group, select the expiration options that you want. You can also select no expiration date as an option.



#### SEE ALSO:

Salesforce Help: Permission Set and Permission Set Group Assignment Expiration (Beta) (can be outdated or unavailable during release preview)

Enable Permission Set Group Assignments with Expiration Dates (Beta) Option

# Enable Permission Set Group Assignments with Expiration Dates (Beta) Option

Enable Permission Set Group Assignments with Expiration Dates (beta) to use an updated user interface that includes an assignment expiration option. The option appears on the User Management Settings page in Setup.

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

#### SEE ALSO:

Salesforce Help: Permission Set and Permission Set Group Assignment Expiration (Beta) (can be outdated or unavailable during release preview)

Set Expirations for Assignments on Permissions in Permission Sets and Permission Set Groups (Beta)

# Convert the Read Only Standard Profile to a Custom Profile (Update, Enforced)

This update converts the Read Only standard profile to a custom profile, which allows you to edit permissions in this profile as your business needs require. This update was first available in Spring '21 and is enforced in Summer '21.

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

**When:** This update was first available in Spring '21 and is enforced 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:** The Read Only standard profile allowed assigned users to view 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 risk tolerance and definition of read only, this update converts the Read Only standard profile to a custom profile. After this update is enforced, 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.

As part of this change, Essentials editions can create up to two custom profiles and Professional editions can create up to three custom profiles. The converted custom Read Only profile counts towards this limit.

**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 custom code to reference the correct name of the Read Only standard profile after it's converted to make sure that your configurations and deployments remain intact.

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.

New Salesforce orgs created in Spring '21 and later don't have the Read Only profile. We recommend that you start with the Minimum Access standard profile as a least-privilege profile base, and assign custom permission sets to grant this user the Read access required by your business needs.

#### SEE ALSO:

Knowledge Article: Read Only Profile Conversion to Custom Profile

Release Update Announcements

Spring '21 Release Notes: Convert the Read Only Standard Profile to a Custom Profile (Update)

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

# **AppExchange**

Salesforce now collects US sales tax for one-time and recurring AppExchange purchases. To determine if your purchase is taxable, we use your shipping address and tax-exempt status.

## IN THIS SECTION:

Prepare for US Sales Tax Collection on Your AppExchange Purchases

Salesforce now collects US sales tax for one-time and recurring AppExchange purchases. To determine if your purchase is taxable, we use your shipping address and tax-exempt status.

# Prepare for US Sales Tax Collection on Your AppExchange Purchases

Salesforce now collects US sales tax for one-time and recurring AppExchange purchases. To determine if your purchase is taxable, we use your shipping address and tax-exempt status.

When: US sales tax collection starts on June 1, 2021.

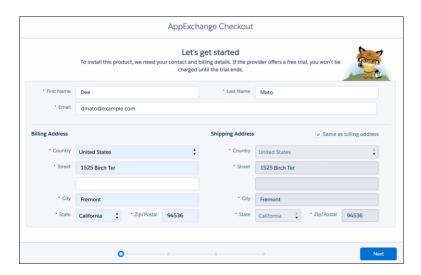
**Why:** To comply with US local tax laws, Salesforce collects sales tax from AppExchange customers and remits collected sales tax to your local tax authority.

If the following factors are true, an AppExchange purchase is taxable.

- Your shipping address is in the US.
- The US state or local authority that has jurisdiction in your shipping address imposes sales tax on the transaction.
- Your purchase isn't tax exempt.

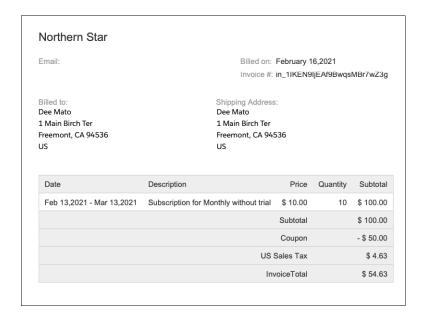
**How:** Because Salesforce uses your shipping address to help determine if a purchase is taxable, you must keep a shipping address on file.

For new purchases, you're prompted to provide a shipping address during checkout.



For existing recurring subscriptions, Salesforce automatically retrieves your on-file billing address and saves it as your shipping address.

Your shipping address appears on your AppExchange invoices. For taxable purchases, invoices also list the sales tax amount, and sales tax is included in the invoice total.



# **General Setup**

Define CRUD permissions to control which users can access background operations and get improved field-level access and sharing rules. The Secure Agent feature is being retired in Winter '22.

#### IN THIS SECTION:

# Customize Access to Background Operations

With the Summer '21 release, the BackgroundOperation standard object has enhanced access settings. Admins can now define CRUD permissions to control which users can have access to background operations. Field-level access and sharing rules for the BackgroundOperation object are also enhanced.

# Save Time with Mass Actions in Split View

No need to open a separate list page—act on multiple records at once, now in split view. Select items in the split view list and apply an action to all of them in standard or console view.

## Secure Agent Is Being Retired in Winter '22

The Secure Agent feature, which supports the Files Connect for Sharepoint On-Premises license, is being retired in Winter '22. After that it's no longer available as a downloadable client from the My Settings page or as a standard object in the SOAP API. We recommend that you move to Files Connect for SharePoint Online or plan for an alternative solution.

# Customize Access to Background Operations

With the Summer '21 release, the BackgroundOperation standard object has enhanced access settings. Admins can now define CRUD permissions to control which users can have access to background operations. Field-level access and sharing rules for the BackgroundOperation object are also enhanced.

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

**Who:** In Salesforce orgs created before the Summer '21 release, profiles with View Setup and Configuration permission and users with custom permissions could access background operations. As of Summer '21, only profiles that an admin grants Read access to and whose license allows it can guery background operations. CRUD is enabled automatically within 24 hours of the release.

The field-level access to background operations is determined by user permissions:

- Users with View Setup and Configuration permission can view all the fields of the BackgroundOperation object.
- Users without View Setup and Configuration permission can view only the values of Id, Name, Type, ParentKey, Status, CreatedBy, ExpiresAt, SubmittedAt, FinishedAt, StartedAt, CreatedDate, ProcessAfter, and Error fields. All the other fields display a null value.

You can query for a background operation based on the new Type field. These are sharing rules for different background operation types:

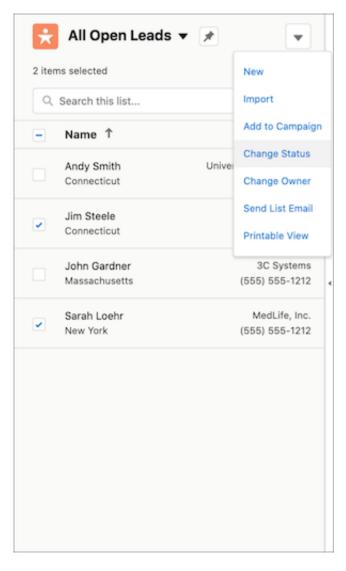
- Sweeper: Users with Customize Application permission or record owner
- WebCart: B2B Commerce Super User or owner of the related web cart
- AsyncQuery, ExternalChangeDataCapture, ExternalObject, and XClean: Users with View Setup and Configuration permission or record owner
- Note: Users with View All permission on the BackgroundOperation object or View All Data permission can access all background operation types.

# Save Time with Mass Actions in Split View

No need to open a separate list page—act on multiple records at once, now in split view. Select items in the split view list and apply an action to all of them in standard or console view.

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

**How:** A split view automatically has checkboxes if there's an action available for all the items in the list, and you can apply an action to the selected records in the actions dropdown menu. The items automatically deselect after you apply the action. Mass actions in split view follow the same logic as mass actions in table view. Inline edit isn't supported in split view, so you see checkboxes only if the object has mass actions available.



SEE ALSO:

Set Up a Mass Quick Action

Mass Quick Action Considerations

# Secure Agent Is Being Retired in Winter '22

The Secure Agent feature, which supports the Files Connect for Sharepoint On-Premises license, is being retired in Winter '22. After that it's no longer available as a downloadable client from the My Settings page or as a standard object in the SOAP API. We recommend that you move to Files Connect for SharePoint Online or plan for an alternative solution.

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

**Why:** Secure Agent serves as the communication layer between Salesforce first-party data centers and Sharepoint hosted in customer data centers. Because Files Connect for SharePoint On-Premises is being retired on October 1, 2021, the Secure Agent feature also is being retired on that date.

SEE ALSO:

Files Connect for SharePoint On-Premises Retirement

# 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

Create a quick action that invokes a Lightning web component. Create styling hooks for your custom Lightning web components. Use the audit trail to track when your users create, change, or delete a custom Lightning component. Aura components in the uinamespace are deprecated and no longer supported after May 1, 2021.

# Einstein Vision and Language

Not a data scientist or machine learning expert, but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pretrained 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 developers extend Salesforce with custom, elastically scalable business logic built with industry-standard 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.

#### Visualforce

An ongoing release update prevents consecutive API navigation calls in Visualforce pages. Another release update increases security when calling the Visualforce Remoting API. Both release updates are enforced in Winter '22.

#### Anex

Apex reference content is now available as a separate Apex Reference Guide, with conceptual information retained in the Apex Developer Guide. The Transactions Finalizers feature is generally available. New Database methods support an AccessLevel parameter that enables you to run database operations in user mode, instead of in the default system mode.

#### API

Legacy versions of the Salesforce Platform API have been retired. New Metadata API documentation will be reformatted for easier scanning and viewing. And a new Warning header has been added to the Platform REST API and the Bulk API.

## **Packaging**

Create package versions based on a branch in your version control system. Manage access to Apex tests that run at package version creation. Test upcoming features in your packages by specifying the release version of the package. Secure the subscriber support console in your License Management Org using multi-factor authentication.

## Scratch Orgs

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

#### Sandboxes

Use new tools to secure personally identifiable information and other sensitive data in a sandbox.

## 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.

# 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.

## AppExchange Partners

Gain efficiency and insight using AppExchange App Analytics query strategy best practices. Switch from Usage Metrics to AppExchange App Analytics to access deeper managed package usage data. Prepare your customers for US sales tax collection. Determine what drives lead events and chat engagement on your listing in the updated AppExchange Marketplace Analytics dashboard.

## **Platform Events**

Use the EventUuid field to identify platform event messages.

## New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

# **Lightning Components**

Create a quick action that invokes a Lightning web component. Create styling hooks for your custom Lightning web components. Use the audit trail to track when your users create, change, or delete a custom Lightning component. Aura components in the ui namespace are deprecated and no longer supported after May 1, 2021.



**Note**: Looking for new and changed Lightning web components, Aura components, and Aura component interfaces? See the lists of new and changed items at the end of the Development section.

### IN THIS SECTION:

## Aura Components in the ui Namespace Are Deprecated

We're ending support for the deprecated components on May 1, 2021. Retiring our legacy components enables us to focus on components that match the latest web standards in performance, accessibility, user experience, and internationalization.

## Create Quick Actions with Lightning Web Components (Generally Available)

To save your users time and clicks, create a quick action that invokes a Lightning web component. On a record page, create a screen action that shows the component in a window, or create a headless action that executes with a click.

# Create Styling Hooks for Lightning Web Components

To expose styling hooks for your custom components, use CSS custom properties. CSS custom properties also make code easier to read and update.

## Monitor Lightning Component Changes in the Setup Audit Trail

Use the audit trail to track when your users create, change, or delete a custom Lightning component. Audit history is especially useful when multiple developers work on components.

#### Deploy a New Custom Label and Component Together

Deploy a new custom label and a reference to that custom label in an existing Lightning web component in a single deployment. Previously, you deployed the new custom label then added a reference to it in an existing Lightning web component in a second deployment.

# **Event Targets Are Always Retargeted**

Event targets are always retargeted regardless of the timing that an event handler was added.

## 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.

# Lightning Locker Sanitize Markup Changes

Lightning Locker tightened the sanitizing of markup to improve security. Several potential mutation-based cross-site scripting (mXSS) vectors are prevented. Self-closing <iframe /> tags use invalid markup and are removed from the DOM. Use <iframe> and </iframe> tags instead.

# Lightning Components Release Updates

We're enforcing two release updates. Also, we have two new release updates and another existing release update.

### SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

# Aura Components in the ui Namespace Are Deprecated

We're ending support for the deprecated components on May 1, 2021. Retiring our legacy components enables us to focus on components that match the latest web standards in performance, accessibility, user experience, and internationalization.

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

**When:** Salesforce is ending 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.

**How:** Migrate to Lightning Web Components (LWC) whenever possible. 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.

When migrating to Lightning Web Components, use lightning-menu-item with lightning-button-menu.

#### ui:button

Use lightning:button, lightning:buttonIcon, or lightning:buttonIconStateful. For button groups, use lightning:buttonGroup.

When migrating to Lightning Web Components, use lightning-button, lightning-button-icon, or lightning-button-icon-stateful. For button groups, use lightning-button-group.

#### ui:checkboxMenuItem

Use lightning:menuItem with lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-menu-item with lightning-button-menu.

#### ui:inputCheckbox

Use lightning:input with checkbox, toggle, or checkbox-button type instead. For checkbox groups, use lightning:checkboxGroup.

When migrating to Lightning Web Components, use lightning-input with checkbox, toggle, or checkbox-button type. For checkbox groups, use lightning-checkbox-group.

## ui:inputCurrency

Use lightning:input with number type and currency formatter instead.

When migrating to Lightning Web Components, use lightning-input with number type and currency formatter.

## ui:inputDate

Use lightning:input with date type instead.

When migrating to Lightning Web Components, use lightning-input with date type.

## ui:inputDateTime

Use lightning:input with datetime type instead.

When migrating to Lightning Web Components, use lightning-input with datetime type.

# ui:inputDefaultError

Use lightning:input with built-in field validation instead.

When migrating to Lightning Web Components, use lightning-input with built-in field validation.

#### ui:inputEmail

Use lightning:input with email type instead.

When migrating to Lightning Web Components, use lightning-input with email type.

## ui:inputNumber

Use lightning:input with number type instead.

When migrating to Lightning Web Components, use lightning-input with number type.

# ui:inputPhone

Use lightning:input with phone type instead.

When migrating to Lightning Web Components, use lightning-input with phone type.

## ui:inputRadio

Use lightning:input with radio type instead. For radio groups, use lightning:radioGroup.

When migrating to Lightning Web Components, use lightning-input with radio type. For radio groups, use lightning-radio-group.

## ui:inputRichText

Use lightning:inputRichText instead.

When migrating to Lightning Web Components, use lightning-input-rich-text.

## ui:inputSecret

Use lightning:input with password type instead.

When migrating to Lightning Web Components, use lightning-input with password type instead.

#### ui:inputSelect

Use lightning:combobox for desktops and lightning:select for mobile screens.

When migrating to Lightning Web Components, use the lightning-combobox component. To support mobile screens, use the HTML select element.

#### ui:inputSelectOption

Use lightning:select or lightning:combobox instead.

When migrating to Lightning Web Components, use the HTML select element or the lightning-combobox component.

#### ui:inputText

Use lightning:input with text type instead.

When migrating to Lightning Web Components, use lightning-input with text type.

## ui:inputTextArea

Use lightning:textarea instead.

When migrating to Lightning Web Components, use lightning-textarea.

## ui:inputURL

Use lightning:input with url type instead.

When migrating to Lightning Web Components, use lightning-input with url type.

#### ui:menu

Use lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-button-menu.

## ui:menuItem

Use lightning:menuItem with lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-menu-item with lightning-button-menu.

## ui:menuItemSeparator

Use lightning:menuDivider with lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-menu-divider with lightning-button-menu.

#### ui:menuList

Use lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-button-menu.

# ui:menuTrigger

Use lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-button-menu.

## ui:menuTriggerLink

Use lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-button-menu.

## ui:message

Use lightning:notificationsLibraryinstead.

When migrating to Lightning Web Components, use the lightning/platformShowToastEvent module.

#### ui:outputCheckbox

Use lightning:input instead. Set type to checkbox and set readonly to true.

When migrating to Lightning Web Components, use lightning-input with checkbox type and set readonly to true.

# ui:outputCurrency

Use lightning: formattedNumber instead. Set style to currency.

When migrating to Lightning Web Components, use lightning-formatted-number with format-style set to currency.

#### ui:outputDate

Use lightning: formattedDateTime instead.

When migrating to Lightning Web Components, use lightning-formatted-date-time.

#### ui:outputDateTime

Use lightning: formattedDateTime or lightning: formattedTime instead.

When migrating to Lightning Web Components, use lightning-formatted-date-time or lightning-formatted-time.

## ui:outputEmail

Use lightning: formattedEmail instead.

When migrating to Lightning Web Components, use lightning-formatted-email.

### ui:outputNumber

Use lightning: formattedNumber instead.

When migrating to Lightning Web Components, use lightning-formatted-number.

# ui:outputPhone

Use lightning: formattedPhone instead.

When migrating to Lightning Web Components, use lightning-formatted-phone.

## ui:outputRichText

Use lightning: formattedRichText instead.

When migrating to Lightning Web Components, use lightning-formatted-rich-text.

### ui:outputText

Use lightning: formattedText instead.

When migrating to Lightning Web Components, use lightning-formatted-text.

# ui:outputTextArea

Use lightning: formattedText instead.

When migrating to Lightning Web Components, use lightning-formatted-text.

#### ui:outputURL

Use lightning: formattedUrl instead.

When migrating to Lightning Web Components, use lightning-formatted-url.

#### ui:radioMenuItem

Use lightning:menuItem with lightning:buttonMenu instead.

When migrating to Lightning Web Components, use lightning-menu-item with lightning-button-menu.

#### ui:scrollerWrapper

There's no lightning namespace equivalent for this component. You can now use native scrolling in the Salesforce mobile app, so the wrapper isn't required. See Improved Scrolling is the New Standard for more information.

#### ui:spinner

Use lightning: spinner instead.

When migrating to Lightning Web Components, use lightning-spinner.

#### SEE ALSO:

Lightning Aura Components Developer Guide: Migrate Components from the UI Namespace
Lightning Web Components Developer Guide: Migrate Aura Components to Lightning Web Components

# Create Quick Actions with Lightning Web Components (Generally Available)

To save your users time and clicks, create a quick action that invokes a Lightning web component. On a record page, create a screen action that shows the component in a window, or create a headless action that executes with a click.

**Where:** This change applies to Lightning Experience desktop in Developer, Enterprise, Essentials, Professional, and Unlimited editions. Quick actions aren't available in Experience Cloud sites.

Why: Make the custom component that's essential to your users' workflow easier to access. For example, your users often upload receipts to records, so you create a custom lightning-file-upload component that prompts them to upload a .png file. This component works well, but requires users to open the object's page to access it. If you define the component as a screen action, your users can click the quick action and upload the receipt in a pop-up window without leaving the page.

How: To set up a Lightning web component as a quick action on a record page, define the metadata in <component>.js-meta.xml. Define a lightning\_\_\_RecordAction target and specify actionType as ScreenAction for a screen action that opens in a window or Action for a headless action that executes when clicked. Here's the configuration for a headless action.

To use a headless action, add an exposed invoke () method to your component.

```
import { LightningElement, api } from "lwc";
```

```
declare default class HeadlessSimple extends LightningElement {
   @api invoke() {
     console.log("Hi, I'm an action.");
   }
}
```



Note: LWC quick actions are currently supported only on record pages.

SEE ALSO:

Lightning Web Components Developer Guide: Lightning Quick Actions (can be outdated or unavailable during release preview)

Salesforce Help: Quick Actions

# Create Styling Hooks for Lightning Web Components

To expose styling hooks for your custom components, use CSS custom properties. CSS custom properties also make code easier to read and update.

Where: This change applies to Lightning Experience and the Salesforce mobile app.

**Why:** Document your component's styling hooks as part of your component's API. To change a component's style, a consumer simply sets values for the styling hooks—they don't need to know how you implemented the styles.

**How:** To define a CSS custom property in a component's style sheet, prefix the property with --. To insert the value of the property, use var ()

```
:host {
    --important-color: red;
}
.important {
    color: var(--important-color);
}
```

CSS custom properties are inherited. Inherited properties pierce the shadow DOM. Some CSS properties, like color, are also inherited. Because CSS custom properties are inherited, a consumer can set their values at a higher level in the DOM tree and style your component.

These CSS custom properties create styling hooks for two themes: light and dark. Pass the fallback value as an optional second parameter to var ().

```
/* myComponent.css */
.light {
   background-color: var(--light-theme-backgroud-color, lightcyan);
   color: var(--light-theme-text-color, darkblue);
}
.dark {
   background-color: var(--dark-theme-background-color, darkslategray);
   color: var(--dark-theme-text-color, ghostwhite);
}
```

A consumer can set values for the styling hooks to change the theme colors.

```
/* consumerComponent.css */
```

```
:host {
    --light-theme-backgroud-color: honeydew;
    --light-theme-text-color: darkgreen;
    --dark-theme-background-color: maroon;
    --dark-theme-text-color: ivory;
}
```

To experiment with this code in a playground, see lwc.dev.



Note: CSS custom properties are supported in Spring '21, so you can start using them right away.

SEE ALSO:

MDN: Custom properties (--\*): CSS variables

# Monitor Lightning Component Changes in the Setup Audit Trail

Use the audit trail to track when your users create, change, or delete a custom Lightning component. Audit history is especially useful when multiple developers work on components.

Where: This change applies to Aura and Lightning web components in Lightning Experience and Salesforce Classic.

**How:** To view the audit history, from Setup, in the Quick Find box, enter *View Setup Audit Trail*, then select **View Setup Audit Trail**.



**Note:** Because of the structure of component bundles, more than one entry for the same change sometimes appears in the audit trail. But you can identify that the entries are for the same change because their timestamps are identical.

SEE ALSO:

Salesforce Help: Monitor Setup Changes with Setup Audit Trail

# Deploy a New Custom Label and Component Together

Deploy a new custom label and a reference to that custom label in an existing Lightning web component in a single deployment. Previously, you deployed the new custom label then added a reference to it in an existing Lightning web component in a second deployment.

**Where:** This change applies to deployment of Lightning web components using the Metadata API or Salesforce Developer Experience (DX).

SEE ALSO:

Salesforce DX Developer Guide

# **Event Targets Are Always Retargeted**

Event targets are always retargeted regardless of the timing that an event handler was added.

Where: This change applies to Lightning Out and Visualforce.

**Why:** Event retargeting is essential in Shadow DOM to prevent the internal details of a component from being exposed. Before the change, event listeners that were added to the page before the framework was initialized weren't subject to event retargeting. After the change, event targets are always retargeted regardless of the timing that an event handler was added. This change can impact apps running on Lightning Out or Visualforce.

**How:** We recommend that you update your event handlers to avoid accessing the internal details of Lightning web components. Let's say you have a button element in a component.

Previously, the event's target was the button in the child component's shadow root. With this change, the event's target is the child component's host element c-child.

This code no longer works:

```
handleClick(event) {
   if (event.target.tagName === 'BUTTON') {
        // do something
   }
}
```

In this example, the event target accesses the child component's host element instead.

```
// After
handleClick(event) {
   if (event.target.tagName === 'C-CHILD') {
        // do something
   }
}
```

# 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 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.

# Lightning Locker Sanitize Markup Changes

Lightning Locker tightened the sanitizing of markup to improve security. Several potential mutation-based cross-site scripting (mXSS) vectors are prevented. Self-closing <iframe /> tags use invalid markup and are removed from the DOM. Use <iframe> and </iframe> tags instead.

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

# Lightning Components Release Updates

We're enforcing two release updates. Also, we have two new release updates and another existing release update.

## IN THIS SECTION:

## Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Enforced)

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, Enforced)

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.

## Securely Access Aura Components (Update)

This update ensures that an external component with access="public" is accessible only to other components within its same namespace or to internal Salesforce components. This update is enforced in Winter '22.

## Enforce OAuth Scope for Lightning Apps (Update)

This update enforces the scope of an OAuth token used to authenticate a Lightning app. Previously, the scope wasn't enforced for Lightning apps. The scope of an OAuth token is defined in a connected app. This change prevents a Lightning app from using OAuth tokens with unintended permissions. This update is scheduled for enforcement in Winter '22.

# Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Enforced)

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 started 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 Update Announcements

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

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 started 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.

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, 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 "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 Update Announcements

# 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 Update Announcements

# Securely Access Aura Components (Update)

This update ensures that an external component with access="public" is accessible only to other components within its same namespace or to internal Salesforce components. 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 Summer '21 and is enforced 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:** Aura uses the access="public" flag to determine component access for custom components. Without this update, Aura inconsistently determines component access for custom components with access="public".

**How:** Fixing this issue can reveal other issues that were previously undetected. For example, before this update, a callback that wasn't wrapped in \$A.getCallback() could lose its context but still run successfully. After this update, if a callback loses its context, the access check fails with an error. We recommend performing these testing steps in a sandbox environment to evaluate the release update's impact and fix any component access errors before it's auto-enabled in Winter '22.

- 1. From Setup, in the Quick Find box, enter Release Updates, then select Release Updates.
- 2. For Enable Aura Component Access Fix, enable the release update test run.
- 3. Test pages with custom components and watch for any error messages such as Access Check Failed! in the console log.
- **4.** Fix any broken components.
- 5. When manual testing is complete, disable the release update test run and transfer the code changes to production.
- **6.** In production, enable the release update or wait for it to auto-enable in Winter '22.

SEE ALSO:

Release Update Announcements

# Enforce OAuth Scope for Lightning Apps (Update)

This update enforces the scope of an OAuth token used to authenticate a Lightning app. Previously, the scope wasn't enforced for Lightning apps. The scope of an OAuth token is defined in a connected app. This change prevents a Lightning app from using OAuth tokens with unintended permissions. This update is scheduled for enforcement in Winter '22.

**Where:** This change applies to Lightning apps, including Lightning Out apps, that use OAuth for authentication in Lightning Experience, Salesforce Classic and custom mobile apps. Lightning apps include Lightning Experience and any resource with a URL that ends with app before any optional query string.

**When:** This update is available starting Summer '21 and is scheduled for enforcement 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.

**How:** If you use an OAuth token to access a Lightning app, ensure that the OAuth scope is set to one of the following values, depending on your app's requirements.

- Allow access to Lightning applications (lightning)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)
- Full access (full). Use this option only if none of the other options are sufficient.

To test this update, we recommend working in a sandbox.

- 1. From Setup, in the Quick Find box, enter Release Updates, then select Release Updates.
- 2. Find "Enforce OAuth Scope for Lightning Apps" and click View Details or click Get Started.
- **3.** Test the behavior of Lightning apps that use OAuth for authentication.

**4.** If you use a Lightning Out application, make sure that it's still fully functional.

#### SEE ALSO:

Salesforce Help: Authorize Apps with OAuth

Salesforce Help: OAuth Tokens and Scopes

Salesforce Help: Connected Apps

Salesforce Help: Enable OAuth Settings for API Integration

Release Update Announcements

# Einstein Vision and Language

Not a data scientist or machine learning expert, but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pretrained 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**

The maximum size of an Einstein Object Detection dataset increased from 2 GB to 10 GB. Calls to the Einstein OCR API now return more descriptive error messages.

## Einstein Language

Einstein Intent and named entity recognition (NER) (beta) support these languages in beta: Danish, Korean, and Swedish. When you call the Einstein NER endpoint, the API converts DATETIME entities to the time zone of the specified language.

# **Einstein Vision**

The maximum size of an Einstein Object Detection dataset increased from 2 GB to 10 GB. Calls to the Einstein OCR API now return more descriptive error messages.

## IN THIS SECTION:

## Upload More Data to Enhance Model Accuracy

The image dataset maximum size got a boost from 2 GB to 10 GB for Einstein Object Detection. This increase applies only to a dataset with a type of image-detection.

# Get More Detailed Error Messages for Einstein OCR Calls

Sometimes things go wrong. When you call the optical character recognition (OCR) endpoint, the API now returns more descriptive error messages. In most cases, an error message specifies the issue that caused the error and how to fix it.

# SEE ALSO:

Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision

Einstein Release Notes

# Upload More Data to Enhance Model Accuracy

The image dataset maximum size got a boost from 2 GB to 10 GB for Einstein Object Detection. This increase applies only to a dataset with a type of 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.

SEE ALSO:

Einstein Platform Services Developer Guide: Create a Dataset From a File Asynchronously Einstein Platform Services Developer Guide: Create a Dataset From a File Synchronously

# Get More Detailed Error Messages for Einstein OCR Calls

Sometimes things go wrong. When you call the optical character recognition (OCR) endpoint, the API now returns more descriptive error messages. In most cases, an error message specifies the issue that caused the error and how to fix it.

**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 improved errors are returned for this endpoint: Detect text—POST /v2/vision/ocr

SEE ALSO:

Einstein Platform Services Developer Guide: Detect Text

# Einstein Language

Einstein Intent and named entity recognition (NER) (beta) support these languages in beta: Danish, Korean, and Swedish. When you call the Einstein NER endpoint, the API converts DATETIME entities to the time zone of the specified language.

## IN THIS SECTION:

# Einstein Intent and Einstein NER (Beta) Support More Languages (Beta)

Einstein Intent datasets and models and the named entity recognition (NER) prebuilt model now support more languages in beta: Danish, Korean, and Swedish. When you create an intent dataset, you specify the language. When you train that dataset, the model inherits the language of the dataset.

# Get DATETIME Values in the Right Time Zone for Einstein NER (Beta)

When you call the Einstein named entity recognition (NER) endpoint and omit the timezone parameter, any DATETIME entities returned by the API are converted to the time zone associated with the language passed in the language parameter.

SEE ALSO:

*Einstein Platform Services Developer Guide*: Introduction to Salesforce Einstein Language Finstein Release Notes

# Einstein Intent and Einstein NER (Beta) Support More Languages (Beta)

Einstein Intent datasets and models and the named entity recognition (NER) prebuilt model now support more languages in beta: Danish, Korean, and Swedish. 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.



**Note:** As a beta feature, Danish, Korean, and Swedish language support is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**How:** For Einstein Intent, when you create the dataset, you specify the language in the language parameter. For Einstein NER, you specify the language in the language parameter when you pass in text for a prediction. 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
- Detect entities in text—POST /v2/language/entities

#### 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: Detect Entities in Text

# Get DATETIME Values in the Right Time Zone for Einstein NER (Beta)

When you call the Einstein named entity recognition (NER) endpoint and omit the timezone parameter, any DATETIME entities returned by the API are converted to the time zone associated with the language passed in the language parameter.

**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 call the NER endpoint and pass a timezone parameter, that parameter value is always used to normalize the DATETIME entity returned by the call so that it shows the date/time value for the specified time zone. If you omit the timezone parameter in the call, the DATETIME entity is now normalized based on the language parameter value.

For example, if you pass a language parameter value of en\_US, the DATETIME value is converted to the America/Los Angeles time zone. The response looks something like this JSON.

If you pass a language parameter value of en\_GB, the DATETIME value is converted to the Europe/London time zone. The response to the same call looks something like this JSON.

```
"probabilities": [
  {
    "probability": 0.99119055,
    "label": "DATETIME",
    "token": "in two hours",
    "span": {
      "start": 19,
      "end": 31
    },
    "normalizedData": [
      {
        "value": "2021-03-29T23:40:00.000+01:00",
        "unit": "minute",
        "type": "value"
      }
    ]
],
"object": "predictresponse"
```

If you omit the language parameter, the default language is en\_US, and the DATETIME value is converted to the America/Los Angeles time zone.

# SEE ALSO:

Einstein Platform Services Developer Guide: What is Einstein NER (Beta)
Einstein Platform Services Developer Guide: Entity Normalization
Einstein Platform Services Developer Guide: Detect Entities in Text

# Salesforce Functions: Extend Salesforce with Functions (Beta)

Salesforce Functions lets developers extend Salesforce with custom, elastically scalable business logic built with industry-standard 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:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

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 Summer '21. Look for further announcements and details on developer.salesforce.com and in the Salesforce Functions Trailblazer Community, or sign up to get notified when more details are available.

**Why:** A Function is your code, run on demand, in a Salesforce managed compute runtime. Use cases include complex business calculations, batch processes, and resource-intensive automation tasks. Salesforce Functions are fully managed by the Salesforce Platform, which takes care of everything else necessary to invoke your code in a secure, auto-scaling environment.

**How:** Write JavaScript or Java code that uses Salesforce Functions SDKs 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. Another release update increases security when calling the Visualforce Remoting API. Both release updates are enforced in Winter '22.

For more information on features affected by these enhancements, refer to the Visualforce Developer's Guide.

#### IN THIS SECTION:

## Securely Call the Visualforce Remoting API (Previously Released 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.

# 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.

## Prevent Validation Errors in a Repeat Component

If you see a validation error when selecting a value in a <apex:selectList> page component that's within a repeat component, use the new Boolean attribute called skipValidationInRepeat to skip validation of the selected value.

# Securely Call the Visualforce Remoting API (Previously Released 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 was available starting Spring '21 and is enforced 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: 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. 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.
- **2.** 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){...}
...
```

- **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.** More complex failures that don't have a simple resolution can 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 production.
- 7. In production, enable the release update or wait for it to auto-enable in Winter '22.

SEE ALSO:

Release Update Announcements

Spring '21 Release Notes: Securely Call the Visualforce Remoting API

# 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 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:** 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 Update Announcements** 

# Prevent Validation Errors in a Repeat Component

If you see a validation error when selecting a value in a <apex:selectList> page component that's within a repeat component, use the new Boolean attribute called skipValidationInRepeat to skip validation of the selected value.

# **Apex**

Apex reference content is now available as a separate Apex Reference Guide, with conceptual information retained in the Apex Developer Guide. The Transactions Finalizers feature is generally available. New Database methods support an AccessLevel parameter that enables you to run database operations in user mode, instead of in the default system mode.

For more information on these enhancements, refer to the Apex Developer Guide and the Apex Reference Guide.

### IN THIS SECTION:

Apex Reference Information Moved from the Apex Developer Guide to the Apex Reference Guide

With Summer '21, Apex reference content is moved from the Apex Developer Guide into a new Apex Reference Guide. All conceptual information is retained in the Apex Developer Guide.

Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Generally Available)

With Summer '21, the Transaction Finalizers feature is generally available.

Secure Apex Code with User Mode Database Operations (Pilot)

You can now declare when Apex runs database operations in user mode or system mode. The new Database methods support an AccessLevel parameter that enables you to run database operations in user mode, instead of in the default system mode.

SEE ALSO:

Apex: New and Changed Items

# Apex Reference Information Moved from the Apex Developer Guide to the Apex Reference Guide

With Summer '21, Apex reference content is moved from the Apex Developer Guide into a new Apex Reference Guide. All conceptual information is retained in the Apex Developer Guide.

**Where:** This change applies to Lightning Experience and Salesforce Classic.

# Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Generally Available)

With Summer '21, the Transaction Finalizers feature is generally available.

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

**How:** The System. FinalizerContext interface contains four methods.

- 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 Finalizer 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 in Apex Developer Guide.

# Secure Apex Code with User Mode Database Operations (Pilot)

You can now declare when Apex runs database operations in user mode or system mode. The new Database methods support an AccessLevel parameter that enables you to run database operations in user mode, instead of in the default system mode.

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



**Note:** We provide User-Mode Database Operations in Apex 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. You can provide feedback and suggestions for the feature in the Trailblazer Community.

**Why:** By default Apex code executes in system mode and doesn't respect running user permissions. To enhance the security context of Apex, you can specify user-mode access for database operations by invoking Apex in user mode. The field-level security (FLS), sharing rules, and CRUD permissions of the running user are respected in user mode, unlike in system mode.

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

A new class object represents the two modes that Apex runs database operations. Use this new class to define the execution mode as user mode or system mode. These new methods support passing the class object:

- Database.query methods
- Search.query methods
- Database DML methods (insert, update, upsert, merge, delete, undelete, convertLead)

# **API**

Legacy versions of the Salesforce Platform API have been retired. New Metadata API documentation will be reformatted for easier scanning and viewing. And a new Warning header has been added to the Platform REST API and the Bulk API.

# IN THIS SECTION:

# Deprecation and End Of Support for Platform API Legacy Versions

As of this release, legacy versions 20.0 and earlier of the Salesforce Platform API are deprecated and are no longer supported by Salesforce

# Scan and View New Metadata API Documentation More Easily

New Metadata API reference documentation contains field tables with two columns instead of three columns. Field type and description are now in the same column. In addition, new documentation contains other minor formatting differences, such as a separate section for parent type information. All of the same information is still present on the page.

## Warning Header

The Platform REST API and Bulk API now return a Warning header if there are any warnings, such as the use of a deprecated version of the API.

# Use the Default Value of Flow Screen Components for Choice Resources

The defaultValue field on the FlowScreenField subtype of the Flow metadata type can now be used for choice resources. The defaultValue field is now supported when the FlowScreenField subtype has a fieldType field value of RadioButtons, DropdownBox, MultiSelectCheckboxes, or MultiSelectPicklist. A FlowScreenField can't have both a defaultValue and a defaultSelectedChoiceReference field.

# Additional Permission Required to View Async SOQL Jobs

To view the status of Async SOQL jobs, you must now have read access to the BackgroundOperation object. Previously, you viewed such jobs without extra permissions.

# Deploy and Retrieve Up to 35,000 files in AppExchange Packages with Metadata API

You can now deploy and retrieve up to 35,000 files in AppExchange packages using Metadata API. Previously, the file limit was 31,000 files. The file limit increase accommodates larger AppExchange packages.

# Deprecation and End Of Support for Platform API Legacy Versions

As of this release, legacy versions 20.0 and earlier of the Salesforce Platform API are deprecated and are no longer supported by Salesforce.

Where: This change affects the following API versions:

#### **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.



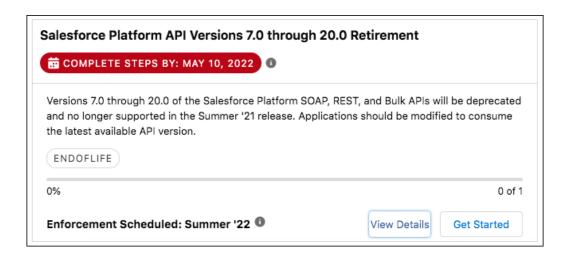
**Note:** You can continue to use these legacy API versions until Summer '22 is released, at which time these legacy versions will become retired and unavailable. When these legacy versions are retired, applications consuming these versions of the APIs will experience disruption. The requests will fail with an error message indicating that the requested endpoint is deactivated.

Who: This change 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 '22 release, you *must* modify or upgrade their applications to function with current API versions.

For more information, see the Knowledge Article Salesforce Platform API Versions 7.0 through 20.0 Retirement and the "Salesforce Platform API Versions 7.0 through 20.0 Retirement" release update notice. (From Setup, in the Quick Find box, enter Release Updates.)



# Scan and View New Metadata API Documentation More Easily

New Metadata API reference documentation contains field tables with two columns instead of three columns. Field type and description are now in the same column. In addition, new documentation contains other minor formatting differences, such as a separate section for parent type information. All of the same information is still present on the page.

Why: These formatting changes ensure consistency, improve the ability to scan docs, and provide a better mobile experience.

# Warning Header

The Platform REST API and Bulk API now return a Warning header if there are any warnings, such as the use of a deprecated version of the API.

**How:** Check this header to see if there are actions you need to take. An example header is:

Warning: 299 - "This API is deprecated and will be removed by Summer '22. Please see https://help.salesforce.com/articleView?id=000351312 for details."

# Use the Default Value of Flow Screen Components for Choice Resources

The defaultValue field on the FlowScreenField subtype of the Flow metadata type can now be used for choice resources. The defaultValue field is now supported when the FlowScreenField subtype has a fieldType field value of RadioButtons, DropdownBox, MultiSelectCheckboxes, or MultiSelectPicklist. A FlowScreenField can't have both a defaultValue and a defaultSelectedChoiceReference field.

**Why:** You can set a default value for a screen component that displays choices. Flow Builder treats what you select for the default value in different ways.

If the Default Value Is	Then the Default Selection
A choice resource that's included in the list of choices associated with a screen component	Continues to be stored in defaultSelectedChoiceReference.
A choice resource that's not included in the list of choices associated with a screen component	Is stored in defaultValue.

If the Default Value Is	Then the Default Selection
A FlowElementReferenceOrValue	Is stored in defaultValue. At run time, we select the choice whose value matches this selection.

For information about how the default value is used to preselect choice options when a flow is run, see Set a Default Value for Any Screen Component That Displays Choices on page 321.

# Additional Permission Required to View Async SOQL Jobs

To view the status of Async SOQL jobs, you must now have read access to the BackgroundOperation object. Previously, you viewed such jobs without extra permissions.

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

**How:** As the admin, from Setup, navigate to the permission set assigned to the user who requires read access. In the Object Settings, enable Read access for the BackgroundOperation standard object.

#### SEE ALSO:

Salesforce Help: Edit Object Permissions (can be outdated or unavailable during release preview)

Object Reference for Salesforce and Lightning Platform: BackgroundOperation

# Deploy and Retrieve Up to 35,000 files in AppExchange Packages with Metadata API

You can now deploy and retrieve up to 35,000 files in AppExchange packages using Metadata API. Previously, the file limit was 31,000 files. The file limit increase accommodates larger AppExchange packages.

## SEE ALSO:

Metadata API Developer Guide: Metadata Limits

Metadata API Developer Guide: Deploying and Retrieving Metadata with the Zip File

# **Packaging**

Create package versions based on a branch in your version control system. Manage access to Apex tests that run at package version creation. Test upcoming features in your packages by specifying the release version of the package. Secure the subscriber support console in your License Management Org using multi-factor authentication.

# IN THIS SECTION:

## Do More with Branches in Unlocked and Second-Generation Managed Packages

Development teams who use branches in their source control system (SCS) often build package versions based on the metadata in a particular branch of their SCS. To make it easier to identify which branch a package version is based on, we enhanced the branch attribute. You can specify the branch name for a package version or a package dependency in the sfdx-project.json file, or directly on the command line using Salesforce CLI.

#### Manage Access for Apex Tests That Run at Package Version Creation

Sometimes the Apex tests that you write require a user to have certain permission sets or permission set licenses. Previously, test-specific permissions had to be added to each Apex test. Now you can use the apexTestAccess setting in the sfdx-project.json file, and assign permission sets and permission set licenses to all the Apex tests in your package.

#### Create Package Versions Based on the Upcoming Release

During major Salesforce release transitions, you can now specify preview or previous when creating a package version. In Spring '21, we added the ability to specify the previous release. 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.

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

This update is part of the Salesforce requirement that all customers enable multi-factor authentication (MFA) for their Salesforce products. Released in Winter '21, this update was scheduled for auto-activation in Summer '21, but that has been changed to Spring '22 to align with the larger Salesforce requirement. This update secures access to subscriber orgs by requiring MFA when logging into the License Management Org (LMO).

#### Distribute Access to Features with Permission Sets and Permission Set Groups

Use permission sets and permission sets groups to distribute access to features across an enterprise with unlocked packages. Now your development team can easily distribute and manage the permission updates that are included in updated features. Previously, permission sets and permission set groups were partially supported in unlocked packages.

# Do More with Branches in Unlocked and Second-Generation Managed Packages

Development teams who use branches in their source control system (SCS) often build package versions based on the metadata in a particular branch of their SCS. To make it easier to identify which branch a package version is based on, we enhanced the branch attribute. You can specify the branch name for a package version or a package dependency in the sfdx-project.json file, or directly on the command line using Salesforce CLI.

Where: This change applies to second-generation managed packages and unlocked packages.

SEE ALSO:

Salesforce DX Developer Guide: Use Branches in Second-Generation Managed Packaging Salesforce DX Developer Guide: Use Branches in Unlocked Packaging

# Manage Access for Apex Tests That Run at Package Version Creation

Sometimes the Apex tests that you write require a user to have certain permission sets or permission set licenses. Previously, test-specific permissions had to be added to each Apex test. Now you can use the apexTestAccess setting in the sfdx-project.json file, and assign permission sets and permission set licenses to all the Apex tests in your package.

Where: This change applies to second-generation managed packages and unlocked packages.

Who: Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

**How:** Assign permission sets and permission set licenses in the sfdx-project.json file. These permissions are assigned to the user in context when the Apex tests run at package version creation.

```
"SalesConsoleUser"
]
}
```

SEE ALSO:

Salesforce DX Developer Guide: Specify Unpackaged Metadata or Apex Access for Package Version Creation Tests Salesforce Help: Permission Set Licenses

# Create Package Versions Based on the Upcoming Release

During major Salesforce release transitions, you can now specify preview or previous when creating a package version. In Spring '21, we added the ability to specify the previous release. 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.

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:** To create a package version based on the upcoming Salesforce release version, create a scratch org definition file that contains:

```
"release": "preview"
}
```

In the sfdx-project.json file, set the sourceApiVersion to correspond with the release version of the package version you're creating.

Then when you create your package version, specify the scratch org definition file.

```
sfdx force:package:version:create --package pkgA --definitionfile
config/project-scratch-def.json
```

SEE ALSO:

Salesforce DX Developer Guide: Target a Specific Release for Your Packages During Salesforce Release Transitions

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

This update is part of the Salesforce requirement that all customers enable multi-factor authentication (MFA) for their Salesforce products. Released in Winter '21, this update was scheduled for auto-activation in Summer '21, but that has been changed to Spring '22 to align with the larger Salesforce requirement. This update secures access to subscriber orgs by requiring 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 will enforce 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. This change also gives you more control and accountability over which users log into a subscriber org.

**How:** 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.

If the License Management Org session hasn't been established using MFA, this update blocks attempts to access the Subscriber Support Console.

SEE ALSO:

Future Requirement to Enable Multi-Factor Authentication (MFA)

Release Updates

*ISVforce Guide*: Log In to Subscriber Orgs

# Distribute Access to Features with Permission Sets and Permission Set Groups

Use permission sets and permission sets groups to distribute access to features across an enterprise with unlocked packages. Now your development team can easily distribute and manage the permission updates that are included in updated features. Previously, permission sets and permission set groups were partially supported in unlocked packages.

Where: This change applies to unlocked packages.

**How:** You can include these components in permission sets or permission set groups in your unlocked package.

- User Permissions
- Standard and Custom Object Permissions
- Field Permissions
- Setup entities exposed via the metadata API
  - Custom Settings
  - Custom Metadata Types
  - Flows
  - Custom Permissions
  - Apps (tab sets)
  - External Data Sources
  - Visualforce Pages
  - Apex Classes

Both permission sets unconstrained by licenses, and permission sets constrained by user or permission set licenses are supported.

# Scratch Orgs

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

For more information, see Scratch Orgs in the Salesforce DX Developer Guide.

## IN THIS SECTION:

# Updates to Org Shape for Scratch Orgs (Beta)

We've enhanced Org Shape for Scratch Orgs in Summer '21. If your source org is different from your Dev Hub org, reenter the Dev Hub Org ID in your source org before attempting to create Scratch Orgs using Org Shape.

# Updates to Org Shape for Scratch Orgs (Beta)

We've enhanced Org Shape for Scratch Orgs in Summer '21. If your source org is different from your Dev Hub org, reenter the Dev Hub Org ID in your source org before attempting to create Scratch Orgs using Org Shape.

Where: This change applies to Developer, Group, Professional, and Enterprise editions.

**How:** To reenter the Dev Hub Org ID:

- 1. As an admin, log in to the source org.
- 2. From Setup, enter Org Shape in the Quick Find box, then select Org Shape.
- **3.** In the source org, enter the 15-character Dev Hub org ID that you're using to create scratch orgs. You can specify up to 50 Dev Hub org IDs.

# Sandboxes

Use new tools to secure personally identifiable information and other sensitive data in a sandbox.

#### IN THIS SECTION:

#### Secure More Data Types Using Data Mask

Enhanced features give you powerful new ways to secure all your sensitive data. Admins can use Data Mask to automatically mask the data in a sandbox.

# Secure More Data Types Using Data Mask

Enhanced features give you powerful new ways to secure all your sensitive data. Admins can 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:

These enhancements are available in Data Mask:

- Data Mask is now available for Work.com and Industry products.
- Enhanced masking rules ensure that the User.username field on the User object is always uniquely masked.
- You can now mask Boolean check box data.
- The supported API version is now v50.0

#### 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: Salesforce Data Mask

# **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 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.

# Develop 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.

#### SEE ALSO:

Salesforce Extensions for Visual Studio Code Salesforce CLI Setup Guide Salesforce CLI Command Reference Salesforce DX Developer Guide

# 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.

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 Summer '21.

#### IN THIS SECTION:

#### Deprecation of BEM Notation with Double Dashes Is Postponed

The BEM notation with double dashes (--) in Lightning Design System was scheduled to be deprecated in Summer '21 and replaced by the single underscore notation ( ). This deprecation has been *postponed indefinitely*.

# Default Font Is System UI Font

SLDS design tokens now use the native sans-serif font that the operating system's UI provides by default. Salesforce Sans is no longer used.

#### Design Tokens Use New Salesforce Color System

Many SLDS design tokens now use the new Salesforce Color System.

# Lightning Design System Component Blueprint Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

# Deprecation of BEM Notation with Double Dashes Is Postponed

The BEM notation with double dashes (--) in Lightning Design System was scheduled to be deprecated in Summer '21 and replaced by the single underscore notation ( ). This deprecation has been *postponed indefinitely*.

**Why:** We planned this change because double dashes aren't 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 and Spring '21 release notes.

**How:** In Summer '21, BEM notation with double dashes is still available in SLDS 2.13.0 through SLDS 2.15.0 versions. Although the deprecation is postponed, we recommend that you 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 there are no changes to those versions. If you're using later SLDS versions, both notation styles continue to work indefinitely.

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.

# Default Font Is System UI Font

SLDS design tokens now use the native sans-serif font that the operating system's UI provides by default. Salesforce Sans is no longer used.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app. For more information, see Read More Easily with Native Fonts on page 69.

# Design Tokens Use New Salesforce Color System

Many SLDS design tokens now use the new Salesforce Color System.

**Why:** The new Salesforce Color System is being phased in across Salesforce products. See the article *Introducing the Salesforce Color System* on Medium for more information.

# 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.

- Popovers
- Rich Text Editor

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.

#### **Builder Header**

Updated actions in the top bar and made some minor changes to colors.

Added two toolbar icons and variations for status text and alerts with popovers.

Added aria-expanded to dropdown item.

#### **Button Icon**

Added a style class for warning icons.

#### **Buttons**

Changed line-height styling hook assignment in touch styles.

## **Dueling Picklist**

Changed the responsive class to use up the available horizontal space.

#### **Icons**

Added standard and utility icons named product quantity rules.

# **Page Headers**

Fixed incorrect annotations for multiple styles.

#### **Panels**

Added a new element, .slds-panel\_header-actions, within the panel header to hold secondary actions that affect the entire panel. You can find the close button within the new element.

Added aria-expanded and aria-controls to the button that toggles the panel.

#### **Popovers**

Styling hooks are enabled.

Base popover has these changes.

- Footer background is now explicitly set to \$color-background design token.
- Header is now part of the body and is wrapped in a Media Object to match the prompt variant.
- The header's bottom border was removed.
- New variant with an icon
- New variant with badge above header

These popup variants have changed.

- Warning and Error variants have transparent footer background color and the body is indented to align with header.
- Prompt variant footer has changed the top border color and width to match the base popover.
- Walkthrough variant's footer background color changed to \$palette-blue-20 and the header background image is removed.

These popup variants are new.

- Light brand and dark brand, including these new selectors: .slds-popover\_brand, .slds-popover\_brand-dark, .slds-popover\_brand-top, .slds-popover\_brand-left, .slds-popover\_brand-bottom, .slds-popover\_brand-right
- Prompt brand, which uses the new selectors with the .slds-popover prompt selectors.

#### **Rich Text Editor**

Styling hooks are enabled.

# Tabs

Adjusted color of unsaved tab indicator asterisk to comply with accessibility color contrast rules for active tabs and tabs with notification.

Added styling hooks.

Removed white background-color from .slds-tabs default to expose surface color of the tabs parent container.

The back icon present in tabs on mobile is replaced by chevronleft. This is an inherited change from panels and it makes the icon consistent between the drilled-in states.

# **AppExchange Partners**

Gain efficiency and insight using AppExchange App Analytics query strategy best practices. Switch from Usage Metrics to AppExchange App Analytics to access deeper managed package usage data. Prepare your customers for US sales tax collection. Determine what drives lead events and chat engagement on your listing in the updated AppExchange Marketplace Analytics dashboard.

#### IN THIS SECTION:

#### Optimize Your AppExchange App Analytics Query Strategy with Best Practices

Planning App Analytics queries to run throughout the day, week, and month reduces time spent retrieving data and increases the amount of data captured. Four newly available fields on the AppAnalyticsQueryRequest object in SOAP API are key to planning your query strategy: FileType, FileCompression, AvailableSince, and QuerySubmittedTime.

#### Usage Metrics Is Being Retired

Usage Metrics is scheduled for retirement in Winter '22. Switch now to AppExchange App Analytics, which provides richer usage data about how subscribers interact with your AppExchange solutions.

# Prepare Your AppExchange Customers for US Sales Tax Collection

AppExchange now supports US sales tax collection for Checkout-enabled purchases. Salesforce collects and remits taxes as mandated by local tax authorities. To determine whether a purchase is taxable, we use the customer's shipping address and their tax-exempt status.

## See Lead Event Drivers and More in the Updated AppExchange Marketplace Analytics Dashboard

Lead events are the gold standard for customer engagement on your AppExchange listing. That's because lead events signal strong customer interest in your solution and allow your sales team to follow up with prospects directly. The new Lead Events and Lead Events Timeline visualizations show the listing activities and resources that drive the most lead events. The new Chat Engagement visualization provides insights into the performance of your AppExchange Chat implementation.

# Optimize Your AppExchange App Analytics Query Strategy with Best Practices

Planning App Analytics queries to run throughout the day, week, and month reduces time spent retrieving data and increases the amount of data captured. Four newly available fields on the AppAnalyticsQueryRequest object in SOAP API are key to planning your query strategy: FileType, FileCompression, AvailableSince, and QuerySubmittedTime.

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.

**Why:** AppExchange partners' solutions produce large amounts of usage data. These new fields give you the ability to reduce file size and to retrieve smaller chunks of data throughout specified time periods.

**How:** Reduce your App Analytics file download size and download time with FileType and FileCompression. Create catch-up queries to sweep in late-arriving data by rerunning AppAnalyticsQueryRequest queries that you ran previously. In your catch-up query, use the AvailableSince field set to the date and time of an original query. To find the original query date and time, use your original query's AppAnalyticsQueryRequest ID to retrieve the QuerySubmittedTime.

To activate AppExchange App Analytics, log a case. 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 Best Practices
SOAP API Developer Guide AppAnalyticsQueryRequest
New and Changed Objects

# Usage Metrics Is Being Retired

Usage Metrics is scheduled for retirement in Winter '22. Switch now to AppExchange App Analytics, which provides richer usage data about how subscribers interact with your AppExchange solutions.

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 case. 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
SOAP API Developer Guide AppAnalyticsQueryRequest
SOAP API Developer Guide MetricsDataFile
Usage Metrics

# Prepare Your AppExchange Customers for US Sales Tax Collection

AppExchange now supports US sales tax collection for Checkout-enabled purchases. Salesforce collects and remits taxes as mandated by local tax authorities. To determine whether a purchase is taxable, we use the customer's shipping address and their tax-exempt status.

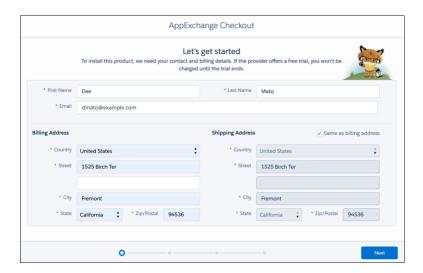
When: US sales tax collection starts on June 1, 2021.

**Why:** To comply with US state and local jurisdiction tax laws, Salesforce collects sales tax from AppExchange customers, and remits collected sales tax to the customer's local tax authority.

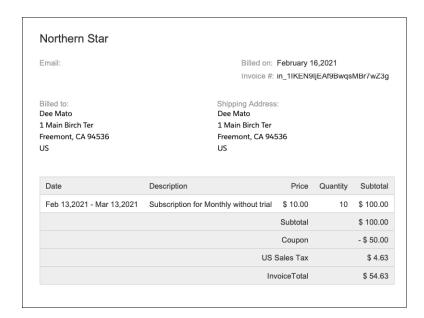
If the following factors are true, an AppExchange purchase is taxable.

- Your customer's shipping address is in the US.
- The US state or local authority that has jurisdiction in your customer's shipping address imposes sales tax on the transaction.
- Your customer's purchase isn't tax exempt.

**How:** Because Salesforce uses the customer's shipping address to help determine if a purchase is taxable, all customers must keep a shipping address on file. For new purchases, customers are required to provide a shipping address during checkout. For existing recurring subscriptions, Salesforce automatically retrieves the customer's billing address from Stripe, our Checkout payment partner, and saves it as their AppExchange shipping address.



All invoices list the customer's shipping address. Invoices for taxable purchases also list the sales tax amount, and sales tax is included in the invoice total.



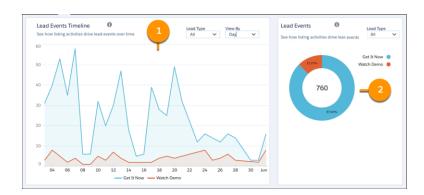
# See Lead Event Drivers and More in the Updated AppExchange Marketplace Analytics Dashboard

Lead events are the gold standard for customer engagement on your AppExchange listing. That's because lead events signal strong customer interest in your solution and allow your sales team to follow up with prospects directly. The new Lead Events and Lead Events Timeline visualizations show the listing activities and resources that drive the most lead events. The new Chat Engagement visualization provides insights into the performance of your AppExchange Chat implementation.

Where: The updated Marketplace Analytics dashboard is available in the Salesforce Partner Community.

**Who:** Marketplace Analytics is available to eligible Salesforce partners. AppExchange Chat is required to view chat metrics in Marketplace Analytics. For more details, go to AppExchange Chat in the Salesforce Partner Community.

**Why:** Previously, Marketplace Analytics showed only the total number of lead events that occurred on your listing. The Lead Events Timeline (1) and Lead Events (2) visualizations take you a level deeper, showing the contribution of demos, Get It Now clicks, and other activities to total lead events.



AppExchange Chat lets your sales reps and chatbots engage with customers live on your listing. The new Chat Engagement visualization (3) helps you spot trends in these interactions. For example, you can use the visualization to see which day of the week is most popular for live chat, and then make staffing decisions accordingly.



**How:** To view the Marketplace Analytics dashboard, log in to the Salesforce Partner Community, click **Publishing**, then navigate to the Analytics tab.

# **Platform Events**

Use the EventUuid field to identify platform event messages.

## IN THIS SECTION:

# Filter Your Stream of Platform Events with Channels (Pilot)

Receive only the event messages that match a predefined filter on a custom channel. Create a channel and configure it with a field-value filter. CometD subscribers to the channel receive a filtered stream of events. With fewer events delivered to subscribers, event processing is optimized. Also, CometD subscribers can make more efficient use of the CometD event delivery allocation.

# Identify and Match Event Messages with the EventUuid Field

Platform event messages now include the EventUuid field, which identifies an event message and is available in subscribers using API version 52.0 and later. Use this field to match published and received event messages by comparing the UUIDs of the received events with those returned in the SaveResult of publish calls. This way, you can find any event messages that aren't delivered and republish them.

# Filter Your Stream of Platform Events with Channels (Pilot)

Receive only the event messages that match a predefined filter on a custom channel. Create a channel and configure it with a field-value filter. CometD subscribers to the channel receive a filtered stream of events. With fewer events delivered to subscribers, event processing is optimized. Also, CometD subscribers can make more efficient use of the CometD event delivery allocation.

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



**Note:** We provide Platform Event Stream Filtering to selected customers through a pilot program that requires agreement to specific terms and conditions. This feature 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.

**How:** An administrator with the Customize Application permission can configure stream filtering using Tooling API or Metadata API. For the pilot, only one filter and one custom platform event are supported per channel. The filter expression can contain one Text or Number field and its value. To create a channel, use PlatformEventChannel. To add a filter expression for a custom platform event, use PlatformEventChannelMember.



#### Note:

- Custom channels and channel members are shared features with Change Data Capture. As a result, for the pilot only, Change Data Capture allocations are used as part of the platform event stream filter configuration. Each unique platform event you add to a channel counts against the default allocation of 5 selected entities. Each channel counts against the maximum number of 100 custom channels.
- This pilot feature is supported for custom platform events that you define, but not for standard platform events.
- This pilot feature is supported in CometD subscribers but not in other types of subscribers, such as Apex triggers, flows, and processes.

# Identify and Match Event Messages with the EventUuid Field

Platform event messages now include the EventUuid field, which identifies an event message and is available in subscribers using API version 52.0 and later. Use this field to match published and received event messages by comparing the UUIDs of the received events with those returned in the SaveResult of publish calls. This way, you can find any event messages that aren't delivered and republish them.

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

**Why:** Event publishing is asynchronous. Some failures are returned in the SaveResult, such as validation or limit errors, but not the asynchronous errors. In rare cases, enqueued publish operations can fail due to a system error, and the event message isn't delivered. You can now use the EventUuid field to determine which enqueued event messages failed to publish and then republish them.

# 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. Take advantage of new B2B Commerce for Lightning functionality, including order shipments, quantity rule information, and search sort rules and suggestions. More B2B Commerce for Lightning methods are available to guest users. Get navigation menu items for an Experience Cloud site.

#### API: New and Changed Items

Access more data objects and metadata types in API version 52.0.

# Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

#### IN THIS SECTION:

## New and Changed Lightning Web Components

Build UI easily with these new and changed components.

#### New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

#### New and Changed Aura Components

Build UI easily with these new and changed components.

# New and Changed Lightning Web Components

Build UI easily with these new and changed components.

# **New Components**

These components are new and require API version 52.0 and later.

#### lightning-quick-action-panel

Builds quick action modals with the same style as the Salesforce Lightning Design System (SLDS) modal. With this component you can customize screen actions and still have consistent UI across all actions. Use lightning-quick-action-panel with the lightning\_RecordAction target to use your custom component as a quick action on a record page. For more information, see Create Quick Actions with Lightning Web Components (Generally Available) on page 230.

#### lightning-service-cloud-voice-toolkit-api

This component provides access to event listeners and methods for the Service Cloud Voice Toolkit API, enabling your component to listen to events that take place during phone calls with service agents. For more information, see Build Tailored Solutions for Your Customers with the Service Cloud Voice Toolkit API on page 613.

# **Changed Lightning Web Components**

These components have changed.

# lightning-button-icon

This attribute is new.

• aria-haspopup—Indicates that the button has an interactive popup element. Valid values are true, false, menu, listbox, tree, grid, or dialog.

# lightning-formatted-text

This attribute has changed.

value—When linkify is true, URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify value="See www.example.com" the link renders as https://www.example.com.

# lightning-formatted-url

This attribute has changed.

• href—URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify href="www.example.com" the link renders as https://www.example.com.

# lightning-datatable

These attributes are new to provide a caption or description on the element for assistive technologies. We recommend that you use one or the other, but not both.

- aria-label—Labels the datatable for assistive technology. The attribute and its value are passed down to the rendered
   element.
- aria-labelledby—Specifies the ID or list of IDs of the element or elements that contain visible descriptive text to caption or describe the table.

# lightning-helptext

This attribute is new.

• alternative-text—The assistive text for the button icon. This value defaults to "Help".

#### lightning-input-address

This attribute is new.

• country-disabled—Specifies whether the country field is disabled so users can't interact with it. This value defaults to false

#### lightning-pill

This attribute has changed.

• href—URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify href="www.example.com" the link renders as https://www.example.com.

SEE ALSO:

Component Library

# New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

#### **New Modules**

These modules are now available.

#### lightning/cmsDeliveryApi (beta)

This module includes one wire adapter, listContent. Use this wire adapter to get the published CMS content versions for an Experience Cloud site.

```
import { LightningElement, wire } from "lwc";
import Id from '@salesforce/community/Id';
import { listContent } from 'lightning/cmsDeliveryApi';

export default class ListContentDemo extends LightningElement {
    @wire(listContent, {communityId: '$Id'})
    cmsRecords;
}
```

For more information, see Access CMS Content with an LWC Wire Adapter (Beta) on page 579.

## lightning/uiListsApi

This module includes one wire adapter, getListInfoByName. Use this wire adapter to get the metadata for a list view.

```
import { LightningElement, wire } from 'lwc';
import { getListInfoByName } from 'lightning/uiListsApi';
import ACCOUNT_OBJECT from '@salesforce/schema/Account';

export default class ListInfoExample extends LightningElement {
    @wire(getListInfoByName, { objectApiName: ACCOUNT_OBJECT, listViewApiName:
    'AllAccounts' })
    propertyOrFunction;
}
```

#### lightning/analyticsWaveApi (beta)

This module includes multiple wire adapters and methods for implementing Tableau CRM functionality

- executeQuery—Executes a query written in SAQL.
- getAnalyticsLimits—Returns the Tableau CRM limits for the org.
- getDataflowJob—Returns a dataflow job by ID.
- getDataflowJobNode—Returns a single node for a dataflow job.
- getDataflowJobNodes—Returns all of the nodes for a dataflow job.
- getDataflowJobs—Returns a collection of dataflow jobs.
- getDataset—Returns a dataset by ID.
- getDatasets—Returns a collection of datasets.
- getRecipe—Returns a recipe by ID.
- getRecipes—Returns a collection of recipes.
- getReplicatedDatasets—Returns a collection of replicated datasets, also know as connected objects.
- getSchedule—Returns a schedule for an asset by ID.
- getWaveFolders—Returns a collection of folders, also known as Tableau CRM apps.
- getXmd—Returns an XMD by dataset ID, dataset version ID, and XMD type.
- createDataflowJob—Starts a dataflow job for data sync.
- updateDataflowJob—Stops a dataflow job for data sync.
- deleteDataset—Delete a dataset by ID.

- deleteRecipe—Delete a recipe by ID.
- updateSchedule—Create a schedule for an asset by ID.

Use these wire adapters to execute queries, to schedule and run data syncs for dataflows and recipes, and to retrieve Tableau CRM asset information.

```
import { LightningElement, wire } from "lwc";
import { executeQuery } from 'lightning/analyticsWaveApi';
export default class ExecuteQueryDemo extends LightningElement {
 query = '...'; // generate SAQL query for this string
 queryLanguage = 'Saql';
 timezone = undefined;
 metadata = undefined;
 get computedQuery() {
   if (!this.query) { return undefined; }
   return {
     query: this.query,
      queryLanguage: this.queryLanguage, //optional
     timezone: this.timezone, //optional
     metadata: this.metadata //optional
   };
  }
 @wire(executeQuery, {query: '$computedQuery'})
 onExecuteQuery({data, error}) {
   if (error) { console.log('QUERY ERROR:', error); }
   else if (data) {
     // Display or process the query results
      console.log('QUERY RESULT RECORDS:', data.results.records);
    }
  }
}
```

# **Changed Module**

This module is now deprecated.

# lightning/uiListApi (Deprecated)

This module and its wire adapter, getListUi, are deprecated and no longer update. Use lightning/uiListsApi with the getListInfoByName wire adapter instead.

# New and Changed Aura Components

Build UI easily with these new and changed components.

# **Changed Aura Components**

These components have changed.

# lightning:button

This attribute is new.

• ariaHasPopup—Indicates that the button has an interactive popup element. Valid values are true, false, menu, listbox, tree, grid, or dialog.

#### lightning:buttonIcon

This attribute is new.

• ariaHasPopup—Indicates that the button has an interactive popup element. Valid values are true, false, menu, listbox, tree, grid, or dialog.

# lightning:flow

This attribute has changed.

• onstatuschange—The new errors parameter returns errors that occurred when the interview status changes or a new screen displays. For each error, the parameter includes a message and an errorCode.

#### lightning:formattedText

This attribute has changed.

value—When linkify is true, URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify value="See www.example.com" the link renders as https://www.example.com.

# lightning:formattedUrl

This attribute has changed.

• href—URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify href="www.example.com" the link renders as https://www.example.com.

## lightning:datatable

These attributes are new to provide a caption or description on the element for assistive technologies. We recommend that you use one or the other, but not both.

- ariaLabel—Labels the datatable for assistive technology. The label is passed down as the aria-label attribute to the rendered element.
- ariaLabelledby—Specifies the ID or list of IDs of the element or elements that contain visible descriptive text to caption or describe the table.

#### lightning:helptext

This attribute is new.

alternativeText—The assistive text for the button icon. This value defaults to Help.

# lightning:inputAddress

This attribute is new.

• countryDisabled—Specifies whether the country field is disabled so users can't interact with it. This value defaults to false.

# lightning:pill

This attribute has changed.

• href—URLs specified without a protocol use the host domain's protocol. For example, if a host domain uses the https://protocol, when you specify href="www.example.com" the link renders as https://www.example.com.

#### wave:waveDashboard

This attribute is new.

• pageId—Specifies the page ID for the component to use on initialization of a Tableau CRM embedded dashboard. This attribute is optional. If a page ID isn't specified, the component initializes with the default dashboard page.

#### 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 Reference Guide.

#### IN THIS SECTION:

# CommercePayments Namespace

The CommercePayments namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

#### Functions (Beta)

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

#### LxScheduler Namespace

The LxScheduler namespace has these new classes and methods.

#### System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

#### Wave Namespace

The Wave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

#### SEE ALSO:

Apex: New Features

# CommercePayments Namespace

The CommercePayments namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

# New or Changed Methods in Existing Classes

## Set the value of an encrypted payment gateway token

Use the new setGatewayTokenEncrypted(gatewayTokenEncrypted) method in the CommercePayments.PaymentMethodTokenizationResponse class.

# Functions (Beta)

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.



**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms

# New or Changed Methods in Existing Classes

#### Specify Salesforce Functions project information when invoking Functions.

The Function.get (functionName) method now takes a Salesforce Functions project name as part of the string parameter, in addition to the Function name.

# **New Enums**

# Identify error type information for failed Salesforce Functions invocations

Use the new FunctionErrorType enum to identify the error type for a FunctionInvocationError.

# Changed Interfaces

# Get error type information for failed Salesforce Functions invocations

Use the new FunctionInvocationError.getType() method to get the error type for a FunctionInvocationError.

# **LxScheduler Namespace**

The LxScheduler namespace has these new classes and methods.

#### **New Classes**

# Get appointment slots or available service resources based on work type groups and service territories

Use these methods in the lxscheduler. SchedulerResources class.

- getAppointmentCandidates (getAppointmentCandidatesInput) This method returns a list of available service resources.
- getAppointmentSlots (getAppointmentSlotsInput) —This method returns a list of available appointment time slots for a resource based on given work type group and territories.
- setAppointmentCandidatesMock (expectedResponse) This method sets a mock object when running tests for the getAppointmentCandidates method.
- setAppointmentSlotsMock (expectedResponse) This method sets a mock object when running tests for the getAppointmentSlots method.

# Get available appointment candidates based on work type group and service territories

Use the lxscheduler.GetAppointmentCandidatesInput class.

# Build an instance of the lxscheduler. Get Appointment Candidates Input class

Use these methods in the lxscheduler.GetAppointmentCandidatesInputBuilder class.

- $\bullet \quad \texttt{build()} \\ \texttt{This method returns an instance of the lxscheduler.} \\ \texttt{GetAppointmentCandidatesInput object.}$
- setAccountId (accountId) —This method sets the ID of the associated account.
- setAllowConcurrent (allowConcurrent) —This method allows the scheduling of concurrent appointments.
- setApiVersion (apiVersion) —This method sets the API version.
- setEndTime (endTime) —This method sets the scheduling end time to a specified time.
- setFilterByResources (filterByResources) This method enables filtering resources using a comma-separated list of service resource IDs.
- setSchedulingPolicy(schedulingPolicyId)—This method sets the ID of the AppointmentSchedulingPolicy Object.

- setStartTime (startTime) —This method sets the scheduling start time to a specified time.
- setTerritoryIds (territoryIds) This method sets the service territory IDs.
- setWorkType (workType) —This method sets the type of work to be performed.
- setWorkTypeGroupdId (workTypeGroupId) This method sets the ID of the work type group.

## Get appointment time slots for a resource based on given work type group and territories

Use the lxscheduler. GetAppointmentSlotsInput class.

#### Build an instance of the lxscheduler.GetAppointmentSlotsInput class

Use these methods in the lxscheduler.GetAppointmentSlotsInputBuilder class.

- build()—This method returns an instance of the lxscheduler.GetAppointmentSlotsInput object.
- setAccountId (accountId) —This method sets the ID of the associated account.
- setAllowConcurrent (allowConcurrent) —This method allows the scheduling of concurrent appointments.
- setApiVersion (apiVersion) —This method sets the API version.
- setEndTime (endTime) This method sets the scheduling end time to a specified time.
- setPrimaryResourceId (primaryResourceId) —This method sets the ID of the primary resource.
- setSchedulingPolicy(schedulingPolicyId) —This method sets the ID of the AppointmentSchedulingPolicy object.
- setStartTime (startTime) —This method sets the scheduling start time to a specified time.
- setTerritoryIds (territoryIds) —This method sets the service territory IDs.
- setWorkType (workType) This method sets the type of work to be performed.
- setWorkTypeGroupdId (workTypeGroupId) —This method sets the ID of the work type group.

## Set details about the type of work

Use the lxscheduler.WorkType class.

# Build an instance of the lxscheduler.WorkType class

Use these methods in the lxscheduler.WorkTypeBuilder class.

- build()—This method returns an instance of the lxscheduler. WorkType object.
- setBlockTimeAfterAppointmentInMinutes (blockTimeAfterAppointmentInMinutes) This method sets the time period (in minutes) after the appointment is considered unavailable.
- setBlockTimeBeforeAppointmentInMinutes (blockTimeBeforeAppointmentInMinutes) This method sets the time period (in minutes) before the appointment is considered as unavailable.
- setDurationInMinutes (durationInMinutes) This method sets the event length, in minutes.
- setId(id)—This method sets the ID of the work type to a specified ID.
- setOperatingHoursId (operatingHoursId) —This method sets the overlap of operating hours.
- setSkillRequirements (skillRequirements) This method sets the list of skills that are required to complete a particular task for a work type.
- setTimeFrameEndInMinutes (timeFrameEndInMinutes) —This method sets the end of the timeframe.
- setTimeFrameStartInMinutes (timeFrameStartInMinutes) This method sets the beginning of the timeframe.

# Set skills that are required to complete a particular task for a work type

Use the lxscheduler. SkillRequirement class.

## Build an instance of the lxscheduler. Skill Requirement class

Use these methods in the lxscheduler. SkillBuilderBuilder class.

- build()—This method returns an instance of the lxscheduler.SkillRequirement object.
- setSkillId (skillId) —This method sets the skill that is required to perform the work.
- setSkillLevel (skillLevel) —This method sets the level of the skill required to perform the work.

# System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

# New or Changed Methods in Existing Classes

#### DEPRECATED: Method getBaseInsecureUrl() in System.Site

The getBaseInsecureUrl() method in the System. Site class isn't supported in version 52.0 and later.

# **Wave Namespace**

The Wave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

#### **New Classes**

#### Get information about Tableau CRM Lens Assets

Use methods in the new Lenses class. Use the getLenses method to retrieve a collection of Tableau CRM lens assets. Use the getLens method to describe a single lens asset.

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

Create custom experiences in Salesforce using Connect in Apex. Take advantage of new B2B Commerce for Lightning functionality, including order shipments, quantity rule information, and search sort rules and suggestions. More B2B Commerce for Lightning methods are available to guest users. Get navigation menu items for an Experience Cloud site.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the ConnectApi namespace. These methods use other ConnectApi classes to input and return information. We refer to the ConnectApi namespace as Connect in Apex.

#### IN THIS SECTION:

New and Changed Connect in Apex Classes

These classes are new or have changes.

New and Changed Connect in Apex Input Classes

These input classes are new or have changes.

New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

# New and Changed Connect in Apex Enums

These enums are new or have changes.

#### SEE ALSO:

Connect REST API

Apex Reference 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 shipment items

- getOrderShipmentItems(webstoreId, shipmentId)
- getOrderShipmentItems(webstoreId, shipmentId, effectiveAccountId)
- getOrderShipmentItems(webstoreId, shipmentId, effectiveAccountId, fields)
- getOrderShipmentItems(webstoreId, shipmentId, effectiveAccountId, fields, pageToken, pageSize)
- getOrderShipmentItems(webstoreId, shipmentId, effectiveAccountId, fields, pageToken, pageSize, sortOrder)

# **Get order shipments**

- getOrderShipments(webstoreId, orderSummaryId)
- getOrderShipments(webstoreId, orderSummaryId, effectiveAccountId)
- getOrderShipments(webstoreId, orderSummaryId, effectiveAccountId, fields)
- getOrderShipments(webstoreId, orderSummaryId, effectiveAccountId, fields, pageSize, pageToken)
- getOrderShipments(webstoreId, orderSummaryId, effectiveAccountId, fields, pageSize, pageToken, sortOrder)

These new methods are in the ConnectApi.CommerceCatalog class.

## **Get product categories**

• getProductCategoryChildren(webstoreId, effectiveAccountId, parentProductCategoryId, fields, excludeFields, mediaGroups, excludeMedia)

#### Get quantity rule information for a product

• getProduct(webstoreId, productId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia, excludeEntitlementDetails, excludePrimaryProductCategory, excludeVariationInfo, excludeAttributeSetInfo, excludeQuantityRule)

These new methods are in the ConnectApi.CommerceSearch class.

#### Get sort rules for the live index

getSortRules(webstoreId)

# Get suggestions for product searches

getSuggestions(webstoreId, effectiveAccountId, searchTerm, maxResults)

# **Search products**

searchProducts(webstoreId, effectiveAccountId, productSearchInput)

These new methods are in the ConnectApi.CommerceSearchSettings class.

#### **Get indexes**

- getCommerceSearchIndex(webstoreId, indexId)
- getCommerceSearchIndexes (webstoreId)

#### Create an index

createCommerceSearchIndex (webstoreId)

# **Commerce Payments**

This new method is in the ConnectApi. Payments class.

#### Send a payment method to the payment gateway for tokenization

tokenizePaymentMethod(tokenizePaymentMethodInput)

#### **Navigation Menu**

This new method is in the ConnectApi. NavigationMenu class.

#### Get the navigation menu items for an Experience Cloud site

 getCommunityNavigationMenu(communityId, navigationLinkSetId, navigationLinkSetDeveloperName, publishStatus, includeImageUrl, addHomeMenuItem, menuItemTypesToSkip)

# Salesforce Customer Data Platform (CDP)

These new methods are in the ConnectApi.CdpQuery class.

## Get all Salesforce CDP metadata

getAllMetadata()

# Get Salesforce CDP metadata for data model objects in the profile category

getProfileMetadata()

#### Get Salesforce CDP metadata for a data model object in the profile category

getProfileMetadata(dataModelName)

#### Query a Salesforce CDP Profile data model object using filters

• queryProfileApi(dataModelName, filters, fields, batchSize, offset, orderby)

#### Query a Salesforce CDP Profile data model object using filters and a search key

queryProfileApi(dataModelName, id, searchKey, filters, fields, batchSize, offset, orderby)

# Query a Salesforce CDP Profile data model object and a child object using filters and a search key

• queryProfileApi(dataModelName, id, childDataModelName, searchKey, filters, fields, batchSize, offset, orderby)

#### Query a Salesforce CDP Profile data model object and a Calculated Insight object using filters and a search key

 queryProfileApi(dataModelName, id, ciName, searchKey, dimensions, measures, filters, fields, batchSize, offset, orderby)

#### Synchronously guery Salesforce CDP data across data model, lake, unified, and linked objects

queryANSISql(input)

#### **Get Salesforce CDP Insights metadata**

getInsightsMetadata()

#### Get Salesforce CDP metadata for a Calculated Insight object

getInsightsMetadata(ciName)

## **Query a Salesforce CDP Calculated Insight object**

queryCalculatedInsights(ciName, dimensions, measures, orderby, filters, batchSize, offset)

# Salesforce Order Management

This new method is in the ConnectApi.FulfillmentOrder class.

#### Create Invoices for multiple FulfillmentOrders

createMultipleInvoices(invoicesInput)

These new methods are in the ConnectApi.ReturnOrder class.

# Create ReturnOrders and ReturnOrderLineItems

- Note: This method was available but undocumented in version 50.0.
- createReturnOrder(returnOrderInput)

#### **Process ReturnOrderLineItems**

returnItems(returnOrderId, returnItemsInput)

# New and Changed Connect in Apex Input Classes

These input classes are new or have changes.

## **B2B** Commerce for Lightning

# ConnectApi.DistinctValueRefinementInput

This new input class has this property.

values—Comma-separated list of attribute values.

#### ConnectApi.ProductSearchGroupingInput

This new input class 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

#### ConnectApi.ProductSearchInput

This new input class has these properties.

- categoryId—Category ID returns results for products in this category or its subcategories.
- fields—Product fields to return in search results. Search results include fields you have access to. If unspecified, all accessible fields are returned.
- grouping—Specifies whether to group products in search results and how to group them.
- includePrices—Specifies whether to include prices for products in search results (true) or not (false). If unspecified, defaults to false.
- includeQuantityRule—Specifies whether to include purchase quantity rule information for products in search results (true) or not (false). If unspecified, defaults to false.
- page—Number of the page you want returned. Starts at 0. If you don't specify a value or if you specify 0, the first page is returned.
- pageSize—Specifies the number of items per page. Valid values are from 1 through 200. If unspecified, the default is the value specified in Results per Page in **Search** > **Results Display Settings** > **Results Display Limits**.
- refinements—Refinements for search results.
- searchTerm—A list of up to 32 space-separated search terms.
- sortRuleId—ID of the sort rule that specifies the order of products in the search results.

#### ConnectApi.RefinementInput

This new input class is abstract and is a superclass of ConnectApi. DistinctValueRefinementInput. It has these properties.

- attributeType—Search attribute type. Values are:
  - Custom
  - ProductAttribute
  - Standard
- nameOrId—Developer name of the attribute.
- type—Search facet type. Value is:
  - DistinctValue

# **Commerce Payments**

#### ConnectApi.PaymentMethodTokenizationInput

This new input class is a subclass of ConnectApi.BaseRequest and has these properties.

- address—Address of the payment method.
- cardPaymentMethod—Object representation of the card payment method.
- paymentGatewayId—ID of the card payment method's payment gateway.

# Field Service

#### ConnectApi.ShiftsFromPatternInput

This input class has this new property.

- status—Status of the shifts. Default values are:
  - Confirmed
  - Published
  - Tentative

#### Salesforce CDP

#### ConnectApi.CdpQueryInput

This new input class has this property.

• sql—ANSI-standard SQL query.

# Salesforce Order Management

#### ConnectApi.MultipleFulfillmentOrderInvoicesInputRepresentation

This new input class has this property.

• fulfillmentOrderIds—List of IDs of FulfillmentOrders to create Invoices for.

#### ConnectApi.ReturnItemsInputRepresentation

This new input class has these properties.

- returnOrderItemDeliveryCharges—List of ReturnOrderLineItems to return that represent delivery charges.
- returnOrderItems—List of ReturnOrderLineItems to process that represent products, along with data about how to process them.

## ConnectApi.ReturnOrderInputRepresentation

This new input class has these properties.

- orderSummaryId—ID of the OrderSummary containing the items to be returned.
- returnOrderLifeCycleType—The LifeCycleType of the ReturnOrder. This must match the LifeCycleType of the associated Order Summary.
- returnOrderLineItems—List of data for creating ReturnOrderLineItems.
- status—Status to assign the ReturnOrder. This value must match an entry in the ReturnOrder object's Status picklist.

#### ConnectApi.ReturnOrderItemDeliveryChargeInputRepresentation

This new input class has this property.

• returnOrderLineItemId—ID of a ReturnOrderLineItem to return.

#### ConnectApi.ReturnOrderItemInputRepresentation

This new input class has these properties.

- quantityReceived—The quantity of the return order line item that has been received. This value isn't used by any standard features, but is provided for use in customizations.
- quantityRejected—The quantity of the return order line item that has been rejected for return. This value isn't used by any standard features, but is provided for use in customizations.
- quantityReturned—The quantity of the return order line item that has been returned. The value must be greater than zero. If this value plus quantityToCancel is less than the expected return quantity, then the remaining quantity to be returned is added to a new return order line item.

- quantityToCancel—The quantity of the return order line item to remove because it's not being returned. If this value plus quantityReturned is less than the expected return quantity, then the remaining quantity to be returned is added to a new return order line item.
- reasonForRejection—The reason why the rejected quantity, if any, was rejected. This value isn't used by any standard features, but is provided for use in customizations.
- returnOrderLineItemId—The return order line item ID.

#### ConnectApi.ReturnOrderLineItemInputRepresentation

This new input class has these properties.

- canReduceShipping—Whether the associated shipping charge can be refunded.
- orderItemSummaryId—ID of the associated OrderItemSummary.
- quantityExpected—Quantity expected to be returned.
- quantityReceived—Quantity already physically returned. This value isn't used by any standard features, but is provided
  for use in customizations.
- reasonForReturn—Reason for the return. The value must match an entry in the ReturnOrderLineItem object's ReasonForReturn picklist.

# New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

# **B2B** Commerce for Lightning

## ConnectApi.CartItem

This output class has this new property.

• itemizedAdjustmentAmount—Reserved for future use.

# ConnectApi.CartItemProduct

This output class has this new property.

• purchaseQuantityRule—If one exists, purchase quantity rule for the product.

#### ConnectApi.CartSummary

This output class has this new property.

- totalProductAmountAfterAdjustments—Total product amount.
- totalPromotionalAdjustmentAmount—Reserved for future use.

#### ConnectApi.CommerceSearchIndex

This new output class has these properties.

- completionDate—Completion date and time of the index.
- createdDate—Creation date of the index.
- creationType—Creation type of the index. Values are:
  - Manual
  - Scheduled
- id—ID of the index.
- indexStatus—Status of the index. Values are:
  - Completed

- Failed
- InProgress
- indexUsage—Usage of the index. Values are:
  - Live
  - OutOfUse
- message—Detailed message for the index status.

#### ConnectApi.CommerceSearchIndexCollection

This new output class has this property.

• indexes—List of up to two indexes. Returns the completed, live index and either the in-progress, out-of-use index or the most-recently-failed, out-of-use index.

# ConnectApi.DistinctFacetValue

This new output class has these properties.

- displayName—Display name of the facet value.
- nameOrId—Developer name of the attribute.
- productCount—Number of products in the search result that match the facet value.

# ConnectApi.DistinctValueSearchFacet

This new output class has this property.

values—Values of the facet found in the search result. Sorted by display name in alphabetical order.

#### ConnectApi.FacetValue

This new output class is abstract and is a superclass of ConnectApi.DistinctFacetValue. It has this property.

- type—Search facet type. Value is:
  - DistinctValue

#### ConnectApi.FieldValue

This new output class has this property.

value—Value of the field.

# ConnectApi.OrderShipment

This new output class has these properties.

- expectedDeliveryDate—Expected delivery date for the shipment.
- fields—Map of requested fields.
- orderSummaryId—ID of the order summary.
- shipmentId—ID of the shipment.
- shipmentNumber—Number of the shipment.
- status—Status of the shipment.

# ${\tt ConnectApi.OrderShipmentCollection}$

This new output class has these properties.

- count—Total number of records returned in the collection.
- currentPageToken—Token identifying the current page of order shipments.
- currentPageUrl—URL to the current page of order shipments.
- nextPageToken—Token identifying the next page of order shipments.

- nextPageUrl—URL to the next page of order shipments.
- previous PageToken—Token identifying the previous page of order shipments.
- previousPageUrl—URL to the previous page of order shipments.
- shipments—Collection of order shipments.
- sortOrder—Sort order for order shipments. Values are:
  - ExpectedDeliveryDateAsc—Sorts by the oldest expected delivery date.
  - ExpectedDeliveryDateDesc—Sorts by the most recent expected delivery date.
  - ShipmentNumberAsc—Sorts by shipment number in ascending order (0-9).
  - ShipmentNumberDesc—Sorts by shipment number in descending order (9–0).

## ConnectApi.OrderShipmentItem

This new output class has these properties.

- fields—Map of requested fields.
- orderItemSummaryId—ID of the order item summary.
- product—Product mapped to an order item summary.
- productId—ID of the product.
- quantity—Quantity of the product.
- shipmentId—ID of the shipment.
- shipmentItemId—ID of the shipment item.

#### ConnectApi.OrderShipmentItemCollection

This new output class has these properties.

- count—Total number of records returned in a page.
- currentPageToken—Token identifying the current page of order shipment items.
- currentPageUrl—URL to the current page of order shipment items.
- items—Collection of order shipment items.
- nextPageToken—Token identifying the next page of order shipment items.
- nextPageUrl—URL to the next page of order shipment items.
- previous PageToken—Token identifying the previous page of order shipment items.
- previousPageUrl—URL to the previous page of order shipment items.
- sortOrder—Sort order for order shipment items. Values are:
  - 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.ProductCategoryDetailCollection

This new output class has this property.

productCategories—List of product category details.

#### ConnectApi.ProductDetail

This output class has this new property.

• purchaseQuantityRule—If one exists, purchase quantity rule for the product.

#### ConnectApi.ProductSearchResults

This new output class has these properties.

- categories—Categories from the search results.
- facets—Facets from the search results.
- locale—Locale of the search results.
- productsPage—Page of products from the search results.

# ${\tt ConnectApi.ProductSearchSuggestionsResults}$

This new output class has this property.

recentSearchSuggestions—Suggestions based on the user's recent searches.

#### ConnectApi.ProductSummary

This new output class has these properties.

- defaultImage—Default image of the product.
- fields—Map of fields belonging to the product.
- id—ID of the product.
- name—Name of the product.
- prices—Prices of the product.
- productClass—Class of product. Values are:
  - Simple
  - Variation
  - VariationParent
- purchaseQuantityRule—If one exists, purchase quantity rule for the product.
- variationAttributeSet—Variation attribute set that's associated with the product.

#### ConnectApi.ProductSummaryCollection

This new output class has these properties.

- currencyIsoCode—Three-letter ISO 4217 currency code associated with the product.
- pageSize—Number of products per page in the search results.
- products—Collection of product summaries.
- total—Total number of products in the search results.

# ConnectApi.PurchaseQuantityRule

This new output class has these properties.

- increment—Increment value of the quantity that can be purchased.
- maximum—Maximum quantity that can be purchased.
- minimum—Minimum quantity that can be purchased.

# ConnectApi.SearchCategory

This new output class has these properties.

- category—Information about the category.
- children—First-level child categories of the category searched with non-empty search results.
- productCount—Number of products in the search results that belong to the category.

## ConnectApi.SearchFacet

This new output class is abstract and is a superclass of ConnectApi. DistinctValueSearchFacet. It has these properties.

• attributeType—Search attribute type. Values are:

- Custom
- ProductAttribute
- ProductCategory
- Standard
- displayName—Display name of the facet.
- displayRank—Display rank of the facet. Valid values are from 1 through 50.
- displayType—Display type of the facet. Values are:
  - CategoryTree
  - DatePicker
  - MultiSelect
  - SingleSelect
- facetType—Search facet type. Value is:
  - DistinctValue
- nameOrId—Developer name of the attribute.

# ConnectApi.SearchSuggestion

This new output class has this property.

value—Search suggestion.

# ConnectApi.SortRule

This new output class has these properties.

- direction—Direction of the sort rule. Values are:
  - Ascending—Sorts in ascending alphanumeric order (A–Z, 0–9).
  - Default—If there isn't an ascending or descending direction, sorts in default order. For example, sorting by relevancy.
  - Descending—Sorts in descending alphanumeric order (Z-A, 9-0).
- label—Label of the sort rule.
- nameOrId—Name of the sort rule field or, if the sort rule is based on a custom field, ID.
- sortRuleId—ID of the sort rule.
- type—Type of sort rule. Values are:
  - Custom—Custom field or non-product object sort rule.
  - ProductBased—Product sort rule.
  - Relevancy—Relevancy sort rule.

## ConnectApi.SortRulesCollection

This new output class has this property.

sortRules—Collection of sort rules.

# **CMS Managed Content**

#### ConnectApi.ManagedContentChannel

This output class has these changed and new properties.

• domain—ID or name of the domain assigned to the channel.

domainId—This property is no longer available. This information is returned in the new domain property.

# **Commerce Payments**

#### ConnectApi.PaymentMethodTokenizationGatewayResponse

This new output class is a subclass of ConnectApi. AbstractGatewayResponse and has this property.

• gatewayToken—The payment method token sent from the gateway.

#### ConnectApi.PaymentMethodTokenizationResponse

This new output class has these properties.

- error—Error representation for the payment method tokenization process. Sent only if the tokenization process encounters an error in the gateway.
- gatewayResponse—Response containing the tokenized payment method value from the payment gateway.
- paymentGatewayLogs—Logs showing more details about the tokenization process that occurred in the gateway.
- paymentMethod—Object representation of the payment method object that was tokenized.

# **Experience Cloud**

#### ConnectApi.Community

This output class has this new property.

• builderBasedSnaEnabled—Specifies whether the Service Not Available page is an auto-generated Experience Builder-based page (true) or a static resource page that's set in **Workspaces** > **Administration** > **Pages** (false).

# **Navigation Menu**

#### ConnectApi.NavigationMenuItem

This new output class has these properties.

- actionType—URL type or event of the navigation menu item. Values are:
  - Event—Event-based navigation.
    - Note: Event is internal only and can't be used in custom components.
  - ExternalLink—URL outside of your Experience Cloud site.
  - InternalLink—Relative URL inside your Experience Cloud site.
- actionValue—Route URL or event fully qualified name for the navigation menu item.
- imageUrl—URL to the image of the navigation menu item.
- label—Label for the navigation menu item.
- subMenu—Submenu for the navigation menu item.
- target—Target for the navigation menu item. Values are:
  - CurrentWindow—Navigation menu item opens in the current window.
  - NewWindow—Navigation menu item opens in a new window.

## ConnectApi.NavigationMenuItemCollection

This new output class has this property.

menuItems—List of navigation menu items.

# Personalization

#### ConnectApi.FormulaScope

This output class has these changed and new properties.

- contextValues—This property is no longer available. Use the contextValuesMap property instead.
- contextValuesMap—Map of context values for the scope.

#### Salesforce CDP

# ConnectApi.CdpQueryMetadataOutput

This new output class has this property.

metadata—Metadata set.

#### ConnectApi.CdpQueryOutput

This new output class has these properties.

- data—Result data set.
- done—Specifies whether the guery is done (true) or not (false).
- endTime—Query end time.
- metadata—Result metadata set.
- queryId—Query ID.
- rowCount—Number of rows in the result data set.
- startTime—Query start time.

# Salesforce Order Management

## ${\tt ConnectApi.MultipleFulfillmentOrderInvoicesOutputRepresentation}$

This new output class is a subclass of ConnectApi.BaseOutputRepresentation and has this property.

• invoiceIds—List of IDs of the Invoices created by this call.

#### ConnectApi.ReturnItemsOutputRepresentation

This new output class is a subclass of ConnectApi.BaseOutputRepresentation and has these properties.

- changeOrderId—ID of the change order representing the ReturnOrderLineItem processing performed by this call.
- returnLineItemSplits—A list of properties representing any remaining quantities from partial returns processed by this call. Each element of the list includes the ID of a split ReturnOrderLineItem and the ID of the partially processed ReturnOrderLineItem whose remaining quantity it holds.

# ConnectApi.ReturnOrderItemSplitLineOutputRepresentation

This new output class is a subclass of ConnectApi.BaseOutputRepresentation and has these properties.

- newReturnOrderItemId—ID of the new ReturnOrderLineItem that holds the remaining return quantity.
- originalReturnOrderItemId—ID of the original ReturnOrderLineItem.

# ConnectApi.ReturnOrderOutputRepresentation

This new output class is a subclass of ConnectApi.BaseOutputRepresentation and has this property.

• returnOrderId—ID of the ReturnOrder created by this call.

# 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 Reference Guide.

## ConnectApi.CommerceSearchAttributeType

This new enum has these values.

- Custom
- ProductAttribute
- ProductCategory
- Standard

#### ConnectApi.CommerceSearchFacetDisplayType

This new enum has these values.

- CategoryTree
- DatePicker
- MultiSelect
- SingleSelect

#### ConnectApi.CommerceSearchFacetType

This new enum has this value.

DistinctValue

#### ConnectApi.CommerceSearchGroupingOption

This new enum has these values.

- NoGrouping—Search results aren't grouped.
- VariationParent—Search results are grouped by the variation parent.

#### ConnectApi.CommerceSearchIndexCreationType

This new enum has these values.

- Manual
- Scheduled

## ConnectApi.CommerceSearchIndexStatus

This new enum has these values.

- Completed
- Failed
- InProgress

#### ConnectApi.CommerceSearchIndexUsage

This new enum has these values.

- Live
- OutOfUse

## ${\tt ConnectApi.CommerceSearchSortRuleDirection}$

This new enum has these values.

- Ascending—Sorts in ascending alphanumeric order (A–Z, 0–9).
- Default—If there isn't an ascending or descending direction, sorts in default order. For example, sorting by relevancy.
- Descending—Sorts in descending alphanumeric order (Z–A, 9–0).

# ConnectApi.CommerceSearchSortRuleType

This new enum has these values.

- Custom—Custom field or non-product object sort rule.
- ProductBased—Product sort rule.
- Relevancy—Relevancy sort rule.

#### ConnectApi.CommerceSearchTopProductType

This new enum has this value.

VariationParent

#### ConnectApi.NavigationMenuItemActionType

This new enum has these values.

Event—Event-based navigation.



Note: Event is internal only and can't be used in custom components.

- ExternalLink—URL outside of your Experience Cloud site.
- InternalLink—Relative URL inside your Experience Cloud site.

#### ConnectApi.NavigationMenuItemOpenTarget

This new enum has these values.

- CurrentWindow—Navigation menu item opens in the current window.
- NewWindow—Navigation menu item opens in a new window.

#### ConnectApi.NavigationMenuItemType

This new enum has these values.

- Event—Event, such as logging in, logging out, or switching accounts.
- ExternalLink—URL outside of your site.
- GlobalAction—Lets users create records that aren't related to other records.
- InternalLink—Relative URL inside your site.
- MenuLabel—Menu label.
- Navigational Topic Dropdown list with links to the navigational topics in your site.
- SalesforceObject—Objects such as accounts, cases, contacts, and custom objects.
- SystemLink—System link, such as a link to Builder, Workspaces, or Setup.

## ConnectApi.OrderShipmentItemSort

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.OrderShipmentSort

This new enum has these values.

- ExpectedDeliveryDateAsc—Sorts by the oldest expected delivery date.
- ExpectedDeliveryDateDesc—Sorts by the most recent expected delivery date.
- ShipmentNumberAsc—Sorts by shipment number in ascending order (0-9).
- ShipmentNumberDesc—Sorts by shipment number in descending order (9–0).

# API: New and Changed Items

Access more data objects and metadata types in API version 52.0.

#### IN THIS SECTION:

# New and Changed Objects

Access more data through these new and changed standard objects.

# New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

#### **REST API**

REST API includes improved error handling and improved duplicate rule management.

#### Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Take advantage of new B2B Commerce for Lightning functionality, including order shipments, quantity rule information, and search sort rules and suggestions. Get Einstein Article and Einstein Reply Recommendations runtime metrics.

#### Tableau CRM REST API

Group and share Tableau CRM resources as collections using the Tableau CRM REST API. Retrieve asset schedules. Get datasets and recipes by licenseType.

#### User Interface API

Get the save options for a record layout.

#### Bulk API 2.0

Bulk API 2.0 documentation gets a new home! Both Bulk Developer Guides have been consolidated into an easier to use Guide.

#### Tooling API New and Changed Objects

Tooling API includes new and changed objects and fields.

## Metadata API

Metadata API includes new and changed types and fields.

# New and Changed Objects

Access more data through these new and changed standard objects.

## Salesforce Overall

#### Get information on the number of feature licenses that are active, assigned, or available in an org.

Use the new ActiveFeatureLicenseMetric object.

## Get information on the number of permission set licenses that are active or assigned in an org.

Use the new ActivePermSetLicenseMetric object.

## Get information on the number of profiles that are active or assigned in an org.

Use the new ActiveProfileMetric

## Learn more about your in-app guidance errors and warnings

Use the new PromptError object.

#### Determine who is allowed to share a PromptError

Use the new PromptErrorOwnerSharingRule object.

# See who has access to a PromptError

Use the new PromptErrorShare object.

#### Point to specific elements on a page with targeted prompts (beta)

To choose from more prompt types, use the new DisplayType field on the PromptVersion object.

# Position and associate targeted prompts to page elements (beta)

To determine where to place a targeted prompt, use the new ElementRelativePosition and ReferenceElementContext fields on the PromptVersion object.

# **Analytics**

# Query Analytics assets by license type

Use the new AnalyticsLicensedAsset object.

# **AppExchange**

#### Reduce the download size and time of your AppExchange App Analytics results files

Use the new FileType and FileCompression fields on the AppAnalyticsQueryRequest object. To optimize your overall query strategy, read AppExchange App Analytics Best Practices.

# Create AppExchange App Analytics catch-up queries to retrieve late-arriving data

Create a catch-up query by rerunning an AppExchange App Analytics query. Include the new AvailableSince field on the AppAnalyticsQueryRequest object set to the date and time that you ran your original query. To look up the date and time, use your original query's AppAnalyticsQueryRequest ID to retrieve the new QuerySubmittedTime field on the AppAnalyticsQueryRequest object. Learn more about catch-up queries in AppExchange App Analytics Best Practices.

# Usage Metrics is being retired

Usage Metrics and the MetricsDataFile API object are scheduled for retirement in Winter '22. Switch now to AppExchange App Analytics, which provides richer usage data about how subscribers interact with your AppExchange solutions.

# Commerce Order Management

# Identify the specific promotions applied to order items.

Use the new AdjustmentCauseId field on the OrderAdjustmentGroupSummary and OrderItemAdjusmentLineSummary objects.

#### Apply ranking to promotions.

Use the new Priority field on the OrderItemAdjusmentLineSummary object.

#### Indicate that a return is in process.

Use the new ReturnInitiated option in the Status field on the OrderItemSummary object.

# View the purchase order date associated with an Order Summary.

Use the new PODate field on the OrderSummary object.

# View the total number of unique products ordered on an Order Summary.

Use the new OrderProductLineCount field on the OrderSummary object.

# **Commerce Payments**

# Record encrypted payment method tokens on card payment methods and digital wallets.

Use the new Gateway Token Encrypted field on card payment methods and digital wallets.

GatewayTokenEncrypted uses Salesforce Classic Encryption to store the value of the payment method token. We recommend using this field instead of the digital wallet and card payment method's GatewayToken field, which isn't encrypted.

# Customization

# Select the date that the assignment of the permission set expires for specified users

Use the new ExpirationDate field on the PermissionSetAssignment object.

# Indicate whether the permission set assignment is active

Use the new IsActive field on the PermissionSetAssignment object.

# Query background operations by type

Use the new Type field on the BackgroundOperation object.

#### Einstein Automate

# Get the flow version ID of a flow interview

Use the new FlowVersionViewId field on the FlowInterview object.

# **Event Monitoring**

#### **Get Information About User Type**

Use the new USER\_TYPE field in some event log files types, which can, for example, tell you whether the user associated with an event is authenticated or is a guest user.

These event log file types include a USER TYPE field.

- Apex REST API
- Apex SOAP
- Apex Trigger
- API
- Asynchronous Report
- Aura Request
- Console
- Login
- Multiblock Report
- One Commerce Usage
- Queued Execution
- Report
- REST API
- Sites
- URI
- Visualforce Request

#### Review API version use with API Total Usage event type

Use the new API Total Usage Event in the EventLogFile object. This event type helps you review which API versions are in use and manage version retirements.

# **Experience Cloud**

# Add the ContentDocumentLink object to your layouts

The ContentDocumentLink object attribute layoutable is now true.

# **Enable the Experience Builder-based Service Not Available Page**

Set the OptionsExperienceBundleBasedSnaOverrideEnabled field on the existing Networks object to true.

# **Functions**

#### Understand which Salesforce Functions are available in your org

Use the new FunctionReference object to inspect which Functions your org is connected to.

Use the new FunctionInvocationRequest object to get the status of Function invocations from your org.

# Check the status of your org's connection to Salesforce Functions

Use the new SfFunctionsConnection object to inspect how your org is connected to Salesforce Functions.

# Industry Cloud: Insurance

#### Calculate commission values for a commissionable event

Use the new CommissionSchedule object.

#### Calculate the commission applicable to a specific product or producer for one or multiple commissionable events

Use the new CommissionScheduleAssignment object.

#### Do more with producer commissions

The ProducerCommission object has new fields related to the CommissionSchedule and CommissionScheduleAssignment objects, including CommissionScheduleId, MaxCommissionAmount, MinCommissionAmount, ParentProducerCommissionId, ProcessingProducerId, and ProducerProductionCode.

#### Use insurance policies across Salesforce orgs

The Vlocity and Salesforce InsurancePolicy objects are harmonized in the Salesforce core. Standard fields replace most custom fields. Because the Vlocity Product model isn't currently in the Salesforce core, three custom fields remain: AttributesSelectedValues\_\_c, ContractLineItemId\_\_c, and ProductCode\_\_c.

# Sales

# Learn how your opportunity's close date, amount, stage name, and forecast category changed over time

Use the new RecentFieldChange and FieldChangeSnapshot objects.

# Learn about recent stage and activity updates, and opportunity age

Use the new AgeInDays, LastActivityInDays, LastStageChangeDate, and LastStageChangeInDays fields on the Opportunity object. Requires enabling Pipeline Inspection to access the fields on opportunities, except for the LastStageChangeDate field.

#### Get more options for creating and managing forecast types

Use the new ForecastingSourceDefinition and ForecastingTypeSource objects.

On the ForecastingType object, use the new IsPlatformType field and the new delete() attribute.

# See which ForecastingItem records were updated or deleted in a given time period

On the Forecasting Item object, use the new getUpdated() and getDeleted() attributes.

# **Create Flows on content notes**

Use the new lookup field LatestContentId on the ContentNote object.

#### Specify which SASL mechanism Salesforce uses for SMTP authentication

Use the new AuthType field on the existing EmailRelay object.

# Security and Identity

#### Control the allowed cookie types for a site

Use the new OptionsCookieConsent field on the Site object.

# Redirect system-managed site URLs to your custom domain

Use the new OptionsRedirectToCustomDomain field on the Site object.

#### Choose how to cache your site's Visualforce pages

Use the new OptionsCachePublicVFPagesInProxyServers field on the Site object.

# Allow your domain to be eligible for HSTS preloading registration

Use the new OptionsHstsPreload field on the Domain object.

# REMOVED: The OptionsCspUpgradeInsecureRequests and OptionsRequireHttps fields on the Site object have been removed

These fields are removed in API version 52.0 and later. In API version 51.0 and earlier, the value in the field is ignored.

#### Service

# Access the new After Conversation Work feature (beta) from your agent work

Use the new AfterConversationActualTime field on the AgentWork object. The descriptions of ActiveTime and HandleTime were also updated.

#### Access the new After Conversation Work feature (beta) from a service channel

Use the new AfterConvoWorkMaxTime and HasAfterConvoWorkTimer fields on the ServiceChannel object.

# Specify the source type for a voice call

Use the new SourceType field on the VoiceCall object.

# View the status of Service Setup Assistant tasks

Use the new ServiceSetupProvisioning object. This object is accessible if the Service Setup Assistant has been turned on.

#### Enable a permission to access conversation entries for Chat

To use the ConversationEntry object for Chat, enable the new Access Conversation Entries user permission.

#### Notify the customer of a mobile worker approaching the service appointment

Use the new ApptAssistantInfoUrl and LocationStatus fields on the AssignedResource object.

#### Create work plans for consistent and focused service delivery for Field Service

Use the new WorkPlan, WorkPlanSelectionRule, WorkPlanTemplate, WorkPlanTemplateEntry, WorkStep, WorkStepStatus, WorkStepTemplate objects.

#### Create a workload history and intelligent forecast to plan for your contact center's future work volume

Use the new Workload, WorkloadUnit, WorkforceCapacity, WorkDemographic, and WorkforceCapacityUnit objects.

# Put the right agent on the right shift at the right time with Workforce Engagement's shift scheduling features

Use the new SchedulingConstraint, SchedulingRule, SchedulingRuleParameter, and ServiceResourcePreference objects.

# Assign MyTrailhead learning modules to agents, who earn skills upon completion

Use the new SkillLevelDefinition, and SkillLevelProgress objects.

# Use relational operators to define service appointment criteria for shifts for Field Service

Use the new FilteredObject and SourceObject fields on the RecordsetFilterCriteria object and the Operator field on the RecordsetFilterCriteriaRule object. Use the updated picklist values of the CriteriaField field on the RecordsetFilterCriteriaRule object.

#### **View your Field Service org settings**

Use the new FieldServiceOrgSettings object.

# Work.com

#### View the details of an employee-user provisioning process.

Use the new EmpUserProvisioningProcess and EmpUserProvisionProcessErr objects to view the details of an employee-user provisioning process.

# Map a knowledge article record type to a single ticket category.

Use the new AssociatedKnowledgeArticleTypeMapping object to map a knowledge article record type to a single ticket category.

# 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.

# Development

# Identify platform event messages

Use the new EventUuid field in all standard and custom platform events. If you published the event message and received the UUID in the SaveResult, use this field to match the published and delivered event messages.

# Security and Identity: Real-Time Event Monitoring

# Monitor changes to permission sets and permission set groups (pilot)

Use the new PermissionSetEventStore object in a security policy and PermissionSetEvent for real-time notifications.

# **REST API**

REST API includes improved error handling and improved duplicate rule management.

#### BEHAVIOR CHANGE: Improved error handling for composite requests

The behavior of the API for composite requests that contain illegal characters (anything besides letters, number, and underscores) in the reference IDs has changed.

- In API version 52.0 and later, the entire request now fails with a 400 HTTP status code. (In previous releases, subrequests that used illegal characters succeeded but all dependent subrequests failed.)
- Starting with this Summer '21 release, if a request uses API version 51.0 or earlier, reference IDs in the response are no longer truncated if they contain '(' or '['.

# This change affects

- /services/data/vXX.X/composite
- /services/data/vXX.X/composite/graph

For more information, see Composite Subrequest Result in the REST API Developer Guide.

#### Control how duplicate records are managed by configuring duplicate rule options

Use the duplicate rule header in the REST API. This header provides the same functionality as the SOAP API's DuplicateRuleHeader.

When a user creates, updates, or upserts a record, they sometimes create a duplicate of an existing record. Use Duplicate Rule Management to create matching rules that indicate how duplicate records are detected. Specify whether to block the creation of duplicate records, or allow the user to acknowledge a warning and create the duplicate. Indicate whether the current user's sharing rules or the system sharing rules are used when looking for duplicate records.

# **Changed Calls**

These calls are changed in API version 52.0.

# Changed Calls

#### /limits

The DailyApiRequests section of the /limits response body has been simplified. Since the information was incomplete, the response no longer shows usage broken down by the different connected apps. This section now appears like this:

```
"DailyApiRequests" : {
    "Max" : 15000,
    "Remaining" : 4667
},
```

# /composite

The behavior of /composite has been improved.

- Only fields that are explicitly selected in the parent request are available for use in dependent subrequests.
- Null-value fields are now accessible in dependent subrequests (assuming those fields are explicitly selected in the parent request).

These changes apply when version 52.0 is specified in the /composite request itself. The versions specified in the urls parameters in the request don't affect this.

# Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Take advantage of new B2B Commerce for Lightning functionality, including order shipments, quantity rule information, and search sort rules and suggestions. Get Einstein Article and Einstein Reply Recommendations runtime metrics.

#### 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 Reference Guide: ConnectApi Namespace

# New and Changed Connect REST API Resources

These resources are new or have changes.

# B2B Commerce for Lightning

#### **Get order shipments**

Make a GET request to the new /commerce/webstores/webstoreId/order-summaries /orderSummaryId/shipments resource.

#### **Get shipment items**

Make a GET request to the new /commerce/webstores/webstoreId/shipments/shipmentId/items resource.

# Get product categories

Make a GET request to the new /commerce/webstores/webstoreId/product-categories/children resource.

# Get quantity rule information for a product

Make a GET request to the /commerce/webstores/webstoreId/products/productId resource.

#### Get sort rules for the live index

Make a GET request to the new /commerce/webstores/webstoreId/search/sort-rules resource.

# Get suggestions for product searches

Make a GET request to the new /commerce/webstores/webstoreId/search/suggestions resource.

#### B2B2C Commerce

#### Import a product catalog to a B2B or B2C store using a .csv file

Make a POST request to the new /commerce/management/webstores/webstoreId/product-import resource with the new Product Import Input request body.

#### Commerce Einstein

#### Get the status of a Commerce Einstein deployment for a store

Make a GET request to the new /commerce/einstein/webstores/webstoreId/status resource.

#### Get the Commerce Einstein configuration for a store

Make a GET request to the new /commerce/einstein/webstores/webstoreId/configuration resource.

#### Enqueue a job to export Commerce Einstein activity for a store

 $\label{lem:makeapost} \textit{Make a POST request to the new / commerce/einstein/webstores/\textit{webstoreId}/\text{activities/export-jobs resource} \ \textit{with the new Commerce Einstein Activity Job Input.}$ 

#### Get the status of a Commerce Einstein activity export job for a store

Make a GET request to the new

/commerce/einstein/webstores/webstoreId/activities/export-jobs/jobId resource.

# Download an exported Commerce Einstein activity file for a store

Make a GET request to the new

/commerce/einstein/webstores/**webstoreId**/activities/export-jobs/**jobId**/file-content resource.

#### Enqueue a job to purge Commerce Einstein activity for a store

Make a POST request to the new /commerce/einstein/webstores/**webstoreId**/activities/purge-jobs resource with the new Commerce Einstein Activity Job Input.

# Get the status of a Commerce Einstein activity purge job for a store

Make a GET request to the new

 $/ \verb|commerce|/ einstein/webstores|/ \textit{webstoreId}/ | activities/purge-jobs/\textit{jobId}| resource.$ 

Einstein Recommendations

# Get Einstein Article Recommendations runtime metrics for the case channel type

Make a GET request to the new /connect/article-recommendations/metrics/runtime/case resource.

# Get Einstein Reply Recommendations runtime metrics for the chat channel type

Make a GET request to the new /connect/reply-recommendations/metrics/runtime/chat resource.

Salesforce Customer Data Platform (CDP)

#### Get all Salesforce CDP metadata

Make a GET request to the new /ssot/metadata resource.

#### Get Salesforce CDP metadata for data model objects in the profile category

Make a GET request to the new /ssot/profile/metadata resource.

# Get Salesforce CDP metadata for a data model object in the profile category

Make a GET request to the new /ssot/profile/metadata/dataModelName resource.

# Query a Salesforce CDP Profile data model object using filters

Make a GET request to the new /ssot/profile/dataModelName resource.

# Query a Salesforce CDP Profile data model object using filters and a search key

Make a GET request to the new /ssot/profile/dataModelName/id resource.

# Query a Salesforce CDP Profile data model object and a child object using filters and a search key

Make a GET request to the new /ssot/profile/dataModelName/id/childDataModelName resource.

# Query a Salesforce CDP Profile data model object and a Calculated Insight object using filters and a search key

Make a GET request to the new /ssot/profile/dataModelName/id /calculated-insights/calculatedInsightName resource.

# Synchronously guery Salesforce CDP data across data model, lake, unified, and linked objects

Make a POST request to the new /ssot/query resource with the new Salesforce CDP Query Input request body.

# **Get Salesforce CDP Insight metadata**

Make a GET request to the new /ssot/insight/metadata resource.

#### Get Salesforce CDP metadata for a Calculated Insight object

Make a GET request to the new /ssot/insight/metadata/calculatedInsightName resource.

# **Query a Salesforce CDP Calculated Insight object**

Make a GET request to the new /ssot/insight/calculated-insights/calculated-insight-name resource.

Salesforce Order Management

# Create Invoices for multiple FulfillmentOrders

Make a POST request to the new

/commerce/fulfillment/fulfillment-orders/actions/create-multiple-invoices resource with the new Multiple Fulfillment Order Invoices Input request body.

#### **Create ReturnOrders**

Make a POST request to the new /commerce/returns/return-orders resource with the new Return Order Input request body.



Note: This resource was available but undocumented in version 50.0.

#### Process ReturnOrderLineItems

Make a POST request to the new

/commerce/returns/return-orders/returnOrderId/actions/return-items resource with the new Return Items Input request body.

# New and Changed Connect REST API Request Bodies

These request bodies are new or have changes.

# B2B Commerce for Lightning

# Product Search Grouping Input (Generally Available)

This 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 these new properties.

- grouping (generally available)—Specifies whether to group products in search results and how to group them.
- includeQuantityRule—Specifies whether to include purchase quantity rule information for products in search results (true) or not (false). If unspecified, defaults to false.
- sortRuleId—ID of the sort rule that specifies the order of products in the search results.

# B2B2C Commerce

# **Product Import Input**

This new request body has these properties.

- allOrNone—Specifies whether to stop processing if any row was not able to import (true) or to continue processing for
  a partial import (false).
- commerceEntitlementPolicyId—ID of the entitlement policy to import to.
- contentVersionId—Content version ID of the .csv file.
- pricebookId—ID of the pricebook to import to.
- productCatalogId—ID of the product catalog to import to.
- sampleData—Sample .csv file to import. Values are:
  - B2BSampleData—B2B sample data set.
  - Camera—Camera store sample data set.
  - Coffee—Coffee store sample data set.
  - Hardware—Hardware store sample data set.
  - NorthernTrail—Outdoor goods store sample data set.
  - NorthernTrailLarge—Larger outdoor goods store sample data set.
  - Simple—Two-product sample data set.

• strikethroughPricebookId—ID of the strikethrough pricebook to import to.

#### Commerce Einstein

# **Commerce Einstein Activity Job Input**

This new request body has these properties.

- cookieId—ID of the cookie.
- userId—ID of the user.

#### Conversations

# **Conversation Entry Update Input**

This request body has this new property.

• relatedRecords—List of IDs of records to associate with the conversation entry.

# Einstein Conversation Insights

# **Connectors Call Input**

This request body has this new property.

- sourceType—Specifies whether a call is related to a sales or service use case. Values are:
  - Sales
  - Service

Values are case-sensitive. If no value is provided, it is set to "Sales" by default.

# **Experience Cloud Sites**

# **Community Input**

This request body has this new property.

• templateParams—Map of template-specific parameters.

# Field Service

# **Shifts from Pattern Input**

This request body has this new property.

- status—Status of the shifts. Default values are:
  - Confirmed
  - Published
  - Tentative

# Salesforce CDP

# Salesforce CDP Query Input

This new request body has this property.

• sql—ANSI-standard SQL query.

Salesforce Order Management

# **Multiple Fulfillment Order Invoices Input**

This new request body has this property.

• fulfillmentOrderIds—The FulfillmentOrders to create Invoices for.

#### **Return Items Input**

This new request body has these properties.

- returnOrderItemDeliveryCharges—List of ReturnOrderLineItems to return that represent delivery charges.
- returnOrderItems—List of ReturnOrderLineItems to process that represent products, along with data about how to process them.

# **Return Order Input**

This new request body has these properties.

- orderSummaryId—ID of the OrderSummary containing the items to be returned. The OrderSummary's OrderLifeCycleType
  must be Managed.
- returnOrderLifeCycleType—The LifeCycleType of the ReturnOrder. Possible values are:
- returnOrderLineItems—List of data for creating ReturnOrderLineItems.
- status—Status to assign the ReturnOrder. This value must match an entry in the ReturnOrder object's Status picklist.

# **Return Order Item Delivery Charge Input**

This new request body has this property.

returnOrderLineItemId—ID of a ReturnOrderLineItem to return.

#### **Return Order Item Input**

This new request body has these properties.

- quantityReceived—The quantity of the ReturnOrderLineItem that has been received. The value must be zero or greater. This value isn't used by any standard features, but is provided for use in customizations.
- quantityRejected—The quantity of the ReturnOrderLineltem that has been rejected for return. The value must be zero or greater. This value isn't used by any standard features, but is provided for use in customizations.
- quantityReturned—The quantity of the ReturnOrderLineltem that has been returned. The value must be greater than zero. If this value plus quantityToCancel is less than the expected return quantity, then the remaining quantity to be returned is added to a new ReturnOrderLineltem.
- quantityToCancel—The quantity of the ReturnOrderLineItem to remove because it's not being returned. The value must be zero or greater. If this value plus quantityReturned is less than the expected return quantity, then the remaining quantity to be returned is added to a new ReturnOrderLineItem.
- reasonForRejection—The reason why the rejected quantity, if any, was rejected. This value isn't used by any standard features, but is provided for use in customizations.
- returnOrderLineItemId—The ID of the ReturnOrderLineItem.

#### **Return Order Line Item Input**

This new request body has these properties.

- canReduceShipping—Whether the associated shipping charge can be refunded.
- orderItemSummaryId—ID of the associated OrderItemSummary.
- quantityExpected—Quantity expected to be returned.
- quantityReceived—Quantity already physically returned.
- reasonForReturn—Reason for the return. The value must match an entry in the ReturnOrderLineItem object's ReasonForReturn picklist.

# New and Changed Connect REST API Response Bodies

These response bodies are new or have changes.

# B2B Commerce for Lightning

#### Cart Item

This response body has this new property.

• itemizedAdjustmentAmount—Reserved for future use.

#### **Cart Item Product**

This response body has this new property.

• purchaseQuantityRule—If one exists, purchase quantity rule for the product.

# **Cart Summary**

This response body has this new property.

- totalProductAmountAfterAdjustments—Total product amount.
- totalPromotionalAdjustmentAmount—Reserved for future use.

#### **Order Shipment**

This new response body has these properties.

- expectedDeliveryDate—Expected delivery date for the shipment.
- fields—Map of requested fields.
- orderSummaryId—ID of the order summary.
- shipmentId—ID of the shipment.
- shipmentNumber—Number of the shipment.
- status—Status of the shipment.

# **Order Shipment Collection**

This new response body has these properties.

- count—Total number of records returned in the collection.
- currentPageToken—Token identifying the current page of order shipments.
- current PageUrl—URL to the current page of order shipments.
- nextPageToken—Token identifying the next page of order shipments.
- nextPageUrl—URL to the next page of order shipments.
- previousPageToken—Token identifying the previous page of order shipments.
- previousPageUrl—URL to the previous page of order shipments.
- shipments—Collection of order shipments.
- sortOrder—Sort order for order shipments. Values are:
  - ExpectedDeliveryDateAsc—Sorts by the oldest expected delivery date.
  - ExpectedDeliveryDateDesc—Sorts by the most recent expected delivery date.
  - ShipmentNumberAsc—Sorts by shipment number in ascending order (0-9).
  - ShipmentNumberDesc—Sorts by shipment number in descending order (9-0).

#### **Order Shipment Item**

This new response body has these properties.

- fields—Map of requested fields.
- orderItemSummaryId—ID of the order item summary.
- product—Product mapped to an order item summary.
- productId—ID of the product.
- quantity—Quantity of the product.
- shipmentId—ID of the shipment.
- shipmentItemId—ID of the shipment item.

# **Order Shipment Item Collection**

This new response body has these properties.

- count—Total number of records returned in a page.
- currentPageToken—Token identifying the current page of order shipment items.
- currentPageUrl—URL to the current page of order shipment items.
- items—Collection of order shipment items.
- nextPageToken—Token identifying the next page of order shipment items.
- nextPageUrl—URL to the next page of order shipment items.
- previous PageToken—Token identifying the previous page of order shipment items.
- previousPageUrl—URL to the previous page of order shipment items.
- sortOrder—Sort order for order shipment items. Values are:
  - IdAsc—Sorts by ID in ascending alphanumeric order (A−Z, 0−9).
  - IdDesc—Sorts by ID in descending alphanumeric order (Z-A, 9-0).

#### **Product Category Detail Collection**

This new response body has this property.

productCategories—List of product category details.

# **Product Detail**

This response body has this new property.

purchaseQuantityRule—If one exists, purchase quantity rule for the product.

# **Product Search Suggestions Results**

This new response body has this property.

recentSearchSuggestions—Suggestions based on the user's recent searches.

#### **Product Summary**

This response body has this new property.

• purchaseQuantityRule—If one exists, purchase quantity rule for the product.

#### **Purchase Quantity Rule**

This new response body has these properties.

- increment—Increment value of the quantity that can be purchased.
- maximum—Maximum quantity that can be purchased.
- minimum—Minimum quantity that can be purchased.

# **Search Suggestion**

This new response body has this property.

value—Search suggestion.

#### **Sort Rule**

This new response body has these properties.

- direction—Direction of the sort rule. Values are:
  - Ascending—Sorts in ascending alphanumeric order (A–Z, 0–9).
  - Default—If there isn't an ascending or descending direction, sorts in default order. For example, sorting by relevancy.
  - Descending—Sorts in descending alphanumeric order (Z-A, 9-0).
- label—Label of the sort rule.
- nameOrId—Name of the sort rule field or, if the sort rule is based on a custom field, ID.
- sortRuleId—ID of the sort rule.
- type—Type of sort rule. Values are:
  - Custom—Custom field or non-product object sort rule.
  - ProductBased—Product sort rule.
  - Relevancy—Relevancy sort rule.

#### **Sort Rules Collection**

This new response body has this property.

sortRules—Collection of sort rules.

#### B2B2C Commerce

# **Product Import**

This new response body has these properties.

- allOrNone—Specifies whether to stop processing if any row was not able to import (true) or to continue processing for a partial import (false).
- commerceEntitlementPolicyId—ID of the entitlement policy imported to.
- commerceEntitlementProductsCreated—Number of entitlement products created by the import.
- contentVersionId—ID of the .csv file that was imported.
- endTime—Unix epoch timestamp when the import finished.
- errorMessage—If the import failed, the error message.
- numberError—Number of .csv records that failed to process.
- numberSuccess—Number of .csv records that processed successfully.
- numberToProcess—Number of .csv records in the data source.
- pricebookEntriesCreated—Number of pricebook entries created by the import.
- pricebookEntriesUpdated—Number of pricebook entries updated by the import.
- pricebookId—ID of the pricebook imported to.
- processTime—Unix epoch timestamp of how long the import process took.
- productCatalogId—ID of the product catalog imported to.
- productCategoriesCreated—Number of product categories created by the import.
- productCategoryProductsCreated—Number of product category products created by the import.
- productsCreated—Number of products created by the import.

- productsUpdated—Number of products updated by the import.
- sampleData—Sample.csv file that was imported. Values are:
  - B2BSampleData—B2B sample data set.
  - Camera—Camera store sample data set.
  - Coffee—Coffee store sample data set.
  - Hardware—Hardware store sample data set.
  - NorthernTrail—Outdoor goods store sample data set.
  - NorthernTrailLarge—Larger outdoor goods store sample data set.
  - Simple—Two-product sample data set.
- startTime—Unix epoch timestamp when the import started.
- startedBy—ID of the user of who started the import.
- status—Status of the import.
- webstoreId—ID of the store imported to.

# CMS Managed Content

# **Managed Content Channel**

This response body has these changed and new properties.

- domain—ID or name of the domain assigned to the channel.
- domainId—This property is no longer available. This information is returned in the new domain property.

#### Commerce Einstein

#### **Commerce Einstein Activity Export Job**

This new response body has these properties.

- fileUrl—URL to download the export file after the job completes.
- fileUrlExpiration—Expiration date of the file download URL, which is 30 days after the job completes.
- jobId—ID of the job.
- statusCode—Status code for the job. Values are:
  - Completed—Job completed.
  - NoData—Export job completed with no data.
  - Pending—Job is in progress.
- url—URL to the job resource.

# **Commerce Einstein Activity Purge Job**

This new response body has these properties.

- jobId—ID of the job.
- statusCode—Status code for the job. Values are:
  - Completed—Job completed.
  - NoData—Export job completed with no data.
  - Pending—Job is in progress.
- url—URL to the job resource.

# **Commerce Einstein Configuration**

This new response body has these properties.

- activityTrackingEnabled—Specifies whether activity tracking is enabled for the site (true) or not (false).
- host—Host name for Commerce Einstein APIs.
- siteId—Site ID for Commerce Einstein.
- tenant—Tenant identifier for Commerce Einstein.

#### **Commerce Einstein Status**

This new response body has these properties.

- statusCode—Status code for the deployment. Values are:
  - DataError
  - InProgress
  - InternalError
  - NotDeplyed
  - Success
- url—URL to the status resource.

#### Conversations

# **Conversation Entry**

This response body has this new property.

relatedRecords—List of IDs of records related to the conversation entry.

#### Einstein Recommendations

#### **Article Recommendations Runtime Metric**

This new response body has these properties.

- activeUserCount—Number of agents who had recommendations displayed.
- attachCount—Number of times recommendations were attached.
- detachCount—Number of times recommendations were detached.
- dismissCount—Number of times recommendations were dismissed.
- engagementCount—Number of times recommendations were clicked to open, hovered, attached, detached, and dismissed.
- engagementUserCount—Number of agents who clicked to open, hovered, attached, detached, and dismissed recommendations.
- hoverOrOpenCount—Number of times recommendations were clicked to open or hovered.
- metricsDate—Date of metrics computation.
- recommendationCount—Number of recommendations displayed.
- recommendationDisplayedRecordsCount—Number of records where recommendations were displayed.
- recommendationEngagementRecordsCount—Number of records where agents clicked to open, hovered, attached, detached, and dismissed recommendations.

#### **Article Recommendations Runtime Metrics**

This new response body has this property.

articleRecommendationsRuntimeMetrics—Collection of article recommendations metrics.

# **Reply Recommendations Metric**

This new response body has these properties.

- activeAgentCount—Number of agents who were shown recommendations (MAU).
- agentsEngaged—Number of agents who interacted with a recommendation.
- conversationsCount—Number of unique conversations in which recommendations were served.
- conversationsWithEngagements—Number of distinct conversations that used the recommendation (post or edit interactions).
- metricsDate—Date of metrics computation.
- recommendationsCount—Number of recommendations displayed to agents.
- recommendationsEditCount—Number of times agents edited a recommendation.
- recommendationsNotHelpfulCount—Number of times agents indicated that a recommendation was not helpful.
- recommendationsPostCount—Number of times agents posted a recommendation.

# **Reply Recommendations Metrics**

This new reponse body has this property.

replyRecommendationsRuntimeMetrics—Collection of reply recommendations metrics.

# **Experience Cloud**

# Community

This response body has this new property.

• builderBasedSnaEnabled—Specifies whether the Service Not Available page is an auto-generated Experience Builder-based page (true) or a static resource page that's set in **Workspaces** > **Administration** > **Pages** (false).

# Personalization

# Formula Scope

This response body has these changed and new properties.

- contextValues—This property is no longer available. Use the contextValuesMap property instead.
- contextValuesMap—Map of context values for the scope.

# Salesforce CDP

# Salesforce CDP Query Metadata Output

This new response body has this property.

metadata—Metadata set.

# **Salesforce CDP Query Output**

This new response body has these properties.

- data—Result data set.
- done—Specifies whether the query is done (true) or not (false).
- endTime—Query end time.
- metadata—Result metadata set.
- queryId—QueryID.
- rowCount—Number of rows in the result data set.

• startTime—Query start time.

Salesforce Order Management

#### Multiple FulfillmentOrder Invoices Output

This new response body has this property.

invoiceIds—List of IDs of the created Invoices.

## **Return Items Output**

This new response body has these properties.

- changeOrderId—ID of the change order representing the ReturnOrderLineItem processing performed by this call.
- errors—Any errors that were returned.
- returnLineItemSplits—A list of properties representing any remaining quantities from partial returns processed by this call. Each element of the list includes the ID of a split ReturnOrderLineItem and the ID of the partially processed ReturnOrderLineItem whose remaining quantity it holds.
- success—Indicates whether the transaction was successful.

#### **Return Order Output**

This new response body has this property.

returnOrderId—ID of the created ReturnOrder.

# Tableau CRM REST API

Group and share Tableau CRM resources as collections using the Tableau CRM REST API. Retrieve asset schedules. Get datasets and recipes by licenseType.

#### 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 Response Bodies

These response bodies are new or have changes.

# New and Changed Tableau CRM REST API Resources

These resources are new or have changes.

#### Get Tableau CRM asset schedules

Make a GET request to the /wave/asset/assetId/schedule resource.

#### Get dashboards by ids

Make a GET request to the /wave/dashboards resource with the new ids request parameter.

#### Get a collection of Tableau CRM resources

Make a GET request to the new /wave/collections/ resource. Request parameters can be used to filter the results.

#### Create a new Tableau CRM collection

 $\label{thm:makeaPOST request to the new /wave/collections/resource with a \ waveCollectionInputRepresentation resource.$ 

#### Get the items in a collection of Tableau CRM resources

Make a GET request to the new /wave/collections/collectionId/items resource.

# Add a Tableau CRM resource item to an existing collection

Make a POST request to the new /wave/collections/collectionId/items resource with a WaveCollectionItemInputRepresentation resource.

# Update an existing Tableau CRM resource item in a collection

Make a PATCH request to the new /wave/collections/collectionId/items resource with a WaveCollectionItemListInputRepresentation resource.

#### Remove a Tableau CRM resource item from an existing collection

Make a DELETE request to the new /wave/collections/collectionId/items/collectionItemId resource.

# Get a dataset by license type

Make a GET request to the /wave/dataset resource with the new licenseType request parameter.

# Get a recipe by license type

Make a GET request to the /wave/recipes resource with the new licenseType request parameter.

# New and Changed Tableau CRM REST API Request Bodies

These request bodies are new or have changes.

#### Abstract Bucket Algorithm Input (AbstractBucketAlgorithmInputRepresentation)

The new request body has this property.

• type— The type of algorithm. Valid values are: Typographic Clustering.

# **Bucket Setup Input (BucketSetupInputRepresentation)**

The request body has this new property.

• algorithm— The bucketing algorithm.

# Compact Form Source Input (CompactFormSourceInputRepresentation)

The request body has this new property.

• filters— The compact form source column filters.

# DataConnectorInput (DataConnectorInputRepresentation)

The request body has this new property.

- connectorHandler The connector handler for the source connector. Valid values are:
  - Base
  - Legacy

#### Dynamic Data Input (DynamicDataInputRepresentation)

The request body has this new property.

richTextContext— The collection rich text content blocks.

#### Recipe Conversion Detail Input (RecipeConversionDetailInputRepresentation)

The new request body has these properties.

- conversionDetailId— The id of the conversion detail.
- message— The conversion detail message.
- nodeName— The name of the recipe node for the conversion detail.

• severity— The severity of the conversion detail. Valid values are: UserInfo and Warning.

#### Recipe Input (RecipeInputRepresentation)

The request body has this new property.

conversionDetails—The collection of conversion details.

# Rich Text Content Block Input (RichTextContentBlockInputRepresentation)

The new request body has these properties.

- attributes— A map of the text attribute values.
- insert— The text content.

#### Schema Field Input (SchemaFieldInputRepresentation)

The request body has this new property.

errorType— The error value to output.

# Sql Step Input (SqlStepInputRepresentation)

The request body has this new property.

• receiveFacetSource— The configurations for the receive facet source.

#### Time Series Input Confidence Interval High Low (TimeSeriesInputConfidenceIntervalHighLow)

The new request body has these properties.

- high— The high confidence interval.
- low— The low confidence interval.

# Time Series Parameters Input (TimeSeriesParametersInputRepresentation)

The request body has this new property.

• confidenceIntervalFields— A map of confidence interval fields.

# Typographic Cluster Input (TypographicClusterInputRepresentation)

The new request body has these properties.

- distanceThreshold— The edit distance threshold.
- ignoreCase—Indicates whether case is ignored (true) or not (false).

# Wave Collection Input (WaveCollectionInputRepresentation)

The new request body has these properties.

- color— The configured color for the collection.
- description— The description of the collection.
- label— The collection label.
- pins— The list of pins for the collection.
- shares— The list of sharing rules defined for the collection.
- type— The type of the collection. Valid values are: Static.

#### Wave Collection Item Input (WaveCollectionItemInputRepresentation)

The new request body has these properties.

- assetType— The asset type of the item to add to the collection. Valid values are: Dashboard and Lens.
- id— The id of the collection.

• itemId— The id of the item to add to the collection.

# Wave Collection Item List Input (WaveCollectionItemListInputRepresentation)

The new request body has this property.

items— The list of items in a collection.

# Wave Collection Pin Input (WaveCollectionPinInputRepresentation)

The new request body has these properties.

- pinnedFor— The id of the user or group the collection is pinned for.
- pinnedForType— The type the collection is pinned for. Valid values are: Group, Role, and User.
- type— The collection pin type where the pin rule is applicable. Valid values are: All, Desktop, and Mobile.

# New and Changed Tableau CRM REST API Response Bodies

These response bodies are new or have changes.

# Abstract Bucket Algorithm (AbstractBucketAlgorithmRepresentation)

The new response body has this property.

• type— The type of algorithm. Valid values are Typographic Clustering.

# Base Templated Asset Representation (BaseTemplatedAppRepresentation)

The new response body has these properties.

- templateAssetSourceName The name of the template the asset was created from.
- templateSourceId The id of the template the asset was created from.

# **Bucket Setup (BucketSetupRepresentation)**

The response body has this new property.

algorithm — The bucketing algorithm.

# Collection Pin (CollectionPinRepresentation)

The new response body has these properties.

- id The id of the collection pin rule.
- pinnedFor The id of the user or group the collection is pinned for.
- type The collection pin type where the pin rule is applicable. Valid values are: All, Desktop, and Mobile.

#### Compact Form Source (CompactFormSourceRepresentation)

The response body has this new property.

• filters — The compact form source column filters.

# Dataset (DatasetRepresentation)

The response body has these new properties.

- currentVersionSupportsNewDates Indicates whether the current version of the dataset supports the new date format (true) or not (false).
- licenseAttributes The Tableau CRM license attributes associated with the dataset.

# DataConnector (DataConnectorRepresentation)

The response body has this new property.

connectorHandler — The connector handler for the source connector. Valid values are:

- Base
- Legacy

# DataConnectorType (DataConnectorTypeRepresentation)

The response body has this new property.

- supportedConnectorHandlers The list of the supported connecter handlers. Valid values are:
  - Base
  - Legacy

# Dynamic Data (DynamicDataRepresentation)

The response body has this new property.

• richTextContext — The collection of rich text content blocks.

# Filter Parameters (FilterParametersRepresentation)

The response body has this new property.

• filterBooleanLogic — The filter boolean logic.

# Load Connected Dataset (LoadConnectedDatasetRepresentation)

The response body has this new property.

• filter — The pushdown filter.

# Recipe Collection (RecipeCollectionRepresentation)

The response body has these new properties.

- nextPageUr1 The URL to get the next page of contents in the collection.
- totalSize The total count of the elements in the collection.
- url The URL to get the collection.

# Recipe Conversion Detail (RecipeConversionDetailRepresentation)

The new response body has these properties.

- conversionDetailId The id of the conversion detail.
- message The conversion detail message.
- nodeName The name of the recipe node for the conversion detail.
- severity The severity of the conversion detail. Valid values are: UserInfo and Warning.

#### Recipe (RecipeRepresentation)

The response body has this new property.

 conversionDetails — The collection of upconversion details when converting the recipe format to R3 (Data Prep).

#### Rich Text Content Block (RichTextContentBlockRepresentation)

The new response body has these properties.

- attributes A map of the text attribute values.
- insert The text content.

# Schedule (ScheduleRepresentation)

The response body has this new property.

assetId — The asset id the schedule belongs to.

#### Schema Field (SchemaFieldRepresentation)

The response body has this new property.

errorType — The error value to output.

# Sql Step (SqlStepRepresentation)

The response body has this new property.

• receiveFacetSource — The configurations for the receive facet source.

#### Template (TemplateRepresentation)

The response body has these new properties.

- createdBy The user that created the template.
- createdDate The date and time the template was created.
- lastModifiedBy The user that last modified the template.
- lastModifiedDate The last date and time the template was modified.

# Time Series Output Confidence Interval High Low (TimeSeriesOutputConfidenceIntervalHighLow)

The new response body has these properties.

- high The high confidence interval.
- low The low confidence interval.

# Time Series Parameters (TimeSeriesParametersRepresentation)

The response body has this new property.

• confidenceIntervalFields — A map of confidence interval fields.

# Typographic Cluster (Typographic Cluster Representation)

The new response body has these properties.

- distanceThreshold The edit distance threshold.
- ignoreCase Indicates whether case is ignored (true) or not (false).

#### Wave Collection Item List (WaveCollectionItemListRepresentation)

The new response body has these properties.

- collectionItems The list of collection items.
- nextPageToken The next page token when there are more records.
- totalCount The total count of items in the list.

# Wave Collection Item (WaveCollectionItemRepresentation)

The new response body has these properties.

- assetType The asset type of the collection item.
- collectionItemId The id of the association between the collection item and the asset type.
- files The files of the collection item.
- folder The folder metadata of the collection item.
- visibility The asset visibility of the collection item.

# Wave Collection List (WaveCollectionListRepresentation)

The new response body has these properties.

- collections The list of collections.
- nextPageToken The next page token when there are more records.
- totalCount The total count of collections in the list.

# Wave Collection (WaveCollectionRepresentation)

The new response body has these properties.

- collectionType The type of the collection.
- color The configured color for the collection.
- isPinned Indicates whether the collection is pinned for the current user (true) or not (false).
- itemList. The list of items in the collection.
- itemsUrl The URL to the items in the collection.
- pins The list of pins for the collection.
- shares The list of sharing rules defined for the collection.

# Wave Features (WaveFeaturesRepresentation)

The response body has these new properties.

- canManageTemplatesInStudio Indicates whether template management via Tableau CRM Analytics Studio is enabled for the current user (true) or not (false).
- orgHasRecipeDirectData Indicates whether the current user can access data directly from recipes (true) or not (false).
- userHasInsightsAdmin Indicates whether the current user is a Tableau CRM admin (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/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.

#### Bulk API 2.0

Bulk API 2.0 documentation gets a new home! Both Bulk Developer Guides have been consolidated into an easier to use Guide.

# Consolidation of Bulk API 2.0 and Bulk API Documentation

We have consolidated the *Bulk API 2.0 Developer Guide* and *Bulk API Developer Guide* into one Developer Guide, named the *Bulk API 2.0* and *Bulk API Developer Guide*. In addition to the consolidation, some key enhancements include a comparison of the two APIs, a consolidated Limits section, and simpler navigation.

Where The new, consolidated Guide is located here: Bulk API 2.0 and Bulk API Developer Guide.

To find older versions of the Bulk API 2.0 documentation, see: Bulk API 2.0 Older Documentation.

# Client Field Returns Client ID String for Event Monitoring

Use the client field value in the Sforce-Call-Options request header to, for example, track clients calling the API in event log files.

How For details about using the Sforce-Call-Options request header, see:

Bulk API 2.0: Sforce Call Options Header

# Warning Header

Use the new Warning header for discovery of new warnings, such as the use of a deprecated version of the API.

**How** Check this header to see if there are actions you must take. For details, see

Bulk API 2.0: Warnings Header



Note: At this time, there may not be responses (warnings) that include this header.

#### Example header:

Warning: 299 - "This API is deprecated and will be removed by Summer '22. Please see https://help.salesforce.com/articleView?id=000351312 for details."

# Tooling API New and Changed Objects

Tooling API includes new and changed objects and fields.

#### Customization

# Control the visibility that users have to a field based on the field's compliance categorization

Use the new FieldRestrictionRule object.

# Control the access that specified users have to designated records (beta)

Use the new RestrictionRule object.

# Sales

#### Get more options for creating and managing forecast types

Use the new ForecastingSourceDefinition, ForecastingType, and ForecastingTypeSource objects.

# Control which object types and field types appear in the list of object details on the forecasts page

Use the new ForecastingTypeObjectListSettings, ForecastingObjectListLabelMapping, ForecastingObjectListSelectedSettings, ForecastingObjectListSettings, and ForecastingObjectListUnselectedSettings objects.

# Specify a range of IP addresses to include in or exclude from the specified feature

Use the new IPAddressRange object.

# Security and Identity

# View the source IP address ranges associated with an inbound network connection

Use the SourceIpRanges value of the PropertyName field on the InboundNetworkConnProperty object.

#### Metadata API

Metadata API includes new and changed types and fields.

# Salesforce Overall

#### Point to specific elements on a page with targeted prompts (beta)

To choose from more prompt types, use the new displayType field on the PromptVersion subtype of the Prompt metadata type.

#### Position and associate targeted prompts to page elements (beta)

To determine where to place a targeted prompt, use the new elementRelativePosition and referenceElementContext fields on the PromptVersion subtype of the Prompt metadata type.

# **Analytics**

#### **Enable New Analytics Features**

Enable these features using new fields on the AnalyticsSettings metadata type.

- Enable the use of Tableau CRM SQL Datasets with the enableSqlDataset field.
- Enable the ability to index Tableau CRM multi-value dimensions using the enableWaveIndexMVDimV2 field.

#### DEPRECATED: The enableReportCrtAutoAddPref field on the AnalyticsSettings metadata type is deprecated

This field is deprecated in API version 52.0.

# Commerce

#### Use B2B Commerce Promotions feature in flows to price promotions in your cart

Use the new action for Checkout Flow from the actionType field on the FlowActionCall subtype of the Flow metadata type.

• Price the promotions in your cart with calcCartPromotionsAction.

# Determine how product variations appear in search results for a store

Use the new productGrouping field on the WebStoreTemplate metadata type.

#### Set the active checkout period and the checkout expiration date for a store

Use the new checkoutTimeToLive and checkoutValidAfterDate fields on the WebStoreTemplate metadata type.

#### Create ReturnOrders and ReturnOrderLineItems in flows

Use the new createReturnOrder action for Order Management from the actionType field on the FlowActionCall subtype of the Flow metadata type.

#### Process ReturnOrderLineItems in flows

Use the new returnReturnOrderItems action for Order Management from the actionType field on the FlowActionCall subtype of the Flow metadata type.

#### Customization

# Indicate whether records owned by high-volume community or site users are included in guest user sharing rules

Use the new includeHVUOwnedRecords field on the SharingGuestRule metadata type.

# Control the visibility that users have to a field based on the field's compliance categorization

Use the new FieldRestrictionRule metadata type.

# Control the access that specified users have to designated records (beta)

Use the new RestrictionRule metadata type.

# **Data Processing Engine**

## Get hierarchy path of a record in a data processing engine definition

Use the BatchCalcJobHierarchyPath metadata subtype of the BatchCalcJobDefinition metadata type.

#### Define compute relative transformation to partition the records and sort the records within each partition

Use the partitionBy field and the orderBy field on the BatchCalcJobTransform metadata subtype of the BatchCalcJobDefinition metadata type.

#### Einstein

# Create a draft Al application

Use the Draft value from the status field on the AlApplication type.

#### Einstein Automate

#### Improve the layout of flow screens by using sections and columns to organize fields (generally available)

Use these fields and values on the FlowScreenField subtype of the Flow metadata type.

- 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 (Generally Available) in Salesforce release notes.

#### Trigger a flow to run or execute an outcome if field values on a record have changed in the current transaction

Use the new is Changed operator in the FlowComparisonOperator enum of the existing FlowCondition metadata subtype of the Flow metadata type. The isChanged operator takes a boolean true/false value on the right side in Flow Builder.

#### Add Salesforce object fields to flow screens (beta)

Use these fields and values on the FlowScreenField subtype of the Flow metadata type.

- To specify that a screen field is a field from a Salesforce object, use the new ObjectProvided value of the fieldType field.
- To specify the Salesforce object field for an ObjectProvided field, use the new objectFieldReference field. For example, <objectFieldReference>myAccountVar.Name</objectFieldReference>, where myAccountVar is the record variable API name and Name is the field on the record variable.

For more information, see Place Fields from Your Salesforce Objects Directly on Flow Screens (Beta) in Salesforce release notes.

# BEHAVIOR CHANGE: The defaultValue field on the FlowScreenField subtype of the Flow metadata type can now be used for choice resources

The defaultValue field is now supported when the FlowScreenField subtype has a fieldType field value of RadioButtons, DropdownBox, MultiSelectCheckboxes, or MultiSelectPicklist. For more information, see Use the Default Value of Flow Screen Components for Choice Resources in Salesforce release notes.

#### Sort and limit data in a collection

Use the new collectionProcessors field on the Flow metadata type.

For more information, see Sort and Limit Data in a Collection in Salesforce release notes.

# **Experience Cloud**

# Apply a color palette to a section in an LWR site

Use the new scopedBrandingSetID property in the view\_name.json file in the views folder on the ExperienceBundle type. This property is specific to the community layout: section component.

# Apply a color palette to your LWR site and site sections

Use the new brandingSetType property in the brandingSets\_name.json file in the brandingSets folder on the ExperienceBundle type. The color palette stored in the branding set can be applied to an entire site or a specific section of the site.

#### Field Service

#### Generate work plans and work steps automatically for a work order or work order line item

Use the new enableWorkPlansAutoGeneration field on the FieldServiceSettings metadata type.

# Map custom fields from a template to work plans and work steps

Use the new objectMappingItem field on the FieldServiceSettings metadata type.

# Functions (Beta)

# Understand which Salesforce Functions are available in your org

Use the new FunctionReference metadata type to inspect which Functions your org is connected to.

# Intelligent Form Reader

#### Extract and map information from a form using a document type

Use the new OcrSampleDocument metadata type.

#### Map a form and a Salesforce object using Intelligent Form Reader

Use the new OcrTemplate metadata type.

# Sales

# Get more options for creating and managing forecast types

Use the new ForecastingSourceDefinition, ForecastingType, and ForecastingTypeSource metadata types.

# Control which object types and field types appear in the list of object details on the forecasts page

Use the new ForecastingTypeObjectListSettings, ForecastingObjectListLabelMapping, ForecastingObjectListSelectedSettings, ForecastingObjectListSettings, and ForecastingObjectListUnselectedSettings metadata types.

# Enable Pipeline Inspection and give sales teams a consolidated pipeline view with metrics, opportunities, and recent changes

Use the new enablePipelineInspection and enableExpandedPipelineInspectionSetup fields on the OpportunitySettings metadata type.

# Deploy and retrieve an org's range of IP addresses

Use the new ipAddressRange metadata type.

# Security and Identity

#### Redirect system-managed site URLs to your custom domain

Use the new redirectToCustomDomain field on the CustomSite metadata type.

# Choose how to cache your site's Visualforce pages

Use the new cachePublicVisualforcePagesInProxyServers field on the CustomSite metadata type.

# **DEPRECATED:** The enableVisualforceApiAccessAllowed field on the SiteSettings metadata type is deprecated This field is deprecated in API version 52.0.

# Block redirects to unknown URLs that are provided in the state parameter of the OAuth response during a server-side callback Use the blockEmbeddedLoginUnknownURLRedirect field on the CommunitiesSettings metadata type.

# Allow external applications to access Customer Data Platform (CDP) ingest API services

Use the CDPIngest value of the scopes field on the ConnectedAppOauthConfig metadata subtype of the ConnectedApp metadata type.

# Redirect expired browser tabs to a custom logout URL

Use the uselocalStorageForlogoutUrl field on the SessionSettings metadata subtype of the SecuritySettings metadata type.

# View the source IP address ranges associated with an inbound network connection

Use the SourceIpRanges value of the propertyName field on the InboundNetworkConnProperty metadata subtype of the InboundNetworkConnection metadata type.

# REMOVED: The cspUpgradeInsecureRequests and requireHttps fields on the CustomSite metadata type have been removed

These fields are removed in API version 52.0 and later. In API version 51.0 and earlier, the value in the field is ignored.

#### Service

# Enable the Workforce Engagement product and opt to use Machine Learning based forecasting

Use the new WorkforceEngagementSettings metadata type.

# **Turn on the Service Setup Assistant**

Use the new ServiceSetupAssistantSettings metadata type.

# Turn on Einstein classification apps, Einstein Case Classification and Einstein Case Wrap-Up

Use the new EinsteinAgentSettings metadata type, which replaces the CaseClassificationSettings metadata type.

# **Enable Service Cloud Voice features**

Use the ServiceCloudVoiceSettings metadata type.

# Create an invocable action for Omni-Channel skills-based routing

Use the new skillsBasedRouting value of the actionType field on the FlowActionCall metadata subtype of the Flow metadata type.

#### Create invocable actions for Work Plan in Field Service

Use the new addWorkPlans, addWorkSteps, deleteWorkPlans, and generateWorkPlans values of the actionType field on the FlowActionCall metadata subtype of the Flow metadata type.

# Single Source of Truth

#### Retrieve definitions about a Calculated Insight

Use the new MktCalcInsightObjectDef metadata type.

# Einstein

Einstein Lead Scoring has a guided setup flow, and it gives you the option to score segments of leads for more accurate results. All Einstein Search features, including personalization, natural language search, and the actionable instant results are now generally available at no extra cost. Einstein classification tools are expanded and improved, including Einstein Case Wrap-Up, which is now generally available. Work more productively and get more accurate and personalized results with all the features that Salesforce Einstein has to offer.

# Salesforce Overall

# **Einstein Search (Generally Available)**

Give your users a smarter search powered by Al. All features of Einstein Search are now generally available at no extra cost. Personalization returns relevant search results based on a user's activity. Natural language search (NLS) lets users type common words and phrases in their queries to filter search results. And the actionable UI lets your users accomplish tasks right from the search box, such as logging a case or creating a contact.

# **Analytics**

# **Einstein Discovery**

Einstein Discovery for Reports, formerly known as Einstein Data Insights, lets you see what's changed in your data analysis between report runs. Increase prediction transparency with model cards to help you document and communicate important usage information about your predictions. Produce better models with feature engineering enhancements that let you bucket categories with fuzzy matching and impute missing values.

# Customization

#### **Einstein Recommendation Builder**

Build recommendations faster and smarter with Einstein Recommendation Builder. You can build a custom recommendation or use a template. The Parts to Work Orders template lets you build field service recommendations quickly.

# Development

#### **Einstein Vision and Language**

Not a data scientist or machine learning expert, but still want to integrate Al into your apps? Use the Einstein Vision and Language APIs to easily Al-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pretrained 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.

# Einstein Automate

# **Einstein Bots**

Help your bots reach more customers in the languages they use every day with language improvements in Input Recommender, language-based intent sets, and three new beta languages. With Article Answers, now in beta, you can create knowledge data categories

to deliver knowledge articles to different groups of customers. Intent management bulk actions allow you to move utterances around with ease.

# **Industries**

# **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.

# Sales

#### **Sales Cloud Einstein**

Score different types of leads separately for more accurate scores and set up Einstein Lead Scoring more easily with guided setup.

# Service

#### **Einstein for Service**

We're always on the lookout for ways that Einstein can make you and your agents more productive. Einstein Case Wrap-Up, now generally available, predicts case field values when agents finish customer chats. And we notify you when Einstein Reply Recommendations refreshes reply templates so you can publish new and updated replies for agents to use.

# Einstein Automate

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (pilot). Integrate across any system with Mulesoft Composer for Salesforce. Build and deliver personalized recommendations with Einstein Recommendation Builder and Einstein Next Best Action.

# IN THIS SECTION:

# MuleSoft Composer for Salesforce

MuleSoft Composer for Salesforce (Composer) makes it easy for you to build process automation for data using clicks instead of code from within Salesforce. When you create a secure process to connect the information stored in different systems, you build a real-time, integrated view of your customers and your business.

#### OmniStudio

OmniStudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Create guided interactions using data from Salesforce and external sources.

# Einstein Recommendation Builder

Einstein learns from past data so you can deliver personalized, Al-driven recommendations to your customers. Use the Parts to Work Orders template to build your field service recommendations faster.

#### Salesforce Flow

Build richer flow screens faster with multicolumn layouts, record fields, and improvements to picklists and other choice components. Record-triggered flows now support debugging; conditions based on whether specified fields were changed on the triggering record; and ISCHANGED, ISNEW, and PRIORVALUE formula functions. Quickly generate invocable actions for flows by using External Services with MuleSoft Anypoint Platform APIs (pilot).

#### Einstein Bots

Help your bots reach more customers in the languages they use every day with language improvements in Input Recommender, language-based intent sets, and three new beta languages. With Article Answers, now in beta, you can create knowledge data categories to deliver knowledge articles to different groups of customers. Intent management bulk actions allow you to move utterances around with ease.

#### Flow Orchestrator (Pilot)

Orchestrate complex, multi-step, and multi-assignee business processes. Display orchestrated work items to assignees on relevant record pages.

# **MuleSoft Composer for Salesforce**

MuleSoft Composer for Salesforce (Composer) makes it easy for you to build process automation for data using clicks instead of code from within Salesforce. When you create a secure process to connect the information stored in different systems, you build a real-time, integrated view of your customers and your business.

**Where:** MuleSoft Composer for Salesforce is available for an extra cost in Enterprise, Performance, and Unlimited editions that have enabled Lightning Experience.

For Composer release notes and help, see MuleSoft Composer for Salesforce.

# **OmniStudio**

OmniStudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Create guided interactions using data from Salesforce and external sources.

**Where:** OmniStudio is available for an extra cost in Enterprise, Performance, and Unlimited editions and works with Lightning Experience, Experience Builder sites, and all versions of the mobile app.

#### **OmniStudio FlexCards**

Conditionally apply styles to an element. Run FlexCards outside of the Salesforce platform. Create selectable items on a FlexCard to add and remove objects from the data JSON. Debug your FlexCards in Preview with the Data JSON and Action Debugger. Recursively add a child FlexCard to itself. Provide your FlexCard with data from an SDK.

# **OmniScripts**

Restart OmniScripts and deploy OmniScripts to Adobe Experience Manager.

#### **OmniStudio DataPacks and IDX Workbench**

Import older DataPacks into OmniStudio.

For OmniStudio release notes and documentation, see OmniStudio Foundation. For OmniStudio pricing, contact your Salesforce account executive.

# Einstein Recommendation Builder

Einstein learns from past data so you can deliver personalized, Al-driven recommendations to your customers. Use the Parts to Work Orders template to build your field service recommendations faster.

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

SEE ALSO:

**Einstein Recommendation Builder** 

# Salesforce Flow

Build richer flow screens faster with multicolumn layouts, record fields, and improvements to picklists and other choice components. Record-triggered flows now support debugging; conditions based on whether specified fields were changed on the triggering record; and ISCHANGED, ISNEW, and PRIORVALUE formula functions. Quickly generate invocable actions for flows by using External Services with MuleSoft Anypoint Platform APIs (pilot).

#### IN THIS SECTION:

#### Flow Builder

Take advantage of more screen real estate by building multicolumn screens. Record-triggered flows can perform logic based on prior record values and whether the triggering record is new or changed. Screen components that offer choices now support default values, true picklist requiredness, and options to switch the component type. Easily add record fields to your screens.

#### Flow Debugging

Debug record-triggered flows in Flow Builder. Debug autolaunched flows with Pause elements that are configured to resume at a specified time. Debug failed flow interviews from a new list view or from improved error emails. Expand debug details to include when transactions are committed or rolled back.

#### Flow and Process Management

Screen flow interview log entries are limited to 75,000 records an hour. The process automation setting that filters inaccessible fields from flow requests applies only to flows that run on API version 51.0 or earlier. The Time-Based Workflow page now displays the associated object for flow scheduled paths and process scheduled actions.

#### Flow Extensions

Use External Services with MuleSoft Anypoint Platform APIs to quickly generate invocable actions for flows (pilot).

#### Flow and Process Release Updates

Enforce the running user's data access when Flow Builder uses a merge field to access a field on a related record. 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.

#### Flow and Process Run-Time Improvements in API Version 52.0

These updates affect only flows and processes that are configured to run on API version 52.0 or later. Versioned updates let you test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

# Flow Builder

Take advantage of more screen real estate by building multicolumn screens. Record-triggered flows can perform logic based on prior record values and whether the triggering record is new or changed. Screen components that offer choices now support default values, true picklist requiredness, and options to switch the component type. Easily add record fields to your screens.

#### IN THIS SECTION:

# Build Multicolumn Screens in Flow Builder (Generally Available)

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 generally available, includes changes since the beta release. The Section component is now supported in flows that get launched from Einstein Next Best Action and Actions & Recommendations components. Labels for components in sections are now supported in Translation Workbench.

# Use Is Changed in Condition Logic for Start Elements and Decision Elements

Use the new Is Changed operator in your condition logic for Start elements and Decision elements in record-triggered flows. With the Is Changed operator, you can define conditions that check whether certain field values on the record changed in the current transaction.

#### Use ISCHANGED, ISNEW, and PRIORVALUE in Record-Triggered Flow Formulas

Record-triggered flows for new and updated records now support the ISCHANGED, ISNEW, and PRIORVALUE formula functions. Copy your Process Builder or workflow rules formulas containing these functions into record-triggered flows. None of these formula functions are available in flows triggered when a record is deleted.

# Set a Default Value for Any Screen Component That Displays Choices

Want to set a default value for a choice component? Say goodbye to limitations or complicated workarounds when your component uses a picklist choice set or a record choice set. Now you can set a default value using any flow resource. Use a record query, an action, or another component. Or manually select a specific picklist value when you use a picklist choice set. Previously, you could only select a choice resource for the default value.

# Control Picklist Requiredness More Accurately

For all picklist components, you can now enforce picklists as required for your screen flows. With API version 52.0 and later, you can also set up optional picklists in screen flows.

#### Switch Between Choice Components When Building Flow Screens

Now start with one choice component on a flow screen, such as radio buttons, and easily change to a different choice component, such as a picklist, without starting over. Use the new Let Users Select Multiple Options and Component Type fields to make this change.

# Place Fields from Your Salesforce Objects Directly on Flow Screens (Beta)

Now you can build screen flows faster by directly adding your existing Salesforce record fields. When you add a record field to a flow screen, the field's name, data type, help text, requiredness, and existing values are automatically configured for you.

#### Sort and Limit Data in a Collection

Now you can use the Collection Sort element to prioritize and limit your collected data. You can also limit the remaining items in the collection variable after the sort. For example, you can sort a collection of user-chosen products by preference and pricing. You can also reduce a record collection variable to only the top 100 priority accounts, ensuring that the flow doesn't hit the element limit when that collection variable is processed by a large loop. Previously, it wasn't possible to reorder the values. It also was difficult to separate a collection variable's highest or lowest values and to avoid hitting flow limits when looping through a large collection.

#### Create Scheduled Paths in Auto-Layout (Beta)

Now you can create scheduled paths while in auto-layout. This ability is similar to using scheduled actions in Process Builder or time-dependent actions in workflow rules, but now in auto-layout Flow Builder. Scheduled paths that can run part of a record-triggered flow after its triggering effect were added in Spring '21.

#### Preview More Flow Screen Components

Now you can preview many more standard components on the canvas when you're building a screen in Flow Builder. Get immediate feedback about how your configuration affects a component. Easily decide whether the component you selected is the right one. Previously, more than half of the standard screen components available in Flow Builder used a placeholder in the canvas rather than a preview.

#### Directly Update Fields in Record-Triggered Flows

With a new option in the Update Records element for record-triggered flows, you can directly update the record that triggered the flow. Previously you set filter criteria for the triggering record with a Decision element, but now you can use the Update Records element. The Update Records element only displays fields you can update, and the new option is available in all record-triggered and schedule-triggered flows. These changes mean you can now easily switch between record-triggered flows that run before or after the record is saved. Existing before-save record-triggered flows that use an Assignment element to set values for the record that triggered the flow are unaffected by this change.

# Salesforce Flow Accessibility Enhancements

Focus management has been improved in the flow screen experience. If there's an error on the current flow screen, the focus is set to the first field with an error. If there aren't any errors on the current flow screen, using Previous or Next displays the appropriate screen and the focus is set to its first focusable field. Also, screen readers are now able to read labels associated with more components, including Currency, Multi-Select Picklist, Name, Number, Picklist, Radio Buttons, and URL.

# Build Flows on a Larger Auto-Layout Canvas (Beta)

Now you can expand your flows and avoid exceeding size limits. The new canvas is more than five times larger, designed to accommodate your most complex flows. Give it a try by converting your largest flow to auto-layout.

# See Conditional Visibility on Flow Screens at a Glance

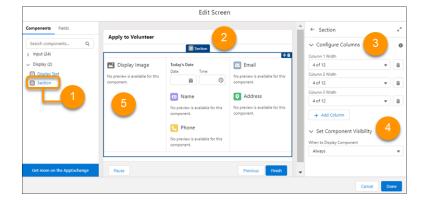
Conditional visibility is now more visible. Flow Builder now displays a visibility icon next to components and fields with conditional visibility rules. Also, when a component or field with at least one conditional visibility rule is selected, the Set Component Visibility or Set Field Visibility section is automatically expanded.

# Build Multicolumn Screens in Flow Builder (Generally Available)

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 generally available, includes changes since the beta release. The Section component is now supported in flows that get launched from Einstein Next Best Action and Actions & Recommendations components. Labels for components in sections are now supported in Translation Workbench.

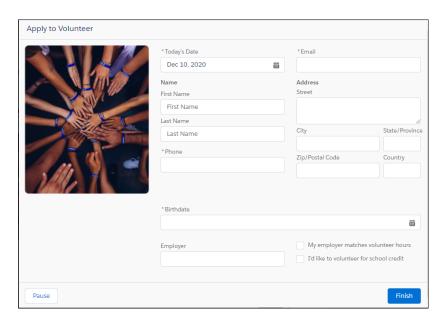
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Multicolumn screens are supported only in Lightning runtime for flows.

**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.



SEE ALSO:

Metadata API

# Use Is Changed in Condition Logic for Start Elements and Decision Elements

Use the new Is Changed operator in your condition logic for Start elements and Decision elements in record-triggered flows. With the Is Changed operator, you can define conditions that check whether certain field values on the record changed in the current transaction.

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

How: In Start elements, the Is Changed operator is available for flows that are triggered when a record is updated. The Is Changed operator isn't available for flows that are triggered when a record is created or deleted. When you edit the Start element and configure the trigger, select the A record is updated or the A record is created or updated option for when the flow is triggered, and select the After the record is saved option for when the flow runs. When you set up the condition for the object, use the Is Changed operator with fields of the selected object. If the condition with the Is Changed operator is True, then the flow is triggered to run when the field value is changed. If the condition is False, then the flow is triggered to run when the field value isn't changed.



**Note**: For Start elements, if you select the Is Changed operator in a condition, you can't change when to run the flow for updated records.

In Decision elements, use the Is Changed operator with field values of the \$Record global variable, which contains the triggering record. If the condition with the Is Changed operator is True, then the flow executes the outcome when the field value is changed. If the condition is False, then the flow executes the outcome when the field value isn't changed.



**Note**: For Decision elements, if you select the Is Changed operator in a condition, you can't change when to execute the outcome.

SEE ALSO:

Salesforce Winter '21 Release Notes: Take a Flow Path Only When Certain Record Changes are Made

## Use ISCHANGED, ISNEW, and PRIORVALUE in Record-Triggered Flow Formulas

Record-triggered flows for new and updated records now support the ISCHANGED, ISNEW, and PRIORVALUE formula functions. Copy your Process Builder or workflow rules formulas containing these functions into record-triggered flows. None of these formula functions are available in flows triggered when a record is deleted.

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

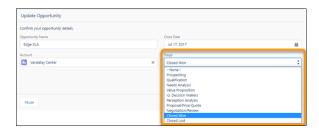
**How:** When copying formulas containing ISCHANGED and PRIORVALUE into record-triggered flows, use the \$Record global variable instead of the object. For example, to use ISCHANGED (account.x) in a record-triggered flow formula, change it to ISCHANGED (\$Record.x). The ISNEW formula function requires no changes because it has no parameters.

# Set a Default Value for Any Screen Component That Displays Choices

Want to set a default value for a choice component? Say goodbye to limitations or complicated workarounds when your component uses a picklist choice set or a record choice set. Now you can set a default value using any flow resource. Use a record query, an action, or another component. Or manually select a specific picklist value when you use a picklist choice set. Previously, you could only select a choice resource for the default value.

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

**Why:** Say you use a screen flow to make it easier to ask users to update opportunity details. The user sets the opportunity's stage, and you want the Stage picklist to preselect the opportunity record's current stage. In the Stage picklist that appears on the screen, Closed Won is preselected.



At runtime, a choice is preselected if its value matches the component's default value. When the default value is a flow reference, we resolve that reference before matching. When you save and run the flow, the default value is preselected in the resulting list of choices.

For choice components that let the user select a single option (Picklists and Radio Buttons), Salesforce preselects the first choice that matches:



For choice components that let the user select multiple options (Multi-Select Picklists and Checkbox Groups), we preselect every choice that matches:

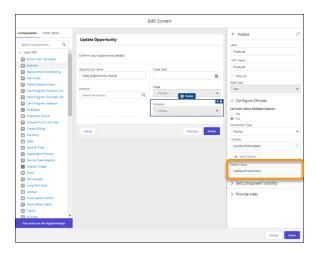


To specify multiple default values for choice components that let the user select multiple options, separate the values with semicolons. If the resolved default value includes semicolons (Red;Blue), we treat each value as a separate default. For example, to set the default value to both "Red" and "Blue", enter Red;Blue. At run time, we preselect every choice option whose value is "Red" or "Blue". If a choice's value is an exact match, like "Red;Blue", then we don't select it.

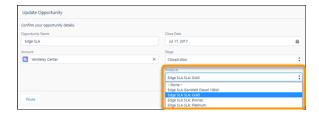
Here's how we determine which choice options to preselect at run time.

If your default value is	Then at run time we preselect choice options based on
A choice resource that's included in the list of choice options for the component	A match for the selected choice's API name.
A choice resource that's <i>not</i> included in the list of choice options for the component	The resolved value of the choice resource. If a given choice's value matches the resolved default value, then that choice is selected.
Another resource in the flow such as a reference from a Get Records element	The resolved value of the flow resource. If a given choice's value matches the resolved default value, then that choice is selected.
A manually entered value	The manually entered value. If a given choice's value matches the manually entered value, then that choice is selected.

And because it makes more sense to set the default value after you've added the possible options, we moved the Default Value field from below the Data Type field to below the choice options. To set a default value, add at least one choice.



**How:** When configuring choices for a screen component, add choice resources. For the Default Value field, specify a picklist value or another flow resource (a variable, a field on a record variable, a manually entered value, and so on). When you save and run the flow, the default value determines which options are preselected.



None of the choice options are duplicated, and the order of the choices is retained.

SEE ALSO:

Metadata API

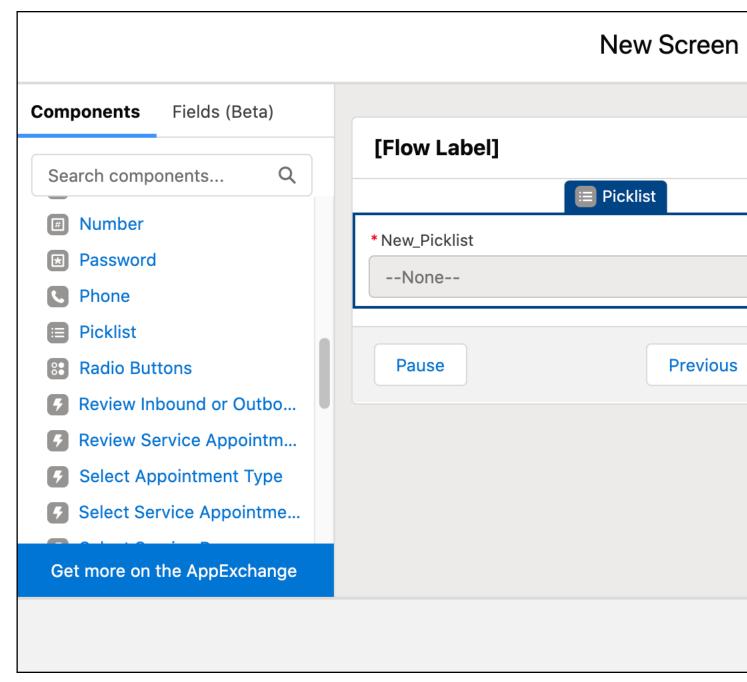
# Control Picklist Requiredness More Accurately

For all picklist components, you can now enforce picklists as required for your screen flows. With API version 52.0 and later, you can also set up optional picklists in screen flows.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. For flows that run in API version 52.0 and later, the versioned update automatically includes the --None-- picklist option prepended to the list of picklist options at run-time. The addition of the Required checkbox in the picklist component in Flow Builder isn't versioned.

**Why:** Picklist components always have an option selected. If a default value is not provided, picklists always select the first option in the list. In previous API versions, if a picklist didn't have a default value, the first option in the list was automatically selected. Without the --None-- picklist option, a required picklist automatically selects the first option and starts out in a state that doesn't trigger the requiredness check at run-time. Picklist components didn't have options to indicate that no options were selected, which meant that you had to create your own option to validate users choosing a different option. Previously, picklist components didn't have a specific option to set whether a picklist is required for the flow screen.

**How:** The --None-- picklist option shows up in the list of options and is automatically prepended in picklists, so that Flow Builder accurately evaluates the picklist requiredness with the appropriate picklist value. Selecting the --None-- picklist option is equivalent to not selecting any options, and this option is treated as null.



The Required checkbox option is available when you set up the picklist component.

#### SEE ALSO:

Flow and Process Run-Time Improvements in API Version 52.0

## Switch Between Choice Components When Building Flow Screens

Now start with one choice component on a flow screen, such as radio buttons, and easily change to a different choice component, such as a picklist, without starting over. Use the new Let Users Select Multiple Options and Component Type fields to make this change.

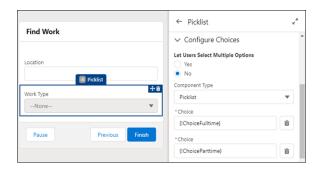
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Flow screens have four types of choice components: checkbox group, multi-select picklist, picklist, and radio buttons. The Checkbox Group and Multi-Select Picklist components allow flow users to select multiple choices. The Picklist and Radio Buttons components allow users to select one. And picklist type components take up less real estate on flow screens than checkbox groups or radio buttons. The Let Users Select Multiple Options and Component Type fields allow you to change the choice component already on your screen with minimal reconfiguration.

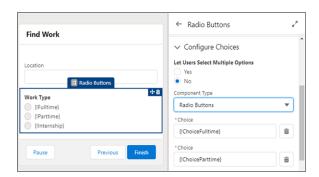
**How:** Place a choice component on a flow screen and configure it to use choices with a text data type. Then select different settings for the Let Users Select Multiple Options and Component Type fields.

All multi-select choice components use a text data type, but radio buttons and picklists can also use numbers or Boolean choices. When you select **Yes** for Let Users Select Multiple Options, Data Type is automatically set to Text, and non-text Choice resources are cleared from the component configuration.

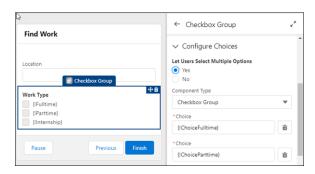
For example, you initially choose a picklist with a text data type to display work types to users.



There are only three work types to choose from. To let users see the three options without pulling down a picklist, select **Radio Buttons** for the Component Type field.



In this example, flow users can now see the available work types, but they can only select one type of work. To let users select multiple options, select **Yes** for Let Users Select Multiple Options and then select **Checkbox Group** for the Component Type field.



Now flow users can see all available work types and select multiple options.

## Place Fields from Your Salesforce Objects Directly on Flow Screens (Beta)

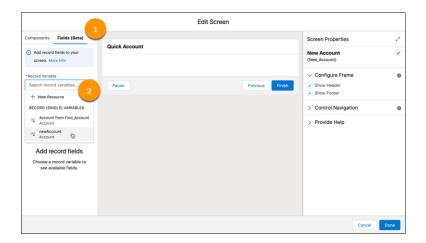
Now you can build screen flows faster by directly adding your existing Salesforce record fields. When you add a record field to a flow screen, the field's name, data type, help text, requiredness, and existing values are automatically configured for you.

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

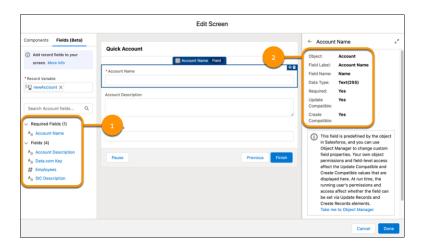


**Note:** As a beta feature, Fields is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee 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 Fields beta in the Trailblazer Community.

**How:** The Fields beta uses record variables to determine the fields that are available and their configuration. You can use a manually created record variable or a record variable automatically created by a Get Records element. If you don't have a record variable with the desired field's object in your flow, create a variable with a Record data type and choose the desired object.



When you have a record variable for the desired field's object, go to the Fields (Beta) tab (1) and select the record variable (2).



Drag a field from the list of fields (1) to the screen canvas. The field's details (2) appear at the right of the canvas. The values shown in Update Compatible and Create Compatible reflect the properties of the field and your permissions, but not the permissions of the users running the flow.

Just like other fields on a screen, record fields don't save data automatically. Use a Create Records or Update Records element to save the record variable. If the field contains a value in the record variable, that value is set in the screen at run time as a default value. Keep in mind that the Fields beta only supports certain data types.

SEE ALSO:

Salesforce Help: Flow Screen Input: Field (can be outdated or unavailable during release preview)

#### Sort and Limit Data in a Collection

Now you can use the Collection Sort element to prioritize and limit your collected data. You can also limit the remaining items in the collection variable after the sort. For example, you can sort a collection of user-chosen products by preference and pricing. You can also reduce a record collection variable to only the top 100 priority accounts, ensuring that the flow doesn't hit the element limit when that collection variable is processed by a large loop. Previously, it wasn't possible to reorder the values. It also was difficult to separate a collection variable's highest or lowest values and to avoid hitting flow limits when looping through a large collection.

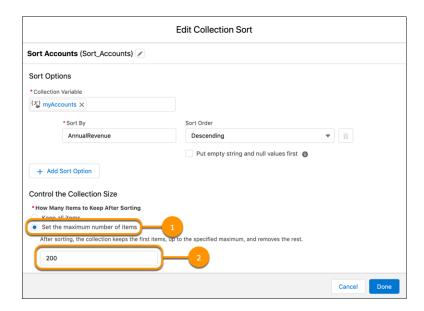
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. The Collection Sort element is available only in flows that run in API version 50.0 and later.

**How:** Drag a Collection Sort element onto the canvas. Or, if you're in auto-layout, click  $\bigoplus$  and select **Collection Sort**.



Select a collection variable (1). If it's a record collection variable or an Apex-defined collection variable, enter the field to sort the collection in Sort By (2). Click **Add Sort Option** (3) to add up to two additional sorting fields. If the collection variable contains a single list of values, Flow Builder automatically sets and hides the Sort By field.

All text-based fields including picklists are sorted alphabetically. Boolean fields are sorted as False first if Sort Order is set to Ascending, or sorted as True first if it's set to Descending.



To reduce the number of items in the collection, select **Set the maximum number of items** (1) and enter the maximum number of items in the field that appears (2).

# Create Scheduled Paths in Auto-Layout (Beta)

Now you can create scheduled paths while in auto-layout. This ability is similar to using scheduled actions in Process Builder or time-dependent actions in workflow rules, but now in auto-layout Flow Builder. Scheduled paths that can run part of a record-triggered flow after its triggering effect were added in Spring '21.

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



**Note:** As a beta feature, Scheduled Paths in Auto-Layout is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Scheduled Paths in Auto-Layout beta in the Trailblazer Community.

#### SEE ALSO:

Salesforce Spring '21 Release Notes: Run Part of a Record-Triggered Flow After the Triggering Event

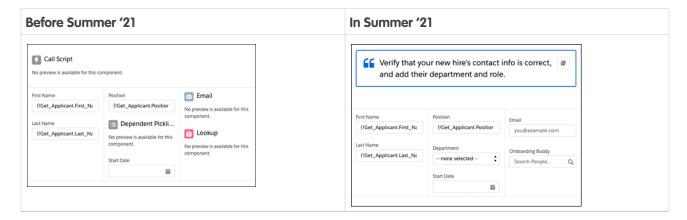
## **Preview More Flow Screen Components**

Now you can preview many more standard components on the canvas when you're building a screen in Flow Builder. Get immediate feedback about how your configuration affects a component. Easily decide whether the component you selected is the right one. Previously, more than half of the standard screen components available in Flow Builder used a placeholder in the canvas rather than a preview.

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

**Why:** Configure your component and immediately see your changes in the component on the canvas. You can preview a component only after you set its required attribute values.

You can preview these components: Address, Call Script, Dependent Picklist, Email, Display Image, File Upload, Lookup, Name, Phone, Slider, Toggle, and URL. And you can preview most checkout flow components. Previously, screen components showed as placeholders on the canvas, and now they show as previews.



**How:** When you build a screen, add a screen component and set its required attributes. Flow Builder previews the component in the canvas.

Because the flow isn't running when you build a screen, Salesforce can't resolve references. So if an attribute value contains a reference such as {!myVar} instead of a manually entered value, we can't pass that value to the previewed component. And if a required attribute for a component is set to a reference, Salesforce doesn't preview the component.

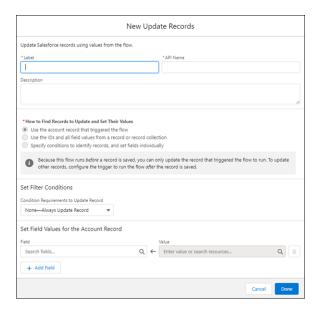
When Salesforce previews a screen component, the initial state of the component is rendered based on your configuration. If you see errors on the canvas after you configure a component, the same errors appear for the screen when users run the flow. For example, if you set the API name of the source object for a Lookup component to an object that doesn't exist, you see an error message indicating so. Previously, to get feedback that the API name of the object was incorrect, you had to run the flow.

## Directly Update Fields in Record-Triggered Flows

With a new option in the Update Records element for record-triggered flows, you can directly update the record that triggered the flow. Previously you set filter criteria for the triggering record with a Decision element, but now you can use the Update Records element. The Update Records element only displays fields you can update, and the new option is available in all record-triggered and schedule-triggered flows. These changes mean you can now easily switch between record-triggered flows that run before or after the record is saved. Existing before-save record-triggered flows that use an Assignment element to set values for the record that triggered the flow are unaffected by this change.

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

**How:** Add an Update Records element to your record-triggered flow. While all three options for How to Find Records to Update and Set Their Values are displayed, only the first option is selectable for before-save record-triggered flows. In this example, we're setting up a before-save record-triggered flow for accounts.

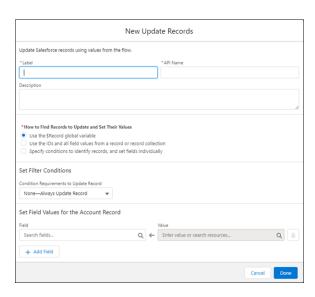


When using the first option, you can only update fields on the record that triggered the flow. To update fields on related records in after-save record-triggered flows, select one of the other options.



**Note**: To use the Is Changed operator in a flow triggered when a record is updated, set condition requirements in the Start element.

This new option also allows you to directly update records in schedule-triggered flows.



## Salesforce Flow Accessibility Enhancements

Focus management has been improved in the flow screen experience. If there's an error on the current flow screen, the focus is set to the first field with an error. If there aren't any errors on the current flow screen, using Previous or Next displays the appropriate screen and the focus is set to its first focusable field. Also, screen readers are now able to read labels associated with more components, including Currency, Multi-Select Picklist, Name, Number, Picklist, Radio Buttons, and URL.

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

## Build Flows on a Larger Auto-Layout Canvas (Beta)

Now you can expand your flows and avoid exceeding size limits. The new canvas is more than five times larger, designed to accommodate your most complex flows. Give it a try by converting your largest flow to auto-layout.

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

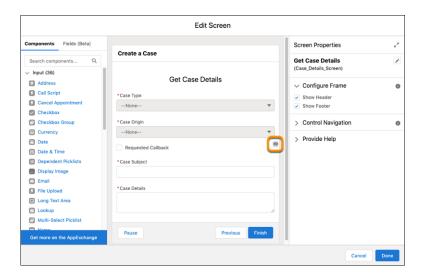
This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms. You can provide feedback and suggestions in the Trailblazer Community.

## See Conditional Visibility on Flow Screens at a Glance

Conditional visibility is now more visible. Flow Builder now displays a visibility icon next to components and fields with conditional visibility rules. Also, when a component or field with at least one conditional visibility rule is selected, the Set Component Visibility or Set Field Visibility section is automatically expanded.

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

**How:** When you edit a screen element in Flow Builder, look for the visibility icon ( ) next to components and fields that have at least one conditional visibility rule.



# Flow Debugging

Debug record-triggered flows in Flow Builder. Debug autolaunched flows with Pause elements that are configured to resume at a specified time. Debug failed flow interviews from a new list view or from improved error emails. Expand debug details to include when transactions are committed or rolled back.

#### IN THIS SECTION:

#### Debug Record-Triggered Flows

In Flow Builder, you can easily set up how you want to debug a record-triggered flow. For all your record-trigger flows that make before-save and after-save updates, you can now choose a record and trigger a debug run. Previously, Flow Builder didn't provide debugging for record-triggered flows.

#### Find Failed Flows Faster

Skip your inbox and go straight to the new Failed Flow Interviews list view. Now, if your flows have failed interviews, you can find them all in one place. You can create a custom list view that includes paused and failed flow interviews. Previously, you clicked a link in a flow error email to start debugging a failed flow interview.

## Debug Flows After Pause Elements in Flow Builder

Now you can continue to debug a flow even after a Pause element is executed. If the pause conditions are met, you can choose a pause configuration that resumes the flow. Only pause configurations that run at a specific time are supported. Previously, you couldn't resume a flow after a Pause element when you debugged a flow in Flow Builder.

#### Debug a Flow to See When Transactions Are Committed

Schedule-triggered flows and autolaunched flows that have no triggers can now show debug details for transactions that are committed or that are rolled back due to an error. If a flow fails, you can debug the flow to see whether record changes were permanently saved to the database via committed transactions before the failure.

#### Debug Flows in Auto-Layout (Beta)

With just a couple of clicks, debug your flow in auto-layout. Get the same rich and contextual debugging experience for flows built in auto-layout that you do for flows built in free-form. Debug directly on the canvas, or via a link in a flow error email. Welcome to a new era of simplified debugging!

#### Read Flow Error Emails More Easily

In a flow error email subject line, see the flow version label instead of the flow API name, which isn't as understandable. In the body of the email, the text about debugging the flow interview in Flow Builder when a batch of flow interviews fails is clearer. The new text is: Debug one of the failed interviews in Flow Builder.

#### Debug Flows with One Button

Debug flows faster without choosing between debugging on the canvas or viewing only debug details. The flow now determines whether you can debug on the canvas or see only the debug details. For example, you can debug autolaunched flows with or without triggers on the canvas but debug screen flows only in the debug details.

## **Debug Record-Triggered Flows**

In Flow Builder, you can easily set up how you want to debug a record-triggered flow. For all your record-trigger flows that make before-save and after-save updates, you can now choose a record and trigger a debug run. Previously, Flow Builder didn't provide debugging for record-triggered flows.

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

**How:** Click **Debug** to view the debug setup options.

- Under Debug Options, the Skip start condition requirements option allows you to run the flow even if the record selected for the debug run doesn't meet the condition requirements specified in the Start element.
- The Run flow as another user option allows the flow to execute actions or create, update, or delete records as a specified user.
- The Run flow as another user option allows the flow to execute actions or create, update, or delete records as a specified user.
- The Run flow in rollback mode option is always enabled for debugging record-triggered flows so that you can run the flow without permanently changing the data in your Salesforce records. Any database changes that the interview makes are rolled back after the debug run ends. The debug run only executes the current flow and doesn't run any other record-triggered automation.
- Under Triggering Record, you can choose a record for the debug run, which triggers the flow as if the record is created, updated, or deleted
- For the Run the Flow As If the Record Is option, you can choose either to run the flow as if the record is created or updated. The debug run behavior is different for the Created and Updated options depending on the record-triggered flow using either the ISCHANGED formula function or a formula function that uses a prior record global variable.
  - If you use the ISCHANGED formula function and run the flow as if the record is created, the ISCHANGED formula function always returns True. If you use the ISCHANGED formula function and run the flow as if the record is updated, the ISCHANGED formula function always returns False.
  - If you use a formula function that uses a prior record global variable, and run the flow as if the record is created, the return value from the formula is null. The return value for running the flow as if the record is updated, is the same value as the current record used in the debug run.

#### Find Failed Flows Faster

Skip your inbox and go straight to the new Failed Flow Interviews list view. Now, if your flows have failed interviews, you can find them all in one place. You can create a custom list view that includes paused and failed flow interviews. Previously, you clicked a link in a flow error email to start debugging a failed flow interview.

**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.

**Why:** To support dates for paused and failed flow interviews, the Paused Date column changed to Paused or Failed Date. The new Interview Status column shows whether the flow interview is paused or has failed. For failed flow interviews, the interview status is Error.

Failed flow interviews for these flow types are saved and available to open in Flow Builder from the Failed Flow Interviews list view.

- Screen flows
- Record-triggered flows
- Schedule-triggered flows
- Autolaunched flows that aren't triggered

When you select list view filters for Interview Status in Classic, you see Running, Paused, Completed, and Error values. Only flow interviews that have the interview status of Paused or Error can appear in the list view. The Paused Flow Interviews component shows the Paused or Failed Date column, but the component shows only paused flow interviews.

**How:** In Setup, Paused Flow Interviews changed to Paused and Failed Flow Interviews. The Setup page now includes list views for flow interviews that are paused or have failed. The list views include more list view controls such as Sharing Settings and Select Fields to Display.

From Setup, enter flow in Quick Find box, and then select **Paused and Failed Flow Interviews**. The default list view is Paused Flow Interviews.

To open the flow interview in Flow Builder, click the interview label.

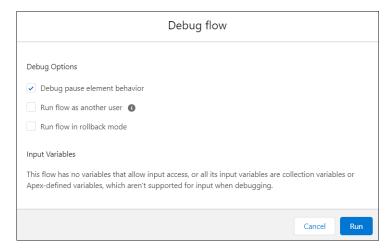


## Debug Flows After Pause Elements in Flow Builder

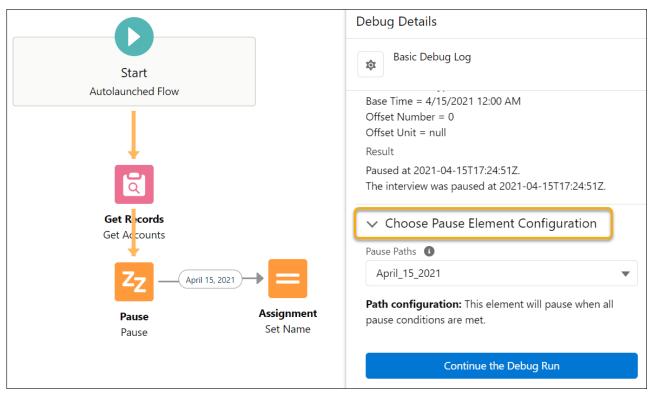
Now you can continue to debug a flow even after a Pause element is executed. If the pause conditions are met, you can choose a pause configuration that resumes the flow. Only pause configurations that run at a specific time are supported. Previously, you couldn't resume a flow after a Pause element when you debugged a flow in Flow Builder.

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

**How:** Debug the flow and select **Debug pause element behavior**.



Choose a pause configuration and continue debugging the flow.



If pause conditions aren't met for pause configurations that run at a specific time and the flow has no default path to take, the flow doesn't resume.

# Debug a Flow to See When Transactions Are Committed

Schedule-triggered flows and autolaunched flows that have no triggers can now show debug details for transactions that are committed or that are rolled back due to an error. If a flow fails, you can debug the flow to see whether record changes were permanently saved to the database via committed transactions before the failure.

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

**Why:** For example, a flow includes a Create Records element, an Update Records element, and an Action element that makes a call to an external system. The Create Records and Update Records elements modify records, so a transaction is committed before the Action element is executed. The flow fails after the Action element.

Previously, you couldn't debug the flow to see where transactions were committed during the debug run. Now you can quickly see that after the Update Records element, a transaction was committed that included record changes.



The debug details don't show committed transactions for these actions even if a transaction was committed.

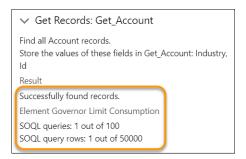
- archiveKnowledgeArticles
- cancelOrderItemSummariesPreview
- cancelOrderItemSummariesSubmit
- contentWorkspaceEnableFolders

- createFulfillmentOrder
- createInvoiceFromFulfillmentOrder
- createServiceReport
- getEligibleProgramRebateTypes
- massUpdateAccountForecast
- massUpdateSalesAgreement
- print
- publishKnowledgeArticles
- recalculateForecast
- refreshActualsCalculation
- submitDigitalFormResponse

**How:** Debug a flow in Flow Builder, and then from Debug Details, click **Basic Debug Log**. Select **Show Governor Limit Consumption** or **Show Transaction Boundaries** or both.



We moved the **Show query limits in debug details** check box from the Debug flow window to the debug details, so you can choose the details as you view them.



When you debug a flow from a flow error email, governor limits don't appear in debug details.

## Debug Flows in Auto-Layout (Beta)

With just a couple of clicks, debug your flow in auto-layout. Get the same rich and contextual debugging experience for flows built in auto-layout that you do for flows built in free-form. Debug directly on the canvas, or via a link in a flow error email. Welcome to a new era of simplified debugging!

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



**Note:** As a beta feature, Debug Flows in Auto-Layout is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions,

Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Debug Flows in Auto-Layout in the Trailblazer Community.

**Who:** To open failed flow interviews in Flow Builder, you need the Manage Flows permission.

**How:** After you build your flow in auto-layout, click **Debug** and then **Run**. See the debug run's highlighted path on the auto-layout canvas and review the debug details.



You can also click a link in a flow error email to open Flow Builder and see the failed flow interview's path on the auto-layout canvas. Considerations to keep in mind when you debug flows built in auto-layout:

- While you debug flows in auto-layout, you can't add or delete elements.
- If you have unsaved changes when you debug, we don't show highlighting for them.

## Read Flow Error Emails More Easily

In a flow error email subject line, see the flow version label instead of the flow API name, which isn't as understandable. In the body of the email, the text about debugging the flow interview in Flow Builder when a batch of flow interviews fails is clearer. The new text is: Debug one of the failed interviews in Flow Builder.

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

## Debug Flows with One Button

Debug flows faster without choosing between debugging on the canvas or viewing only debug details. The flow now determines whether you can debug on the canvas or see only the debug details. For example, you can debug autolaunched flows with or without triggers on the canvas but debug screen flows only in the debug details.

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

**How:** To start debugging a flow, you now click **Debug**.

# Flow and Process Management

Screen flow interview log entries are limited to 75,000 records an hour. The process automation setting that filters inaccessible fields from flow requests applies only to flows that run on API version 51.0 or earlier. The Time-Based Workflow page now displays the associated object for flow scheduled paths and process scheduled actions.

#### IN THIS SECTION:

#### Get Improved Performance with New Flow Interview Log Entries Limit

To improve performance such as page-load times, there's a new limit for the Flow Interview Log Entries object of 75,000 log records generated per hour. The original limit, which is still enforced, is 7 million log records a month for the previous 31 days.

#### Permanently Filter Read-Only Fields in Flow Builder

When a flow creates or updates a record, the flow now filters out system fields or other read-only fields on record variables. Previously, you enabled filtering of inaccessible fields from flow requests in the Salesforce process automation settings. Now the setting is permanently enabled for all flows. You can change the setting only for flows that are configured to run on API version 51.0 or earlier.

#### See More Associated Objects on the Time-Based Workflow Page

For new versions of flows or processes, you can now see the associated object for a flow scheduled path or a process scheduled action. Previously, the Time-Based Workflow page in Setup showed the associated object only for a workflow action.

#### Get Improved Performance with New Flow Interview Log Entries Limit

To improve performance such as page-load times, there's a new limit for the Flow Interview Log Entries object of 75,000 log records generated per hour. The original limit, which is still enforced, is 7 million log records a month for the previous 31 days.

**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.

Why: When the hourly limit is reached, Salesforce stops logging metrics to the Flow Interview Log Entries object for the remainder of the hour. If a flow interview is paused before the limit is reached and then is resumed during a later hour when the limit is not reached, Salesforce continues to log metrics for it. Salesforce automatically deletes all logs that are older than 31 days, even for orgs that haven't reached the 7 million record limit.

## Permanently Filter Read-Only Fields in Flow Builder

When a flow creates or updates a record, the flow now filters out system fields or other read-only fields on record variables. Previously, you enabled filtering of inaccessible fields from flow requests in the Salesforce process automation settings. Now the setting is permanently enabled for all flows. You can change the setting only for flows that are configured to run on API version 51.0 or earlier.

**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. Permanently filtering system fields or other read-only fields when creating or updating records is available only in flows that run in API version 52.0 and later.

# See More Associated Objects on the Time-Based Workflow Page

For new versions of flows or processes, you can now see the associated object for a flow scheduled path or a process scheduled action. Previously, the Time-Based Workflow page in Setup showed the associated object only for a workflow action.

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

### Flow Extensions

Use External Services with MuleSoft Anypoint Platform APIs to quickly generate invocable actions for flows (pilot).

#### IN THIS SECTION:

#### Generate Actions for Flow Builder from External Services for MuleSoft (Pilot)

You can now import your MuleSoft Anypoint Platform APIs in a few clicks with the External Services for MuleSoft wizard. Every endpoint is then converted into an action within your organization and immediately available in Flow Builder.

#### Generate Actions for Flow Builder from External Services for MuleSoft (Pilot)

You can now import your MuleSoft Anypoint Platform APIs in a few clicks with the External Services for MuleSoft wizard. Every endpoint is then converted into an action within your organization and immediately available in Flow Builder.

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



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk. You can provide feedback and suggestions for the External Services for MuleSoft wizard in the Trailblazer Community.

#### SEE ALSO:

Use External Services for MuleSoft to Generate Actions in Flow Builder (Pilot)

# Flow and Process Release Updates

Enforce the running user's data access when Flow Builder uses a merge field to access a field on a related record. 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.

#### IN THIS SECTION:

## Enforce Data Access in Flow Merge Fields (Update, Enforced)

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.

#### Accurately Measure the CPU Time Consumption of Flows and Processes (Previously Released 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.

#### 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.

#### Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update was released in Summer '19 and scheduled for enforcement in Summer '20 but was then postponed to Winter '21 and again to Winter '22. The update is again postponed to Summer '23. 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.

#### Analyze Screen Flow Usage (Previously Released 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.

#### 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.

#### 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.

## Enforce Data Access in Flow Merge Fields (Update, Enforced)

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 Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Enforce Data Access in Flow Merge Fields (Update, Postponed)

# Accurately Measure the CPU Time Consumption of Flows and Processes (Previously Released 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 Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Accurately Measure the CPU Time Consumption of Flows and Processes (Update)

# 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 Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Previously Released Update)

## Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update was released in Summer '19 and scheduled for enforcement in Summer '20 but was then postponed to Winter '21 and again to Winter '22. The update is again postponed to Summer '23. 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 Summer '23 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 Update Announcements** 

Flow and Process Release Updates

Spring '21 Release Notes: Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

## Analyze Screen Flow Usage (Previously Released 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 Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Analyze Screen Flow Usage (Update)

# 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 <code>Release Updates</code>, and select

**Release Updates**. For Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas, follow the testing and activation steps.

SEE ALSO:

Release Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (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.

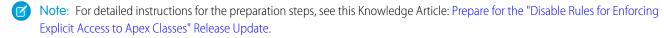


#### Note:

- 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.



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 Update Announcements

Flow and Process Release Updates

Spring '21 Release Notes: Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

# Flow and Process Run-Time Improvements in API Version 52.0

These updates affect only flows and processes that are configured to run on API version 52.0 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.

#### Sort and limit data in a collection with the Collection Sort element

This versioned update enables the Collection Sort element in flows that run in API versions 50.0 or later.

#### Filter system fields or other read-only fields when creating or updating records

The Filter inaccessible fields from flow requests process automation setting is now permanently enabled for all flows. You can change the setting only for flows that are configured to run on API version 51.0 or earlier.

For details, see Permanently Filter Read-Only Fields in Flow Builder.

#### Get merge field improvements in flows

Field-level access is now enforced, and performance such as page-load time is faster for merge fields that reference formula values.

In a screen flow, a merge field now returns a null value more consistently when field-level access is enforced. For example, a user who doesn't have access to a record uses a merge field to reference a field value that isn't returned from a formula. The merge field now returns a null value.

When a merge field references a data type value that isn't supported, we now show an error message. When a merge field references a number value on a complex data object such as an account record or a custom Apex object, the field now returns the number value. And this field doesn't convert it to a decimal value.

When you use a merge field to reference a group via a record variable field such as {!\$Record.Owner:Group.DeveloperName}, the merge field can access the value for the group at run time. In API version 51.0 or earlier, the merge field can't access the value, and the flow returns the error: Error resolving \$Record.Owner:Group.Id because it hasn't been set or assigned.

#### Automatically prepend -- None-- to Picklist components at run-time

For flows that run in API version 52 and later, this versioned update prepends the --None-- picklist value to all picklist components when the flow runs.

#### Show values only for active currencies

If you enabled multiple currencies, a screen flow now shows values only for active currencies. Previously, active and inactive currencies appeared as options.

#### Get accurate percent formula field values for related objects in Get Records elements

When you use a Get Records element to access a related object's percent-type formula field, it now returns an accurate value. In API version 51.0 or earlier, percent-type formula fields accessed in a Get Records element for a related object weren't divided by 100 and returned incorrect values.

#### Execute Record Update elements in bulk after loops for all Flow trigger types

For flows that run in API version 52 and later, CRUD operations and actions are fully bulkified after loops for all Flow trigger types.

SEE ALSO:

Sort and Limit Data in a Collection
Control Picklist Requiredness More Accurately

## **Einstein Bots**

Help your bots reach more customers in the languages they use every day with language improvements in Input Recommender, language-based intent sets, and three new beta languages. With Article Answers, now in beta, you can create knowledge data categories to deliver knowledge articles to different groups of customers. Intent management bulk actions allow you to move utterances around with ease.

#### IN THIS SECTION:

#### Generate Utterances Fast and in Multiple Languages with Input Recommender (Beta)

Input Recommender is now easier to set up, and it supports multiple languages. This feature, which strengthens intent models using your existing Chat data, requires 75% fewer utterances, so you can get started even faster. Use the Language field to categorize utterances, and generate utterance recommendations in a specific language.

#### Give your Bot Knowledge Superpowers with Article Answers (Beta)

Now bot admins can use Article Answers to help their bots deliver answers from their knowledge articles. Article Answers delivers a conversational answer to customer questions and includes selected fields from the knowledge article. This feature, now beta, includes smart updates such as Knowledge Data Category Segments, allowing you to bundle knowledge categories tailored to your customer segments. Use Lightning web components to display rich text answers or add rich content to messages: images, html, and more.

#### Launch Intent Models with Fewer Utterances

Einstein Bots now needs fewer utterances to build an intent model, allowing you to get started with Natural Language Processing in record time. Now you can build an intent model with as few as 20 utterances for each intent.

#### Get New NLP Languages for Einstein Bots (Beta)

More languages for Einstein Bots means you can reach out to your customers in the languages they prefer. Einstein Bots now supports Danish, Korean, and Swedish for Natural Language Processing in beta.

### Build Bots Faster with Intent Management Improvements

The upgraded intent management experience in the Einstein Bot Builder helps you quickly expand your bot. Dialog cloning now supports an option to include the attached utterance. And you can move utterances in bulk between intents or to an intent set.

#### Create Smarter Intent Models with Language-Based Intent Sets

Do more with intent sets by using language tagging on utterances. An intent set can now contain multiple languages and you can bulk assign utterances to a new language. Bot training focuses on the utterances that match the bot's language, so your model adjusts to fit your customers.

#### Say Yes to Boolean Support Upgrades

The upgraded Einstein Bots language models understand your customers better when they say some variation of yes or no. Enhanced boolean support in English helps capture the many ways that your customers respond to a question. Multilingual boolean support, now in beta, allows your bots to understand when your customers say yes or no in more than a dozen languages.

SEE ALSO:

Einstein Release Notes

# Generate Utterances Fast and in Multiple Languages with Input Recommender (Beta)

Input Recommender is now easier to set up, and it supports multiple languages. This feature, which strengthens intent models using your existing Chat data, requires 75% fewer utterances, so you can get started even faster. Use the Language field to categorize utterances, and generate utterance recommendations in a specific language.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.

**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 activate Input Recommender, your profile must have View All access on the Chat Transcript object.
- Input Recommender requires at least 2,500 Chat Transcript records per language to deliver high-quality recommendations.
- Input Recommender supports these languages: Dutch, English, French, German, and Spanish.



**Note:** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

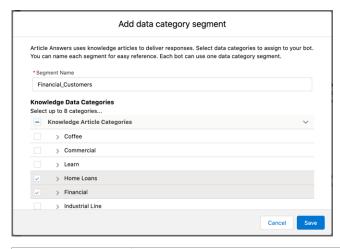
# Give your Bot Knowledge Superpowers with Article Answers (Beta)

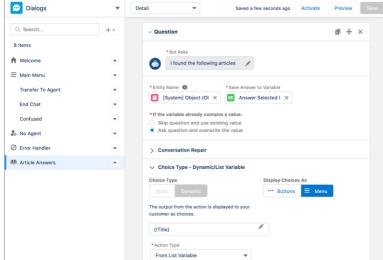
Now bot admins can use Article Answers to help their bots deliver answers from their knowledge articles. Article Answers delivers a conversational answer to customer questions and includes selected fields from the knowledge article. This feature, now beta, includes smart updates such as Knowledge Data Category Segments, allowing you to bundle knowledge categories tailored to your customer segments. Use Lightning web components to display rich text answers or add rich content to messages: images, html, and more.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.

**How:** From Setup, in the Quick Find box, enter *Einstein Bots*, select **Einstein Bots**, and then click **Get Started** next to Article Answers.





Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

## Launch Intent Models with Fewer Utterances

Einstein Bots now needs fewer utterances to build an intent model, allowing you to get started with Natural Language Processing in record time. Now you can build an intent model with as few as 20 utterances for each intent.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.

Note: Einstein Bots intent models with 20 utterances per intent support the following languages: Brazilian Portuguese, English, French, German, Italian, Portuguese, and Spanish. Any language listed as a supported language in Create a Bot for a Specific Language but not included in the 20 utterance support requires at least 50 utterances per intent.

# Get New NLP Languages for Einstein Bots (Beta)

More languages for Einstein Bots means you can reach out to your customers in the languages they prefer. Einstein Bots now supports Danish, Korean, and Swedish for Natural Language Processing in beta.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

# **Build Bots Faster with Intent Management Improvements**

The upgraded intent management experience in the Einstein Bot Builder helps you quickly expand your bot. Dialog cloning now supports an option to include the attached utterance. And you can move utterances in bulk between intents or to an intent set.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.

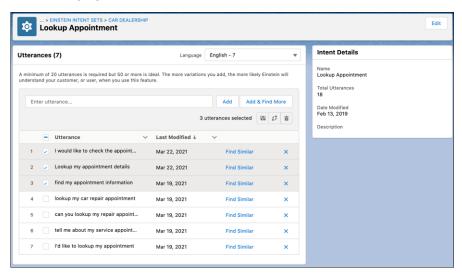
# Create Smarter Intent Models with Language-Based Intent Sets

Do more with intent sets by using language tagging on utterances. An intent set can now contain multiple languages and you can bulk assign utterances to a new language. Bot training focuses on the utterances that match the bot's language, so your model adjusts to fit your customers.

**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: This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.

**How:** From Setup, in the Quick Find box, enter *Einstein Intent Sets* to view all installed intent sets. Click an intent set to access the language and bulk action tools.



# Say Yes to Boolean Support Upgrades

The upgraded Einstein Bots language models understand your customers better when they say some variation of yes or no. Enhanced boolean support in English helps capture the many ways that your customers respond to a question. Multilingual boolean support, now in beta, allows your bots to understand when your customers say yes or no in more than a dozen languages.

**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:** This feature requires one of these permissions: Customize Application, Modify Metadata, or Manage Bots.





**Note**: Multilingual boolean support is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

# Flow Orchestrator (Pilot)

Orchestrate complex, multi-step, and multi-assignee business processes. Display orchestrated work items to assignees on relevant record pages.

#### IN THIS SECTION:

### Combine Multiple Flows into Unified Processes with Flow Orchestrator (Pilot)

Flow Orchestrator is a new tool that lets you create orchestrations, which are multi-step processes that interact with multiple users. Each orchestration is an ordered list of screen flows, each assigned to a specific user, that shares a single lightning page component. Use Flow Orchestrator to create advanced approval systems, group to-do lists, or any other business processes that require multiple users to complete assigned actions on the same record.

# Combine Multiple Flows into Unified Processes with Flow Orchestrator (Pilot)

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



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk. You can provide feedback and suggestions for Flow Orchestrator in the Trailblazer Community.

Who: To use Flow Orchestrator, users need the Manage Flow permission.

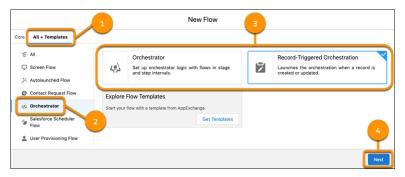
**Why:** Built on Salesforce Flow, orchestrations can replace your existing approval processes and workflow-powered task chains. You can create multiple screen flows, one for each approval or task, and then create an orchestration that binds them together into an automated list customized to match your business processes.

Flow Orchestrator also simplifies your Lightning pages by only showing users the flow in the step that's currently assigned to them. You don't need multiple flow components on a single Lightning page. A single Flow Orchestrator Work Guide component displays the relevant flow to the correct user when it's needed, no matter which orchestration it comes from.

**How:** If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

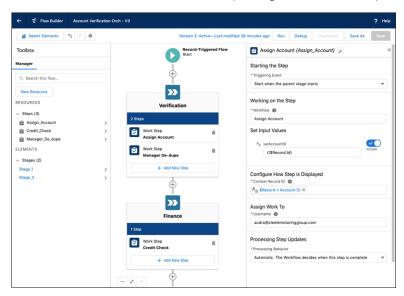
Orchestrations consist of stages and steps. Stages contain steps, providing structure and controlling where users are in the overall business process. Each stage can have multiple steps, and each step launches one screen flow.

To create an orchestration, go to the Flows page in Setup and click **New Flow**.



Select the All + Templates tab (1), then select **Orchestrator** (2). Choose the type of orchestration that you want to create (3), then click **Next** (4).

Click to add a stage. To add steps within that stage, click **Add New Step**. Click a step to set its triggering event, which screen flow it launches, the associated record, who the step is assigned to, and if the step runs a separate autolaunched flow when it's completed.



To display assigned steps to users, add the Flow Orchestrator Work Guide component to the relevant Lightning pages. This component shows the current step's flow to the currently assigned user, but only on the record configured in the step's Context Record ID.

# **Experience Cloud**

Maintain site continuity at all times with the new Service Not Available page, and protect your brand and site security with a dedicated CDN certificate. The Build Your Own (LWR) template is now more widely available, and with it, you can take advantage of a new branding system that includes color palettes for page sections. And we bid farewell to Internet Explorer 11, which is no longer supported.



Tip: The recent rename to Experience Cloud introduced some new terminology, and it can be tricky to know what's what. Here's the rundown.

- Experience Builder sites (formerly called Lightning communities) are template-based sites that you customize in Experience Builder. And with the launch of the Lightning Web Runtime (LWR), we added two new terms for even greater clarity.
  - LWR sites are built with the latest LWR-based templates, such as the Build Your Own (LWR) template.
  - Aura sites are built with our original templates, such as Customer Service, Partner Central, and Customer Account Portal, which run on Aura.
- Salesforce Tabs + Visualforce sites are sites that you develop using Visualforce.

So to help identify which new features apply to your sites, we use the terms *LWR sites*, *Aura sites*, and *Visualforce sites* in these release notes.

#### IN THIS SECTION:

#### **Experience Builder Sites**

Maintain the continuity of your site with the new Service Not Available page, and redirect visitors from one page to another without losing the SEO discoverability of your site.

#### **Developer Productivity**

Develop and brand LWR sites more efficiently with the enhanced Build Your Own (LWR) template, and protect your brand and site security with a dedicated CDN certificate.

#### **Guest User Security**

Grant access to records owned by high-volume customers to unauthenticated guest users. And update the email address used on the guest site user record to safeguard data.

#### Security and Sharing

Protect your Experience Cloud users and visitors to your site.

#### Other Changes

Learn about smaller changes that improve Experience Cloud.

# **Experience Builder Sites**

Maintain the continuity of your site with the new Service Not Available page, and redirect visitors from one page to another without losing the SEO discoverability of your site.

#### IN THIS SECTION:

#### End of Support for Internet Explorer 11 in Experience Builder Sites

Extended Support for IE11 for Experience Builder sites ended on December 31, 2020. Users trying to access Experience Builder sites with IE11 see a window informing them that they're using an outdated browser, and to either update or use another browser for a better experience. New features are supported and available only on modern browsers.

#### Maintain Business Continuity with the Customizable Service Not Available Page (Generally Available)

We strive to always maintain the continuity of your site, but we've also got you covered on the rare occasion that your site's down. Even if your site is unavailable, you can still keep in touch with customers, maintain brand continuity, and create cases. Use the Service Not Available page in Experience Builder to configure a message and image that fits your brand. Include Email-to-Case directly from the Service Not Available page to continue to receive cases from customers. The Service Not Available page is displayed to customers when your site is unavailable, but doesn't change the experience of your customers when the site is available.

#### Redirect Users to Your Experience Builder Sites

Now you can redirect users from a non-Salesforce site URL to an Experience Builder site URL on the same domain. This feature also retains the discoverability and SEO equity of your web pages.

#### Control Duplicate Content Search Using a Canonical URL

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site.

#### Add Assistive Text to Images on Experience Builder Sites

Assistive text helps blind and low-vision users with screen readers to better understand an image appearing on the page. Your users can now add assistive text when they add an image to an Experience Builder site with forums or feeds.

#### See Asset Status via the Path Component

Add the Path component to asset pages, and allow site users to see its status.

#### Show Model Cards and Customize Time-Based Predictions in the Einstein Predictions Component

Allow users to view the model card associated with the predictions they see. Calculate time-based predictions using a relative start date. Format the prediction to show as the time remaining, or as a date.

# End of Support for Internet Explorer 11 in Experience Builder Sites

Extended Support for IE11 for Experience Builder sites ended on December 31, 2020. Users trying to access Experience Builder sites with IE11 see a window informing them that they're using an outdated browser, and to either update or use another browser for a better experience. New features are supported and available only on modern browsers.

**Where:** This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. LWR sites never supported IE11.

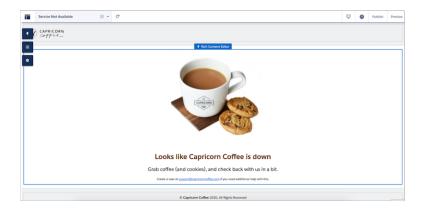
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We strive to always maintain the continuity of your site, but we've also got you covered on the rare occasion that your site's down. Even if your site is unavailable, you can still keep in touch with customers, maintain brand continuity, and create cases. Use the Service Not Available page in Experience Builder to configure a message and image that fits your brand. Include Email-to-Case directly from the Service Not Available page to continue to receive cases from customers. The Service Not Available page is displayed to customers when your site is unavailable, but doesn't change the experience of your customers when the site is available.

**Where:** This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This feature is available for sites that have enabled the standard content delivery network (CDN) system and are using the following templates: Build Your Own (LWR), B2C (LWR), Partner Central, B2B Commerce, Customer Service, Build Your Own, Help Center, and Customer Account Portal.

How: Use the HTML Editor component in Experience Builder to customize the Site Not Available page. You can add a Rich Content Editor component to the page to add your own text and images. You can include Email-to-Case, to let users create cases when the site is down. Alternatively, you can include Email-to packages from AppExchange to have customers create records for other objects while your site is unavailable. The Service Not Available page isn't enabled for sites that are already using a custom static resource. Go to Experience Builder > Administration > Pages and select Use the auto-generated Service Not Available page in Experience Builder to switch to the Experience Builder Service Not Available page from a custom static resource. If you're using both Experience Builder and Visualforce sites, you can display the same Service Not Available page in both places. After you save your customized Experience Builder Service Not Available page, you can add it to your Visualforce site as a static resource.





**Note:** If you're using the Service Not Available page in a scratch org, add PublishExpBuilderBasedSna and PublishAuraExpBuilderBasedSna features to your scratch org configuration.

# Redirect Users to Your Experience Builder Sites

Now you can redirect users from a non-Salesforce site URL to an Experience Builder site URL on the same domain. This feature also retains the discoverability and SEO equity of your web pages.

**Where:** This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

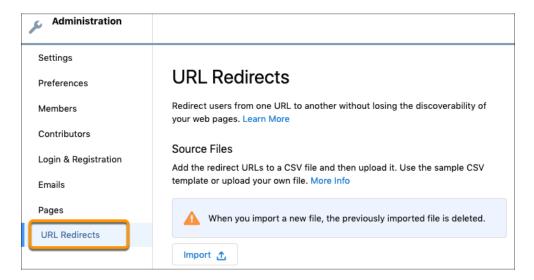
**How:** Use this feature to redirect your users from pages outside of Salesforce to Experience Builder pages on the same domain. This feature also maintains the discoverability and SEO equity of your sites when you migrate your pages onto Experience Cloud.

To set up URL redirects, in Experience Workspaces, first click **Administration**. From the URL Redirects page, add the source and target URLs to a CSV file.



**Note**: The source URL is the page outside of Salesforce. The target URL is the Experience Builder site where you want to redirect your users.

If you're not sure where to start, you can use the sample CSV template to add your URLs. Then, click **Import** to upload your file.



When the file size is 10,240 bytes or smaller and uploads successfully, a summary of your most recent import appears on the URL Redirects page.

When the file size is greater than 10,240 bytes, or if the total number of URLs previously imported is over 100, you receive an email to notify you of the status of your import.



Note: Importing a new CSV file overwrites the redirect file you previously imported. If you want to add URLs to an existing imported URL list, we recommend that you export and add the new URLs to your existing file. Then import the CSV file again.

# Control Duplicate Content Search Using a Canonical URL

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site.

Where: This change applies to Aura and LWR sites on page 351 accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Without canonicalization, search engines consider all of your identical or similar URLs as unique pages, which can cause several SEO issues.

- Search engines can miss your unique content.
- Too much duplicate content can dilute content ranking.
- Ranked content doesn't reflect the best URL.

How: To set up a canonical URL for a standard page, open the Experience Builder Page Properties tab. Select the SEO tab, then Edit Head Tags. Enter the properties as shown with your canonical URL.

```
<link rel="canonical" href="https://mysite.com/s/canonicalURL">
```

For Record pages with dynamic data, we recommend that you create a custom field for the object to store the canonical URL. See Canonical URL Tags for more information.

SEE ALSO:

**SEO Page Properties** 

Make Objects Available for SEO

# Add Assistive Text to Images on Experience Builder Sites

Assistive text helps blind and low-vision users with screen readers to better understand an image appearing on the page. Your users can now add assistive text when they add an image to an Experience Builder site with forums or feeds.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: When users add an image in posts or comments, they see a new Assistive Text field. The field is automatically filled with the image's name, and users can change the assistive text to add details if needed.

# See Asset Status via the Path Component

Add the Path component to asset pages, and allow site users to see its status.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

# Show Model Cards and Customize Time-Based Predictions in the Einstein Predictions Component

Allow users to view the model card associated with the predictions they see. Calculate time-based predictions using a relative start date. Format the prediction to show as the time remaining, or as a date.

**Where:** This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** The Einstein Predictions component is available for customers with either the Tableau CRM Plus license or the Einstein Predictions license, each of which is available for an extra cost. To view predictions on a page, users must have the View Einstein Discovery Recommendations permission assigned to their Salesforce account.

#### SEE ALSO:

*Salesforce Help*: Einstein Predictions (can be outdated or unavailable during release preview) Increase Prediction Transparency with Model Cards (Generally Available)

Show Time-Based Predictions Using Relative Start Dates

# **Developer Productivity**

Develop and brand LWR sites more efficiently with the enhanced Build Your Own (LWR) template, and protect your brand and site security with a dedicated CDN certificate.

#### IN THIS SECTION:

#### Build Your Own (LWR) Is Available to All

The Build Your Own (LWR) template is now available in all supported editions without purchasing Salesforce CMS. Previously, the template was available in Developer Edition or when you purchased Salesforce CMS in Enterprise, Performance, and Unlimited editions.

#### Brand Your LWR Sites More Easily

LWR sites, such as sites created with the Build Your Own (LWR) template, now include a Theme area with extensive branding properties. Build out your site with color palettes, Salesforce CMS images, and text styles to reflect the best version of your brand.

#### Use --dxp Styling Hooks to Brand Your Lightning Web Components (Generally Available)

Lightning Web Runtime (LWR) includes a new branding system that uses --dxp styling hooks. With the new system, you can modify base and custom Lightning web components more easily to achieve a consistent look and feel across your LWR site.

#### Use Privileged Script to Bypass Shadow DOM in LWR Sites

With Privileged Script, third-party JavaScript libraries can access components in LWR sites. An LWR site encapsulates all of its elements in Shadow DOM, which prevents third-party libraries from interacting with the components. This script lets libraries, such as Google Analytics and Google Tag Manager, bypass Shadow DOM.

#### Improve Your Site's Performance with a Dedicated Certificate for Your CDN (Generally Available)

Adopt a single certificate content delivery network (CDN) to protect your brand and site's security. When you purchase Salesforce CMS or an Experience Cloud license, you get 10 single domain certificates for the CDN and 48 terabytes of traffic, an increase from 5 terabytes. The CDN manages the certificate for you, so you can set it and forget it.

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

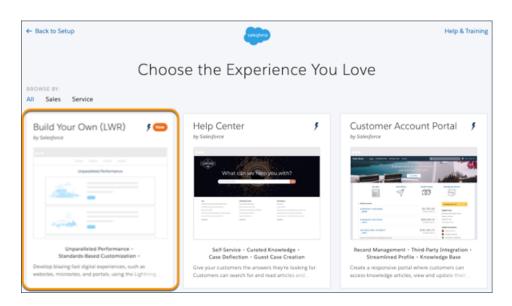
Now when your users make API calls from a site with nicknames enabled, you can hide the first and last name fields in SOAP API for Experience Cloud site users.

# Build Your Own (LWR) Is Available to All

The Build Your Own (LWR) template is now available in all supported editions without purchasing Salesforce CMS. Previously, the template was available in Developer Edition or when you purchased Salesforce CMS in Enterprise, Performance, and Unlimited editions.

**Where:** This change applies to Lightning Experience and Salesforce Classic. The template is available in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Use this customizable template, powered by the new Lightning Web Runtime (LWR), to develop blazing fast digital experiences, such as websites, microsites, and portals.





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.

SEE ALSO:

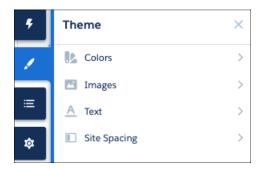
LWR Sites for Experience Cloud Developer Guide (can be outdated or unavailable during release preview)

# Brand Your LWR Sites More Easily

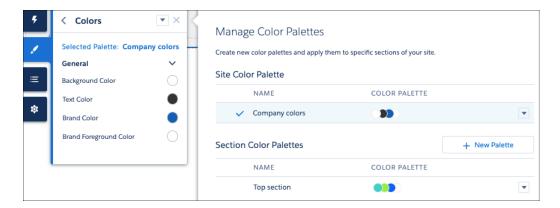
LWR sites, such as sites created with the Build Your Own (LWR) template, now include a Theme area with extensive branding properties. Build out your site with color palettes, Salesforce CMS images, and text styles to reflect the best version of your brand.

**Where:** This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

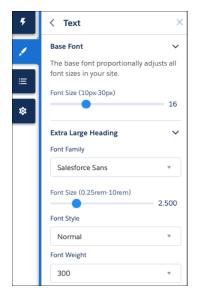
**How:** In Experience Builder, open the Theme panel, and select from various color, image, text, and site spacing properties.

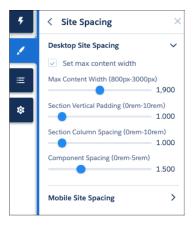


Make your pages more engaging by creating color palettes, which differ from the main site colors, and applying them to specific sections of the page. And in the Images tab, select images from a Salesforce CMS workspace to create a logo or a browser icon (favicon).



From the Text tab, select from dynamic font styles, headings, and decorations for all types of text, including links and buttons. Add a custom font to your site by clicking **Settings** > **Advanced** > **Edit Head Markup** and defining the custom font family name in the Head Markup. Also, adjust your site's maximum content width, section padding, and section column and component spacing for desktop and mobile views.







Tip: Each property in the Theme panel maps to our new --dxp styling hooks, which you can use when creating custom Lightning web components.

# Use --dxp Styling Hooks to Brand Your Lightning Web Components (Generally Available)

Lightning Web Runtime (LWR) includes a new branding system that uses --dxp styling hooks. With the new system, you can modify base and custom Lightning web components more easily to achieve a consistent look and feel across your LWR site.

**Where:** This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** The Salesforce Lightning Design System (SLDS) currently uses styling hooks for base components. Styling hooks use CSS custom properties, which are variables within your CSS that cascade to all descendents within the scope of a selector.

Accurately reflecting your brand across every component in your site, including associated variations and states, often requires hundreds of styling hook definitions. But the new --dxp styling hooks are a reduced set of custom properties that map to the lower-level component styling hooks. So you can set a single hook that affects many individual components and brand an entire site much more easily.

Let's say you want to develop a custom button component that uses branding properties from the new Theme panel for LWR sites. Each property in the Theme panel maps to --dxp styling hooks. In this case, to use the site's Brand Color as the background color of the button, the component references the --dxp-g-brand global styling hook.



```
.my-custom-button-component {
  background-color: var(--dxp-g-brand);
  color: var(--dxp-g-brand-contrast);
}
```

And if a user updates the Brand Color property in the Theme panel, the system automatically updates any Lightning web components that use the hooks associated with that property.

**How:** To use the --dxp styling hooks in LWR sites created before Summer '21, add the DXP branding style sheets. New LWR sites created in Summer '21 automatically include these style sheets.

Click **Settings** > **Advanced** > **Edit Head Markup**, and include this code in the Head Markup editor:

```
<link rel="stylesheet" href="{ basePath
}/assets/styles/salesforce-lightning-design-system.min.css?{ versionKey }" />
<link rel="stylesheet" href="{ basePath
}/assets/styles/dxp-site-spacing-styling-hooks.min.css?{ versionKey }" />
<link rel="stylesheet" href="{ basePath }/assets/styles/dxp-styling-hooks.min.css?{
versionKey }" />
```

<link rel="stylesheet" href="{ basePath }/assets/styles/dxp-slds-extensions.min.css?{
versionKey }" />



Tip: If you create a custom Lightning web component that uses --dxp styling hooks for use in an LWR site, you can also use the component in Aura sites. Although the Theme panel for Aura sites contains different branding properties, these properties map sufficiently to the new styling hooks.

# Use Privileged Script to Bypass Shadow DOM in LWR Sites

With Privileged Script, third-party JavaScript libraries can access components in LWR sites. An LWR site encapsulates all of its elements in Shadow DOM, which prevents third-party libraries from interacting with the components. This script lets libraries, such as Google Analytics and Google Tag Manager, bypass Shadow DOM.

**Where:** This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

LWR Sites for Experience Cloud Developer Guide (can be outdated or unavailable during release preview)

# Improve Your Site's Performance with a Dedicated Certificate for Your CDN (Generally Available)

Adopt a single certificate content delivery network (CDN) to protect your brand and site's security. When you purchase Salesforce CMS or an Experience Cloud license, you get 10 single domain certificates for the CDN and 48 terabytes of traffic, an increase from 5 terabytes. The CDN manages the certificate for you, so you can set it and forget it.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience, Salesforce Classic, and Mobile in Enterprise, Performance, and Unlimited editions.

**Who:** This change applies to users who have purchased CMS or are using Customer Community, Customer Community Plus, Partner Community, and External Apps licenses.

**How:** When you configure your site's domain, choose the single certificate domain option. Contact your account executive for additional branded certificates and to increase your traffic allowance.

# 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 Aura, LWR, and Visualforce 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.

# **Guest User Security**

Grant access to records owned by high-volume customers to unauthenticated guest users. And update the email address used on the guest site user record to safeguard data.

#### IN THIS SECTION:

### Grant Unauthenticated Guest Users Access to Records Owned by High-Volume Users

Choose whether to include records owned by high-volume community or site users when you create guest user sharing rules. By default, guest user sharing rules include only records that match the rule's criteria and are owned by authenticated users, guest users, and queues. Because of security improvements in Experience Cloud sites, this setting is the only way to grant guest users access to records owned by high-volume users.

#### Update Guest User's Email Address (Update)

When you create an Experience Cloud or Salesforce site, Salesforce automatically creates a guest site user. In any site created before the Summer '21 release, the email address for the site guest user record was that of the Salesforce user who created the site. After the Summer '21 release, the system generates a dummy email address to use in the guest site user record.

#### **Update Guest User Licensing**

Update your unauthenticated guest users in sites created before Spring '21 to the provisioned guest user license, which gets updated automatically.

# Grant Unauthenticated Guest Users Access to Records Owned by High-Volume Users

Choose whether to include records owned by high-volume community or site users when you create guest user sharing rules. By default, guest user sharing rules include only records that match the rule's criteria and are owned by authenticated users, guest users, and queues. Because of security improvements in Experience Cloud sites, this setting is the only way to grant guest users access to records owned by high-volume users.

**Where:** This change applies to all Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This option is available only if you have high-volume users. High-volume users include the External Apps, Customer Community, High Volume Customer Portal, and Authenticated Website license types.

**How:** From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**. In the Sharing Rules related list for the object, click **New** and select the **Guest user access, based on criteria** rule type. After you specify the criteria, to share records owned by high-volume users, select **Include records owned by high-volume users**.

This option is available only for guest user sharing rules, not for owner-based or criteria-based sharing rules. You can't edit this checkbox after the sharing rule is created.

#### SEE ALSO:

Salesforce Help: About High-Volume Community or Site Users (can be outdated or unavailable during release preview)
Salesforce Help: Create Guest User Sharing Rules (can be outdated or unavailable during release preview)

# Update Guest User's Email Address (Update)

When you create an Experience Cloud or Salesforce site, Salesforce automatically creates a guest site user. In any site created before the Summer '21 release, the email address for the site guest user record was that of the Salesforce user who created the site. After the Summer '21 release, the system generates a dummy email address to use in the guest site user record.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** For sites created before the Summer '21 release, check the guest site user record for each site to ensure that the email used can be exposed publicly. The email address used for creating the guest site user record doesn't have a functional purpose, other than creating the record. Use an email address that isn't sensitive to public exposure.

Check the Release Updates in your org for more details on how to change your sites' guest user record email addresses.

# **Update Guest User Licensing**

Update your unauthenticated guest users in sites created before Spring '21 to the provisioned guest user license, which gets updated automatically.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Update Site Guest Users to the Latest License

# Security and Sharing

Protect your Experience Cloud users and visitors to your site.

#### IN THIS SECTION:

#### Secure HTTPS Connections Are Enforced in Experience Cloud Sites and Salesforce Sites

Settings that enforce HTTPS connections or upgrade HTTP requests were enabled and removed because they're required and enforced by default. These changes apply to all sites, regardless of whether they're served on a custom domain. We recommend that you allow HSTS preloading registration for custom domains that host content through your sites, which adds protection by removing the opportunity for attacks during HTTP redirections.

#### Protect Customers During the Login Process

Protect your customers after they successfully log in to your Experience Cloud site with Embedded Login by blocking redirects to unknown URLs.

#### Protect Experience Cloud Users by Verifying Email Address Changes

To protect user accounts against security threats, Salesforce now automatically enables the Require email confirmations for email address changes setting. With this setting enabled, Experience Cloud site users must verify their email address changes.

# Secure HTTPS Connections Are Enforced in Experience Cloud Sites and Salesforce Sites

Settings that enforce HTTPS connections or upgrade HTTP requests were enabled and removed because they're required and enforced by default. These changes apply to all sites, regardless of whether they're served on a custom domain. We recommend that you allow HSTS preloading registration for custom domains that host content through your sites, which adds protection by removing the opportunity for attacks during HTTP redirections.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: These settings were enabled and removed:

- Enable Strict Transport Security headers on the Domain Details page
- HSTS for Salesforce Sites and Experience Cloud Sites on the Session Settings page
- Require Secure Connections (HTTPS) on the Site Details page
- Upgrade all requests to HTTPS on the Site Details page

Because Health Check score calculations used these settings, this change can have a minor impact on your score.

### SEE ALSO:

Secure HTTPS Connections Are Enforced in Domains

Allow Only Secure Connections to Your Domain with HSTS Preloading

Salesforce Help: How Is the Health Check Score Calculated? (can be outdated or unavailable during release preview)

# Protect Customers During the Login Process

Protect your customers after they successfully log in to your Experience Cloud site with Embedded Login by blocking redirects to unknown URLs.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Block Customer Redirects to Unknown URLs

# Protect Experience Cloud Users by Verifying Email Address Changes

To protect user accounts against security threats, Salesforce now automatically enables the Require email confirmations for email address changes setting. With this setting enabled, Experience Cloud site users must verify their email address changes.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Unlimited, and Developer editions.

SEE ALSO:

Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Enforced)

# Other Changes

Learn about smaller changes that improve Experience Cloud.

#### IN THIS SECTION:

#### Use Tabbed Navigation in Mobile Publisher Apps

Make navigating your site on a mobile device simple with tabbed menus. The tabs are always displayed at the bottom of the screen, making navigation quick and easy (and even one-handed) on your mobile publisher apps.

### Improve Your Site's SEO

Improve your Experience Cloud site's Search Engine Optimization (SEO) by redirecting requests from your site's system-managed URL to the HTTPS custom domain that serves the site.

#### Improve Performance for Your Site's Authenticated Users

Improve your authenticated users' experience by caching your site's Visualforce pages on their web browsers.

### Enable Topics for Knowledge in Lightning Experience Setup

Topics organize knowledge articles and make them available for members in your Experience Cloud site. Now when enabling knowledge for your site, you can enable topics for knowledge and other objects conveniently in Lightning Experience Setup. This feature was previously available only in Salesforce Classic.

#### See All of a User's Activity on Their Profile Page

When viewing a user's profile feed, selecting the "All Updates" filter now also displays posts with comments they made in groups and on topic pages and records.

#### Create, Edit, and Delete Tasks with the Customer Community License

Update tasks with Customer Community licenses. Users can create, edit, and delete tasks that they own. They can also create tasks for other users and make updates on tasks that are shared with them.

# Use Tabbed Navigation in Mobile Publisher Apps

Make navigating your site on a mobile device simple with tabbed menus. The tabs are always displayed at the bottom of the screen, making navigation quick and easy (and even one-handed) on your mobile publisher apps.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed mobile publisher apps in Enterprise, Performance, Unlimited, and Developer editions.

# Improve Your Site's SEO

Improve your Experience Cloud site's Search Engine Optimization (SEO) by redirecting requests from your site's system-managed URL to the HTTPS custom domain that serves the site.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Redirect Site Traffic to Your Custom Domain

# Improve Performance for Your Site's Authenticated Users

Improve your authenticated users' experience by caching your site's Visualforce pages on their web browsers.

**Where:** This change applies to Visualforce pages for Experience Cloud sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Cache Your Site's Visualforce Pages for Authenticated Users

# Enable Topics for Knowledge in Lightning Experience Setup

Topics organize knowledge articles and make them available for members in your Experience Cloud site. Now when enabling knowledge for your site, you can enable topics for knowledge and other objects conveniently in Lightning Experience Setup. This feature was previously available only in Salesforce Classic.

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

SEE ALSO:

Enable Topics for Objects in Lightning Experience Setup

# See All of a User's Activity on Their Profile Page

When viewing a user's profile feed, selecting the "All Updates" filter now also displays posts with comments they made in groups and on topic pages and records.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

# Create, Edit, and Delete Tasks with the Customer Community License

Update tasks with Customer Community licenses. Users can create, edit, and delete tasks that they own. They can also create tasks for other users and make updates on tasks that are shared with them.

**Where:** This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change applies to the Customer Community and Customer Community Login license.

How: Enable Edit Task on the Customer Community and Customer Community Login profiles to grant this access to user.s

# Field Service

Start workers off on the right foot with paths to guide them and give them insights into asset setup status. Keep workers on track with guided steps for completing their work with work plans, and help service managers easily manage work plans by using templates for common work plans and work steps. Let Einstein recommend parts for work orders with Recommendation Builder, or use it to build a custom recommendation to meet your business needs.

#### IN THIS SECTION:

### Recommend Parts on Field Service Work Orders with a Recommendation Template

Build recommendations faster and smarter with Einstein Recommendation Builder. Use the preconfigured Parts to Work Order template to easily recommend parts for work orders. And adjust your settings to optimize the recommendation. Instead of using rules-based logic, build smarter recommendations with Einstein as it learns from past data.

#### Streamline Asset Setup and Celebrate Success with a Virtual Confetti Toss

Improve your customers' experience by creating a path on the Assets object that gives workers visibility into asset setup status. Acknowledge workers' progress with a virtual confetti toss as assets reach designated path stages.

#### Deliver Consistent Services with Work Plans (Generally Available)

Guide your field service team with prescribed steps in work plans to help them complete work orders. Front-line and back-office workers can complete assignments more quickly and with less guesswork.

#### Field Service Scheduling

Simplify rule violation checks by giving dispatchers more control. Pinpoint which workers are available for a job with more Extended Match work rules. Show dispatchers who's out for the day or week on the calendar to ease work scheduling. Create and assign shifts more efficiently with updated shift patterns.

### Field Service Mobile App

Simplify selecting and sharing multiple records for offline workers. Help mobile workers know when your company records and shares their location, and give customers better insight into their mobile workers' location.

# Recommend Parts on Field Service Work Orders with a Recommendation Template

Build recommendations faster and smarter with Einstein Recommendation Builder. Use the preconfigured Parts to Work Order template to easily recommend parts for work orders. And adjust your settings to optimize the recommendation. Instead of using rules-based logic, build smarter recommendations with Einstein as it learns from past data.

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

Who: This feature is available with the Service Cloud Einstein and Lightning Platform Plus licenses.

**How:** From Setup, in the Quick Find Box, enter *Field Service Settings*, then enable your Einstein Recommendation Builder field service settings and save. In Einstein Recommendation Builder, build a template-based or custom recommendation. Choose Parts to Work Orders. After the recommendation builds, review your results in the scorecard. Access your recommendation from the Setup list view.

# Streamline Asset Setup and Celebrate Success with a Virtual Confetti Toss

Improve your customers' experience by creating a path on the Assets object that gives workers visibility into asset setup status. Acknowledge workers' progress with a virtual confetti toss as assets reach designated path stages.

**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: Guide Users with Path (can be outdated or unavailable during release preview)

# Deliver Consistent Services with Work Plans (Generally Available)

Guide your field service team with prescribed steps in work plans to help them complete work orders. Front-line and back-office workers can complete assignments more quickly and with less quesswork.

**Where:** This feature is available in Lightning Experience and all versions of the mobile app in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Work Plans Settings, select **Generate Work Plans and Work Steps from templates and selection rules**. Then edit Page Layouts for work order objects and use Lightning App Builder to add the Work Plan Lightning component.

Service managers can then create work plans for work orders from work plan templates and work step templates. Work step templates help reuse common steps across plans. They can also add selection rules to automate how work plans are assigned to work orders.

SEE ALSO:

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

# Field Service Scheduling

Simplify rule violation checks by giving dispatchers more control. Pinpoint which workers are available for a job with more Extended Match work rules. Show dispatchers who's out for the day or week on the calendar to ease work scheduling. Create and assign shifts more efficiently with updated shift patterns.

#### IN THIS SECTION:

#### Streamline Scheduling by Limiting Rule Validation Checks

Manage the frequency and triggers of your automatic rule violation checks and let dispatchers validate rules on demand for more efficient scheduling. With custom permissions, dispatchers can manually check rules for service appointments from the Gantt chart or list, or they can use the Check Rules button for all loaded services.

### Improve the Worker-Service Match When Scheduling Appointments

To refine the list of candidates available for scheduling and optimizing service appointments, you can apply up to five Extended Match work rules to your scheduling policy.

### Offload Sandbox Services for Routing and Optimization

Configure your Salesforce sandboxes to use independent remote sites for street-level routing (SLR) and optimization services. To keep Salesforce production running smoothly, sandboxes are now required to use the dedicated remote sites that were added in Winter '21 for SLR and optimization services.

### Show Absences Next to Appointments and Shifts on the Calendar

Dispatchers can now see worker absences on the shift calendar, whether they're planned or unexpected, so that they can schedule shifts more accurately.

#### Add More Info When You Create Shifts From a Pattern

Creating shifts is even easier with the latest updates to shift patterns. Set more details up front, such as the shift status for the assigned resource, or use patterns up to 365 days in length. You can also assign a territory, a resource, or both when creating shifts from patterns.

# Streamline Scheduling by Limiting Rule Validation Checks

Manage the frequency and triggers of your automatic rule violation checks and let dispatchers validate rules on demand for more efficient scheduling. With custom permissions, dispatchers can manually check rules for service appointments from the Gantt chart or list, or they can use the Check Rules button for all loaded services.

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

**How:** In Field Service Settings, select **Dispatcher Console UI**, and then select **Gantt Configurations**. Under Rules Validation, set the rule validation frequency and control whether any indirect Gantt updates not made by the dispatcher trigger rule violation calculation. For existing Salesforce orgs, the default frequency is **Always**, for new orgs, the default is **On Demand**.

To enable dispatchers to manually check rules, from Setup, in the Quick Find box, enter *Users*, and then select **Permission Sets**. Click **Field Service Dispatcher Permissions**, and then select **Custom Permissions**. Click **Edit**, select and add the required permissions, and then save.

#### SEE ALSO:

Salesforce Help: Check Rule Violations on the Gantt (can be outdated or unavailable during release preview)
Salesforce Help: Set Custom Permissions for Field Service (can be outdated or unavailable during release preview)

# Improve the Worker-Service Match When Scheduling Appointments

To refine the list of candidates available for scheduling and optimizing service appointments, you can apply up to five Extended Match work rules to your scheduling policy.

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

**How:** You can add work rules to a scheduling policy from the Customize Scheduling Policies page in Guided Setup or from the Scheduling Policy Work Rules related list on a scheduling policy.

SEE ALSO:

Salesforce Help: Work Rule Type: Extended Match (can be outdated or unavailable during release preview)

# Offload Sandbox Services for Routing and Optimization

Configure your Salesforce sandboxes to use independent remote sites for street-level routing (SLR) and optimization services. To keep Salesforce production running smoothly, sandboxes are now required to use the dedicated remote sites that were added in Winter '21 for SLR and optimization services.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. It applies to sandboxes installed with the Field Service managed package before Winter '21.

**How:** From Setup, in the Quick Find box, enter *Remote Site Settings*, and then select **Remote Site Settings**. Activate the FSL\_GIS\_SB and FSL\_Optimize\_SB sites. Reauthenticate your optimization user and register street-level routing. To register SLR, in the Field Service Admin app, select the **Field Service Settings** tab and then select **Scheduling**. Select **Routing** and click the Register button if shown.

#### SEE ALSO:

Salesforce Help: Configure Remote Site Settings (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Optimization (can be outdated or unavailable during release preview)

Salesforce Help: Set Up After Sandbox Refresh (can be outdated or unavailable during release preview)

# Show Absences Next to Appointments and Shifts on the Calendar

Dispatchers can now see worker absences on the shift calendar, whether they're planned or unexpected, so that they can schedule shifts more accurately.

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

How: Select All Shifts or any other list view, then open the Schedule view from the Display dropdown menu.



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Click **Resources** to see resource vacations and other absences on the calendar along with appointments.

SEE ALSO:

Salesforce Help: View Your Shift Schedule (can be outdated or unavailable during release preview)

### Add More Info When You Create Shifts From a Pattern

Creating shifts is even easier with the latest updates to shift patterns. Set more details up front, such as the shift status for the assigned resource, or use patterns up to 365 days in length. You can also assign a territory, a resource, or both when creating shifts from patterns.

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

**How:** Use the New from Pattern action to see the status of assigned service resources and their territories. Create a set of repeating or date-defined shifts and use patterns for up to a year. Once you apply the pattern, this creates shifts based on the number of occurrences of the pattern. For example, a year long pattern that you apply for four occurrences creates shifts for four years. Also, you can now assign a resource without having to first assign a territory when creating shifts from patterns.

SEE ALSO:

Salesforce Help: Create Shifts from a Pattern (can be outdated or unavailable during release preview)

# Field Service Mobile App

Simplify selecting and sharing multiple records for offline workers. Help mobile workers know when your company records and shares their location, and give customers better insight into their mobile workers' location.

IN THIS SECTION:

#### Briefcase Builder (Generally Available)

Explore a better way to make offline record data available to your users with Briefcase Builder. Briefcase Builder helps you select records to share offline with Field Service workers by efficiently narrowing down record data based on the users and connected apps that you select. Now you can create an offline platform experience that is flexible, easy to use, and responsive to your mobile workers' needs.

### Increase Transparency About Location Sharing

Build trust among your mobile workers, who now get access to details in Location Settings about when your company records and shares their location.

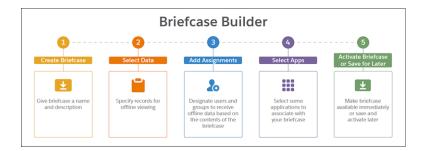
#### Improve Location Accuracy for Appointment Assistant

Give customers better insight into their mobile worker's location while waiting for their appointments. When workers travel to their appointments, Appointment Assistant updates their location every 60 seconds instead of the update frequencies that you established for geolocations in Settings.

# Briefcase Builder (Generally Available)

Explore a better way to make offline record data available to your users with Briefcase Builder. Briefcase Builder helps you select records to share offline with Field Service workers by efficiently narrowing down record data based on the users and connected apps that you select. Now you can create an offline platform experience that is flexible, easy to use, and responsive to your 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, select the objects, and apply filtering to retrieve only the records you want users to view offline. Then you can assign users and groups to view the briefcase, associate connected apps with your briefcase, and activate it immediately or later.

#### SEE ALSO:

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

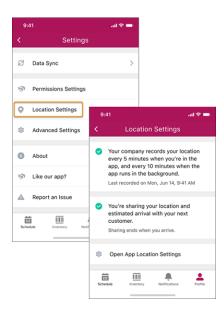
Salesforce Help: Offline Priming in the Field Service Mobile App (can be outdated or unavailable during release preview)

# Increase Transparency About Location Sharing

Build trust among your mobile workers, who now get access to details in Location Settings about when your company records and shares their location.

Where: This change applies to Field Service for iOS.

**How:** Mobile workers access their sharing details in Location Settings.



# Improve Location Accuracy for Appointment Assistant

Give customers better insight into their mobile worker's location while waiting for their appointments. When workers travel to their appointments, Appointment Assistant updates their location every 60 seconds instead of the update frequencies that you established for geolocations in Settings.

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

SEE ALSO:

Salesforce Help: Configure Geolocation Settings for Appointment Assistant (can be outdated or unavailable during release preview)

# **Industries**

Industry-specific solutions are more intelligent and more flexible. Financial Services Cloud helps manage consent and disclosure authorizations with the Intelligent Document Automation feature. Health Cloud simplifies and optimizes appointment scheduling with intelligent recommendations. Consumer Goods is more convenient than ever, with a setup assistant and desktop support for visit execution. Manufacturing Cloud makes it easier to revise sales agreements and filter forecasts and schedules. Loyalty Management lets you personalize promotions and customize and benefit actions, and Rebate Management delivers new ways to manage and calculate payouts. Public Sector Solutions introduces tools to automate data entry and mapping, improving quality and efficiency. Sustainability Cloud adds features for filtering and visualizing energy performance and emissions. Data Processing Engine, Decision Table, and Batch Management give you new fields and functionality for managing and leveraging your data.

#### IN THIS SECTION:

#### Financial Services Cloud

Improve team collaboration with the new Financial Deal Management data model. Manage consent and disclosure documents, generate authorization request forms, and track user responses using Intelligent Document Automation features. Track team output your own way with the Association Engine, which extends the work attribution capabilities of Branch Management. New options on the Policy component give you greater control over the information that's displayed. Add Einstein Relationship Intelligence to Actionable Relationship Center to easily view and add recommended records and relationships. In addition, take advantage of improvements to Action Plans, Interaction Summaries, and the Intelligent Form Reader.

#### Health Cloud

Introducing Intelligent Appointment Management, which automatically recommends the best appointment options so contact center and scheduling staff can increase first-call resolution and reduce no-shows. And get performance and usability enhancements to our robust provider search functionality.

#### Consumer Goods Cloud

Execute mobile capabilities on desktop using the Consumer Goods Visit Execution app. Easily configure Consumer Goods cloud with the Consumer Goods Setup assistant. Track store manager satisfaction by adding a signature task to a visit. Sales managers can check field reps' availability to avoid scheduling conflicts when assigning visits.

#### Manufacturing Cloud

Manage sales agreements and account forecasts easily with new features and enhancements. Revise active or approved sales agreements to include more products. Filter account forecasts and sales agreement schedules by time period. Update name, description, and contact details for an active, approved, canceled, or expired sales agreement. Update actual quantities of products for past schedules using the Manually using API upload option.

#### Loyalty Management

Get a holistic view of your loyalty program from the Home page. Use included templates to create a benefit action. Create and define input variables for benefit actions.

#### Rebate Management

Integrate rebates and benefit tiers directly with your CPQ processes and deal negotiations. Seamlessly create and manage end-to-end ship and debit programs. Reduce ambiguities related to revenues and liabilities by calculating the accrual amounts against rebate programs. Make rebate payouts based on account hierarchies by rolling up transactions for subaccounts. Easily convert units of measure for rebate transactions depending on the rebate program.

#### **Public Sector Solutions**

Speed up document-driven processes using Intelligent Document Automation and the Intelligent Form Reader to recognize and copy data from uploaded files. Inspection management enhancements improve the inspection experience. Public Sector portal changes improve tracking how complaints are handled.

### Sustainability

With added functionality in Sustainability Cloud, you can filter, analyze, and benchmark energy intensity performance by fuel type across your commercial buildings. And the data gap filling process is updated with two new methods. Added scope 3 value chain analysis now helps you categorize, visualize, and account for your company's scope 3 greenhouse gas emissions, along with new record types, page layouts, and fields for freight hauling, and much more.

#### Data Processing Engine

Use Data Processing Engine to learn about a field's hierarchy or its data trends. Upload or download a definition JSON. Delete definitions that you no longer use. Run a definition from the builder, and cancel a run at any time.

#### **Decision Table**

Define a condition that drives the input field logic to provide outcomes. Get data from multiple source objects in a dataset link.

#### **Batch Management**

Cancel Batch Management jobs at any time. Resubmit records that failed in a previous batch job run.

#### Einstein Relationship Insights

Discover critical relationships between people and companies and identify prospective customers and business opportunities by exploring disparate data sources. Extract insights from unstructured data on web pages and transform them into structured information such as Salesforce records. Use these insights to prioritize contacts and accounts, enrich leads, and increase your sales team's productivity. Build a network of people and companies that are relevant to your research and close deals faster.

### Intelligent Form Reader

Extract and store information from an external form into a Salesforce object using Intelligent Form Reader Metadata APIs and setup objects.

### Tap Into Common Industries Developer Resources

Some Industries clouds have components, such as objects, invocable actions, APIs, and events, that can be useful for two or more clouds. We've built a central place where you can learn about these multi-purpose components and how to put them to work automating processes for your vertical.

# **Financial Services Cloud**

Improve team collaboration with the new Financial Deal Management data model. Manage consent and disclosure documents, generate authorization request forms, and track user responses using Intelligent Document Automation features. Track team output your own way with the Association Engine, which extends the work attribution capabilities of Branch Management. New options on the Policy component give you greater control over the information that's displayed. Add Einstein Relationship Intelligence to Actionable Relationship Center to easily view and add recommended records and relationships. In addition, take advantage of improvements to Action Plans, Interaction Summaries, and the Intelligent Form Reader.

### IN THIS SECTION:

#### Financial Deal Management

Use the new Financial Deal Management feature to manage the lifecycle of a financial deal and to share the deal-related information with stakeholders in a compliant manner.

#### Branch Management and Association Engine (Beta)

With automated record linking, the new Association Engine makes work tracking and attribution easier. You can define rules for associating records such as leads and accounts with the branches or other entities that work with them. And reportable branch management objects give you insights on productivity and performance.

### Intelligent Document Automation

Manage consent and disclosure documents, generate authorization request forms, and track user responses using the new Intelligent Document Automation features. Consent and disclosure authorizations are important steps in many business processes. Examples of consent documents include annual privacy policies, or disclosure statements about the sharing of financial data.

#### **Interaction Summaries**

The Interaction Summaries component now offers better search capabilities for interaction summary records within the component. With the component now supported on mobile devices, bankers and financial advisors can capture and update interaction summaries on the go.

#### Insurance for Financial Services Cloud

New options on the Policy component give you greater control over the information that appears on the component.

#### Actionable Relationship Center (ARC)

Create account-contact relationships with person accounts, and choose to show or hide related lists in ARC.

### 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.

#### Customer 360 Guide for Retail Banking

Introducing the Customer 360 Guide for Retail Banking! Optimize your onboarding and service processes to become the bank your customers love. The assets in this guide help you build a vision and make a plan for digital transformation in the retail banking industry. Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

#### Other Financial Services Cloud Changes

Do more with other Financial Services Cloud enhancements.

### New and Changed Objects in Financial Services Cloud

Do more with new and updated Financial Services Cloud objects and fields.

#### **REST API**

Financial Services Cloud REST API includes enhanced calls.

### Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

# Financial Deal Management

Use the new Financial Deal Management feature to manage the lifecycle of a financial deal and to share the deal-related information with stakeholders in a compliant manner.

#### IN THIS SECTION:

#### Track and Manage a Financial Deal Lifecycle

Help deal teams effectively track a financial deal lifecycle with the new Financial Deal Management data model. They can manage every aspect of deal-related interactions and take advantage of compliant, role-based data sharing options.

#### Share Financial Deals with Multiple Users or Groups

Help deal teams easily share financial deals with multiple participants at a time in a compliant manner. When you add the new Manage Participant component to a financial deal record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record

# Track and Manage a Financial Deal Lifecycle

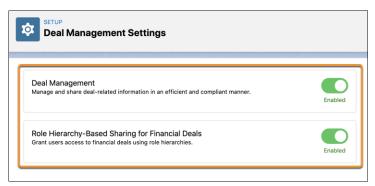
Help deal teams effectively track a financial deal lifecycle with the new Financial Deal Management data model. They can manage every aspect of deal-related interactions and take advantage of compliant, role-based data sharing options.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Deal teams can capture notes, specify the deal stage, the status of the deal, the probability of the deal being successfully closed, and more. They can share deal records that contain confidential information only with relevant stakeholders to maintain compliance. If the Financial Deal object is enabled for Compliant Data Sharing (CDS), then the deal teams can add the Manage Participant component to the deal record page and share records with multiple users or groups at the same time. The component provides a suggested list of

users or groups to add to a record as participants. You can configure the component then select participant types and assign participant roles.

**How:** To enable Financial Deal Management features, from Setup, in the Quick Find box, enter *Deal Management*, and then select **Deal Management Settings**.

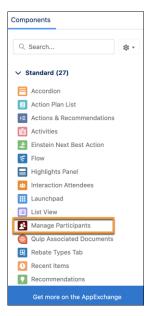


# Share Financial Deals with Multiple Users or Groups

Help deal teams easily share financial deals with multiple participants at a time in a compliant manner. When you add the new Manage Participant component to a financial deal record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Edit a Financial Deal record page. Navigate to the Components menu, and drag the **Manage Participants** component to the record page layout. Ensure that the Financial Deal object is enabled for Complaint Data Sharing.



You can configure the component then select participant types. Users or groups from these types appear as suggestions. To customize the suggestions list, click anywhere on the Manage Participants component to select it. In the properties pane, under Participant Types for Suggestion List, click **Select**. Move the required participant types to the Selected list and click **OK**. You can share financial deal with Account users only.

# Branch Management and Association Engine (Beta)

With automated record linking, the new Association Engine makes work tracking and attribution easier. You can define rules for associating records such as leads and accounts with the branches or other entities that work with them. And reportable branch management objects give you insights on productivity and performance.

#### IN THIS SECTION:

### Track Team Output Your Way with the Association Engine (Beta)

Define your own rules for automatically linking records like leads and accounts with the branches, contacts, users, or other entities that work with them. Record linking happens behind the scenes when rule criteria are met. And it provides a wealth of data about work attribution, productivity, or your custom performance indicators.

### Measure Performance with Branch Management Reportable Objects

Gain insights into productivity and performance by including branch management reportable objects in Lightning Reports.

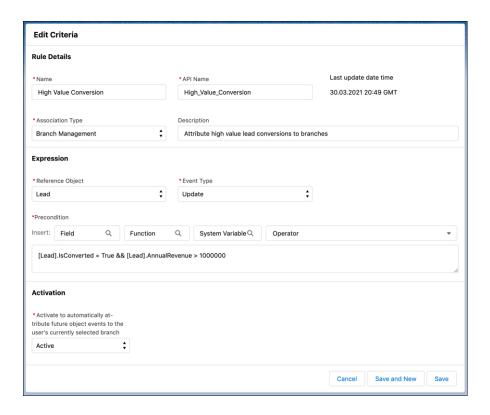
### Track Team Output Your Way with the Association Engine (Beta)

Define your own rules for automatically linking records like leads and accounts with the branches, contacts, users, or other entities that work with them. Record linking happens behind the scenes when rule criteria are met. And it provides a wealth of data about work attribution, productivity, or your custom performance indicators.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** The new Association Engine (beta) extends the automatic record linking capabilities that come with the Branch Management feature. Branch Management lets you automatically attribute new or updated accounts and leads to specific branches. The Association Engine lets you define your own rules for associating new or updated records of any kind with the branches or other entities that work with them.

To define association rule criteria, use the Association Engine Settings page in Setup. Edit an existing rule criteria or click **New Criteria** to create one. The Reference Object and Event Type fields determine which object events, such as the creation of a new record, cause the rule to be evaluated. The Precondition section includes a formula that, when true, causes a new association to be created.



#### SEE ALSO:

Financial Services Cloud Administrator Guide: Association Engine (can be outdated or unavailable during release preview)
Financial Services Cloud Administrator Guide: Branch Management (can be outdated or unavailable during release preview)

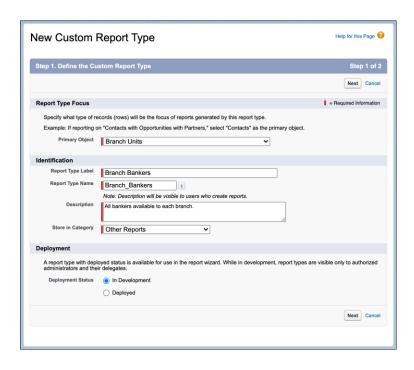
# Measure Performance with Branch Management Reportable Objects

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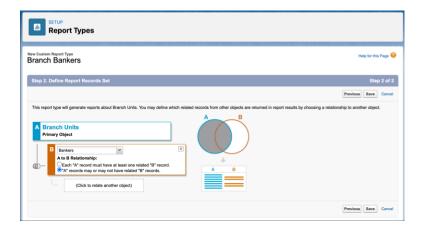
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** All the key branch management objects can now be used in reports. First define a report type that references branch-related objects, and then create reports using that type. The newly reportable objects include Banker, Branch Unit, and Branch Unit Customer, among others.

To create a new branch-related report type, from Setup, type report in the search box, and then select Report Types. Click **New Custom Report Type**. In the Primary Object picklist, select Branch or one of the other branch management objects. Fill in additional information about the report type, then click Next.



If the primary object has related objects that are also reportable, you can relate them on the next page. Save your work.



To use the new report type, select it when creating a report. Then change the filters and outline details to customize your report.

Some branch management objects such as Branch Unit Customer and Branch Unit Related Records don't appear as related objects when Branch Unit is the primary object. To report on those objects, create a report type with Branch Unit Customer or Branch Unit Related Record as the primary object. You can then group the resulting report data by Branch Unit Name if desired.

# Intelligent Document Automation

Manage consent and disclosure documents, generate authorization request forms, and track user responses using the new Intelligent Document Automation features. Consent and disclosure authorizations are important steps in many business processes. Examples of consent documents include annual privacy policies, or disclosure statements about the sharing of financial data.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Start by defining Authorization Form and Data Use Purpose records for business processes that involve user consent or disclosures. You can import form content as text or PDF documents and manage multiple versions of the content per locale.

Generate consent and disclosure forms for users to sign by creating authorization requests. A single authorization request can produce one or more authorization form requests based on legal regulations and the requirements of your business process.

You can track whether the user has seen, signed, or rejected each request, and how and when they gave their response. Optionally capture additional information about the user response, including the user's email address, IP address, or geographic location at the time of consent, for verification and audit purposes.

#### IN THIS SECTION:

### Manage Locale-Specific Consent and Disclosure Document Versions

Manage consent and disclosure versions in Authorization forms. Support regulations and policies that change over time, and present appropriate consent and disclosure information to customers based on their language and location.

### Generate Consent Authorization Requests On Demand

Manage consent and disclosure authorizations from customers alongside the accounts, financial accounts, and other records they pertain to. Generate multiple authorization requests for any data use purpose with the new Intelligent Document Automation features.

#### Gather Consent and Disclosure Authorizations from Customers

Make sure that your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses using Intelligent Document Automation. The process also supports consent on behalf of another person or group.

#### SEE ALSO:

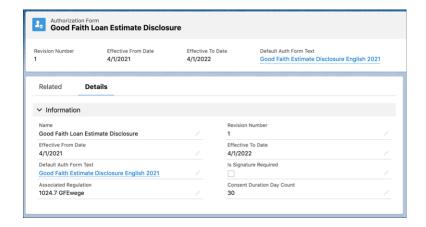
Salesforce Admin Help: Intelligent Document Automation

# Manage Locale-Specific Consent and Disclosure Document Versions

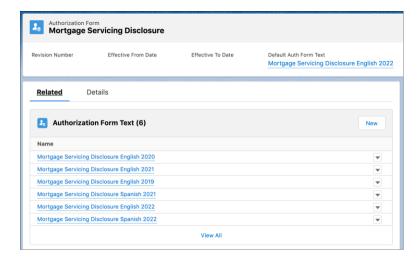
Manage consent and disclosure versions in Authorization forms. Support regulations and policies that change over time, and present appropriate consent and disclosure information to customers based on their language and location.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

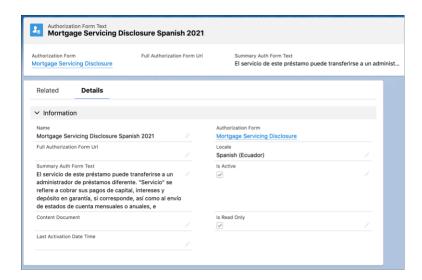
**How:** First create an Authorization Form record that specifies details like the form's effective dates, whether a user signature is required, and the associated regulation the form supports.



Each form specifies a default Authorization Form Text record, which stores or links to the text to be shown to the customer when asking for their consent. Add Authorization Form Text records for each locale and language you want to support.



An Authorization Form Text record can include the full text to be used, or it can link to a URL where the text is located. Only one Authorization Form Text record can be active for a locale at one time.

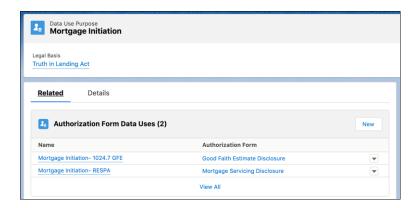


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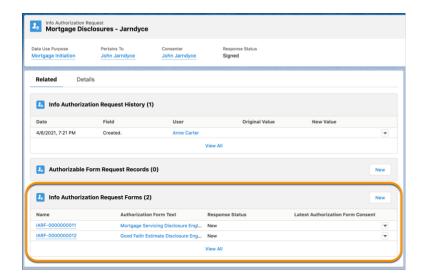
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Start by defining Authorization Form and Data Use Purpose records for business processes that involve user consent or disclosures. You can specify one or more authorization form data uses for each purpose, based on regulations and the requirements of your business process.



Generate consent and disclosure forms for users to sign by creating an authorization request for a specific data use purpose. A single authorization request produces one or more authorization form requests for a customer, based on the data uses.

For example, during a mortgage loan initiation process a loan officer can create a Mortgage Disclosures authorization request. The Mortgage Initiation data use purpose listed two distinct uses, relating to two authorization forms. The request then generates multiple authorization request forms for the borrower to sign, including a Mortgage Servicing Disclosure form and a Good Faith Estimate Disclosure form.

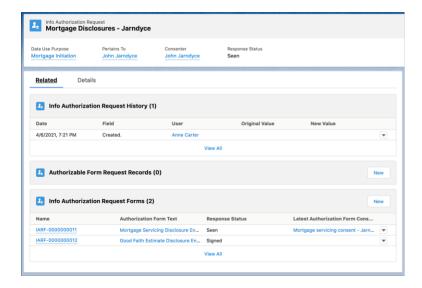


### Gather Consent and Disclosure Authorizations from Customers

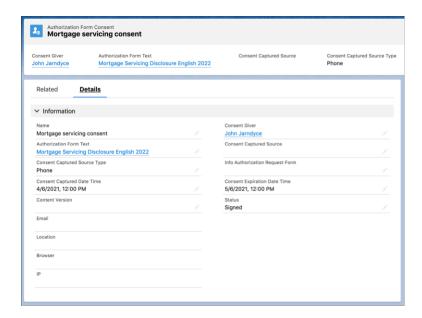
Make sure that your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses using Intelligent Document Automation. The process also supports consent on behalf of another person or group.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** You can track whether the user has seen, signed, or rejected each request, and how and when they gave their response. Optionally, capture additional information about the user response, including the user's email address, IP address, or geographic location at the time of consent, for verification and audit purposes.



To record a user's response to an authorization request, click the **Related** tab on an Info Authorization Request page. Select one of the items in the Info Authorization Request Forms list. You can capture a simple response on that form itself. Or add an Authorization Form Consent record to capture more details about who signed, when they signed, and their location at the time.



Intelligent Document Automation objects are available with Experience Builder licenses, so you can design self-service authorization steps for your customers too.

### Interaction Summaries

The Interaction Summaries component now offers better search capabilities for interaction summary records within the component. With the component now supported on mobile devices, bankers and financial advisors can capture and update interaction summaries on the go.

#### IN THIS SECTION:

#### Find Interaction Summaries Faster with Improved Search

Bankers and financial advisors can quickly find and review past interaction summaries to be better prepared for their next meeting. They can search a record based on the interaction summary title, meeting notes, next steps, or any custom text fields.

### Share Interaction Summaries or Interactions with a Reimagined and Intuitive Interface

Help bankers and financial advisors easily share interactions and interaction summaries with multiple participants at a time in a compliant manner. Previously, they could share records with only one participant at a time. When you add the new Manage Participant component to an interaction or interaction summary record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

#### Access Interaction Summaries on the Go

Bankers and financial advisors can now take advantage of the support for Interaction Summaries component on mobile devices to create, update, or search interaction summaries on the go.

### Find Interaction Summaries Faster with Improved Search

Bankers and financial advisors can quickly find and review past interaction summaries to be better prepared for their next meeting. They can search a record based on the interaction summary title, meeting notes, next steps, or any custom text fields.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

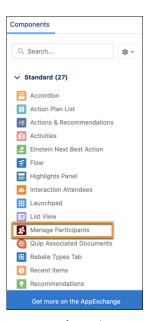
**How:** Add the Interaction Summaries component to the account page so bankers and financial advisors can search for interaction summaries. And now they can use the wildcard character asterisk (\*) in a search query, such as *Joe Sm\**. The component also supports infinite scroll to load interaction summaries.

# Share Interaction Summaries or Interactions with a Reimagined and Intuitive Interface

Help bankers and financial advisors easily share interactions and interaction summaries with multiple participants at a time in a compliant manner. Previously, they could share records with only one participant at a time. When you add the new Manage Participant component to an interaction or interaction summary record page, they can add multiple users or groups as participants to the record, and also assign roles from within the component. The component also provides them a suggested list of users or groups to add to the record.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Edit an Interaction Summary or Interaction record page. Navigate to the Components menu, and drag the **Manage Participants** component to the record page layout. Ensure that the Interaction and Interaction Summary objects are enabled for Complaint Data Sharing.



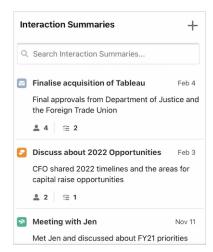
You can configure the component then select participant types. Users or groups from these types appear as suggestions. To customize the suggestions list, click anywhere on the Manage Participants component to select it. In the properties pane, under Participant Types for Suggestion List, click **Select**. Move the required participant types to the Selected list and click **OK**.

#### Access Interaction Summaries on the Go

Bankers and financial advisors can now take advantage of the support for Interaction Summaries component on mobile devices to create, update, or search interaction summaries on the go.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled, and all versions of the Salesforce mobile app.

**How:** Add the Interaction Summaries component to the Home or Account page layout for mobile devices.



### Insurance for Financial Services Cloud

New options on the Policy component give you greater control over the information that appears on the component.

#### IN THIS SECTION:

#### Policy Component Enhancements

Now you can further customize the policy component to show more relevant details.

### Customize Your Analytics for Insurance App Data

Enhancements to the wizard give you more flexibility to customize your app. You can create the app based on Financial Account Transaction data or Insurance Policy Claims data. And you can filter activity data to see tasks and events by date.

## **Policy Component Enhancements**

Now you can further customize the policy component to show more relevant details.

#### IN THIS SECTION:

#### Filter Policies to See Only Inactive Policies

Insurance agents can get quick insights on inactive policies for better client services. The Policy component now shows all inactive policies.

#### Define Custom Link Texts for the List of Policies or Claims Link

Help insurance agents easily navigate to clients' policies and claims. Now you can change the default link texts and craft custom link texts, for example, using localized labels to suit agents' needs.

#### Show Related Records From Multiple Policy-Related Objects

Give insurance agents a comprehensive view of customer policies and claims. Financial Services Cloud enhancements show more detailed information. You can customize the Policy component to add Insurance Policy Assets object as a related list for each policy record. Previously, you could add only Claims object as a related list for policy records. The component displays the related records from these objects on separate tabs.

#### Show Policy-Related Details in an Enhanced Related List

In the Policy component you can now show up to 10 columns, resize and sort your columns, perform mass actions, and wrap text when you select the Enhanced Related List. By default, the Policy component uses the Basic Related List type to show policies' related list

#### Work with Quick Actions on Policy Records

Insurance agents can now accomplish different policy-related tasks without switching tabs. They can invoke standard and custom quick actions on policy records from within the Policy component.

### Filter Policies to See Only Inactive Policies

Insurance agents can get quick insights on inactive policies for better client services. The Policy component now shows all inactive policies.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

How: On the Policy component, at the top of the list, click the filter icon and select **Show only inactive policies**.



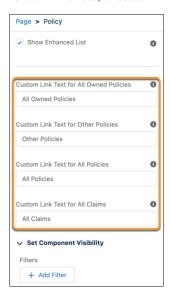
#### Define Custom Link Texts for the List of Policies or Claims Link

Help insurance agents easily navigate to clients' policies and claims. Now you can change the default link texts and craft custom link texts, for example, using localized labels to suit agents' needs.

**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. Depending on the record page and how you configure the component, override the default value of the text fields, Custom Link Text for All Owned Policies, Custom Link Text for Other Policies, Custom Link Text for All Policies, or Custom Link Text for All Claims with text values that suit your needs.



### Show Related Records From Multiple Policy-Related Objects

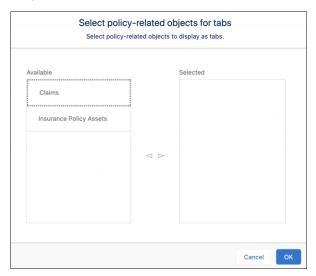
Give insurance agents a comprehensive view of customer policies and claims. Financial Services Cloud enhancements show more detailed information. You can customize the Policy component to add Insurance Policy Assets object as a related list for each policy record. Previously, you could add only Claims object as a related list for policy records. The component displays the related records from these objects on separate tabs.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

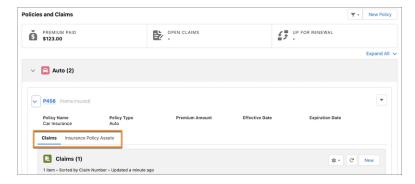
**Who:** Users need the FSC Insurance permission set to use this feature.

**How:** Edit the record page. Click anywhere on the Policy component to select it. In the properties pane, under Select policy-related objects for tabs, click **Select**. Move the required objects to the Selected list, reorder them by dragging them up or down the list, and

click **OK**. The order of the objects determines the order of the tab on the Policy component. You can add only Claims and Insurance Policy Assets as related lists.



Here's what the Policy component looks like with multiple related tabs.



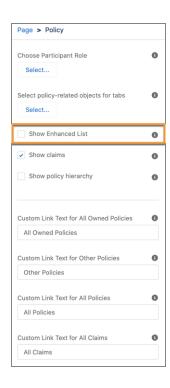
### Show Policy-Related Details in an Enhanced Related List

In the Policy component you can now show up to 10 columns, resize and sort your columns, perform mass actions, and wrap text when you select the Enhanced Related List. By default, the Policy component uses the Basic Related List type to show policies' related list.

**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 or household page. Click anywhere on the Policy component to select it. In the properties pane, select **Show Enhanced List**.



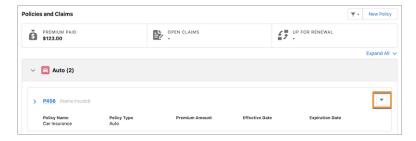
# Work with Quick Actions on Policy Records

Insurance agents can now accomplish different policy-related tasks without switching tabs. They can invoke standard and custom quick actions on policy records from within the Policy component.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the FSC Insurance permission set to use this feature.

**How:** On the Policy component, expand the policy group, and click the icon at the top-right corner of the policy record. Click the required action on the dropdown menu to invoke it.



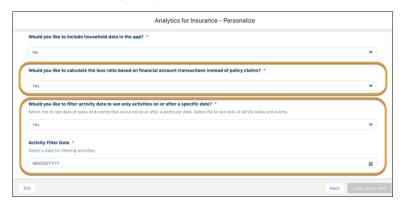
# Customize Your Analytics for Insurance App Data

Enhancements to the wizard give you more flexibility to customize your app. You can create the app based on Financial Account Transaction data or Insurance Policy Claims data. And you can filter activity data to see tasks and events by date.

**Where:** This change applies to Tableau CRM in 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 then follow the instructions in the wizard to create your app.



# Actionable Relationship Center (ARC)

Create account-contact relationships with person accounts, and choose to show or hide related lists in ARC.

#### IN THIS SECTION:

#### Add Members to a Household in ARC

Your users can now add a new or existing person account to a household in ARC. Previously, when they tried to add a member to a household from the Members relationship card, they were able to select or create a contact record only, which resulted in an error. This change enables users to successfully create account-contact relationships.

#### Show or Hide Related Lists in ARC

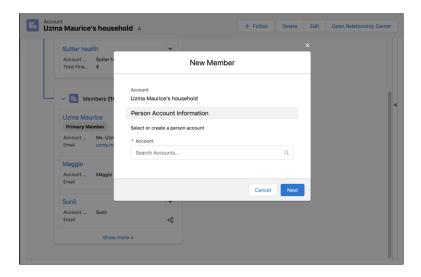
Now related lists are hidden by default to give your users some space. They can use the new Show Related Lists toggle when they want to see group relationships and related list relationships all in one view.

### Add Members to a Household in ARC

Your users can now add a new or existing person account to a household in ARC. Previously, when they tried to add a member to a household from the Members relationship card, they were able to select or create a contact record only, which resulted in an error. This change enables users to successfully create account-contact relationships.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** From the Members relationship card, click **New**. Then create a person account or search for an existing person account.

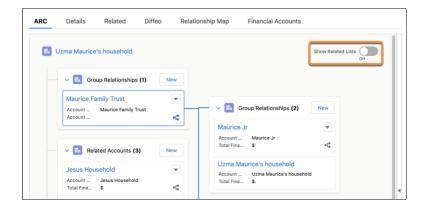


### Show or Hide Related Lists in ARC

Now related lists are hidden by default to give your users some space. They can use the new Show Related Lists toggle when they want to see group relationships and related list relationships all in one view.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Related lists in ARC let users see the big picture, but all of those extra cards can be overwhelming when they're not necessary. Hiding related lists by default gives your users a more streamlined experience, plus faster loading times.



# 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:

#### **Auto-Generate Mappings**

Upload custom forms to the Intelligent Form Reader to automatically extract the custom form fields into a mapping definition. Or, reuse a sample document to populate the fields already extracted when creating another mapping from the same document. Further customize the mapping by appending another custom form, adding fields, or editing the auto-extracted fields.

#### Get Improved Navigation Between Custom Form Pages

The mappings definition page now has options to navigate between the custom forms and form pages. You can use the zoom-in and zoom-out buttons or change the view from thumbnail to list view. The custom form page highlights the extracted fields, which makes it more intuitive and easy to access the fields for mapping.

#### Share Form Fields Across Mappings for Document Type

In the absence of a sample document, you can create mapping definitions that share fields defined for a document type. The Default Fields thumbnail contains the mappings defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

### Save Your Partially Mapped Form Fields

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.

#### SEE ALSO:

#### Einstein Release Notes

Salesforce Admin Help: Intelligent Form Reader

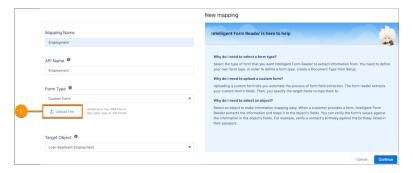
# **Auto-Generate Mappings**

Upload custom forms to the Intelligent Form Reader to automatically extract the custom form fields into a mapping definition. Or, reuse a sample document to populate the fields already extracted when creating another mapping from the same document. Further customize the mapping by appending another custom form, adding fields, or editing the auto-extracted fields.

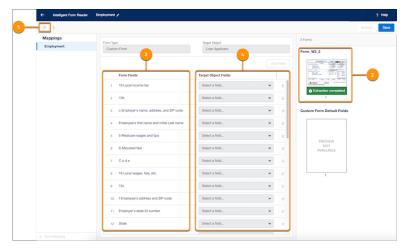
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

Why: Auto-extraction helps improves the accuracy of your data and reduces manual data entry.

**How:** From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Click **New Mapping**, and define the mapping name and a unique API name. In Form Type, select the type of form for which you want to create a mapping. For example, select **custom form** in the dropdown. To let the form reader auto-extract the fields from the custom form, click **Upload File**, and upload the sample form (1). In Target Object, select an object to which you want to map the form fields, then click **Continue**.



In the mapping definition page, the extracted form appears as a thumbnail (2) with the extraction status details. The auto-extracted keys appear in the Form Fields column (3). In the Target Object Fields column, select the fields that you want to map the form fields to (4). Append forms (5), add fields, or edit the auto-extracted fields as required.



After it's saved, you can reuse the mapping when creating a mapping definition using the same sample document.

SEE ALSO:

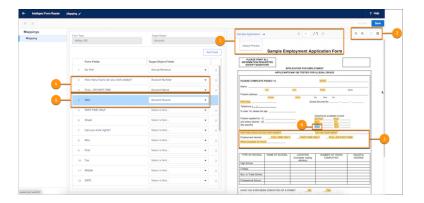
Intelligent Form Reader(can be outdated or unavailable during release preview)

### Get Improved Navigation Between Custom Form Pages

The mappings definition page now has options to navigate between the custom forms and form pages. You can use the zoom-in and zoom-out buttons or change the view from thumbnail to list view. The custom form page highlights the extracted fields, which makes it more intuitive and easy to access the fields for mapping.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or open an existing mapping. Each page in the custom form uploaded appears as thumbnail. To specify or change the mapping for the fields on a page, select a thumbnail to view the full page with the fields populated in the Form Fields column. Use the navigation buttons to move between the custom forms and the pages (1). You can change the view from thumbnail to a list view or use zoom options (2). The fields that are highlighted on the page (3, 4) and in the form field rows (5, 6) help in two-way intuitive navigation for mapping.



#### SEE ALSO:

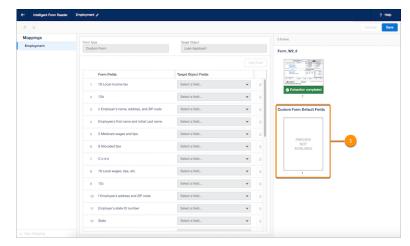
Intelligent Form Reader(can be outdated or unavailable during release preview)

# Share Form Fields Across Mappings for Document Type

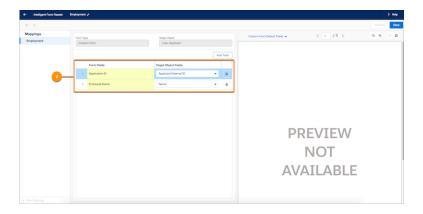
In the absence of a sample document, you can create mapping definitions that share fields defined for a document type. The Default Fields thumbnail contains the mappings defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or open an existing mapping. To populate the Form Fields columns with the fields associated with this document type in general, regardless of specific sample documents, select the document type thumbnail (1).



Edit the required Form Fields, and map them to the Target Object Fields (2) and then save the mapping definition.



SEE ALSO:

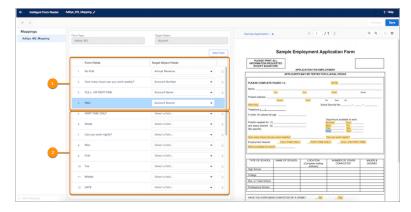
Intelligent Form Reader(can be outdated or unavailable during release preview)

# Save Your Partially Mapped Form Fields

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or edit an existing mapping. In the Form Fields column, all the auto-extracted or added fields appear. Map the required form fields to the Target Object Fields (1), and then save the mapping definition. Any unmapped form fields are also saved for later editing (2).



SEE ALSO:

Intelligent Form Reader(can be outdated or unavailable during release preview)

# Customer 360 Guide for Retail Banking

Introducing the Customer 360 Guide for Retail Banking! Optimize your onboarding and service processes to become the bank your customers love. The assets in this guide help you build a vision and make a plan for digital transformation in the retail banking industry. Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

#### IN THIS SECTION:

#### Explore Retail Banking Business Scenarios

Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

#### Solve Cross-Cloud Solutions with Salesforce Solution Kits

Salesforce solution kits help you implement solutions to complex, cross-cloud use cases. Each solution kit includes recommendations for specific products, configurations, and best practices.

#### SEE ALSO:

Customer 360 Guide for Retail Banking

# Explore Retail Banking Business Scenarios

Business scenarios help you bridge the gap between your organization's business capabilities and the solutions needed to achieve your goals. For each scenario, discover a variety of Salesforce solutions that reduce your time to value and allow you to define a roadmap to build out your organization's functionality.

**How:** Visit the four Business Scenarios for the Customer 360 Guide for Retail Banking:

- Optimize Customer Onboarding
- Enable Operational Compliance
- Elevate Digital Experiences
- Transform Service Engagements

#### Solve Cross-Cloud Solutions with Salesforce Solution Kits

Salesforce solution kits help you implement solutions to complex, cross-cloud use cases. Each solution kit includes recommendations for specific products, configurations, and best practices.

- Deflect Retail Banking Cases Manage a high volume of customer service requests related to retail banking.
- Deliver Seamless Journeys to Financial Services Customers Use Marketing Cloud tools and journeys to acquire, onboard, and engage financial services customers.
- Schedule Banking Appointments Implement scalable processes to let customers schedule appointments to meet locally managed
  or customer-preferred social distancing preferences.

# Other Financial Services Cloud Changes

Do more with other Financial Services Cloud enhancements.

#### IN THIS SECTION:

#### Add Task Dependencies to Action Plans

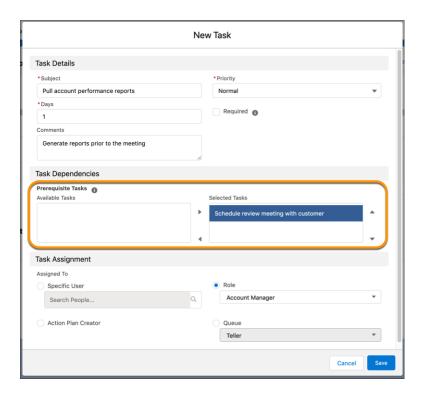
Ensure all the tasks in an action plan are current and actionable by using the new task dependency feature. In the action plan template, define prerequisite tasks that must be done before successor tasks can start. When an action plan is in use, tasks are only generated when their prerequisites are completed.

# Add Task Dependencies to Action Plans

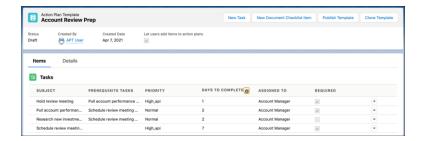
Ensure all the tasks in an action plan are current and actionable by using the new task dependency feature. In the action plan template, define prerequisite tasks that must be done before successor tasks can start. When an action plan is in use, tasks are only generated when their prerequisites are completed.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: When adding a task to an action plan template, select one or more prerequisite tasks from the Available Tasks list.



The Tasks list on the Action Plan Template page displays the prerequisites for each task. The Days to Complete value shows the number of days for that task, and doesn't include the days to complete prerequisites.



Successor tasks are automatically created and added to the action plan task list after all prerequisites are completed.

# New and Changed Objects in Financial Services Cloud

Do more with new and updated Financial Services Cloud objects and fields.

#### **Action Plans**

#### Define finish-to-start dependencies between action plan template items

Use the new Action Plan Template Item Dependency object.

# **Branch Management**

#### Define the criteria for automatically associating records when object events occur

Use the new RelatedRecordAssocCriteria object.

## Compliant Data Sharing

#### View posts and feed-tracked changes on the AccountParticipant object

Use the new AccountParticipantFeed object.

#### View the history of changes to the values in the fields of the AccountParticipant object

Use the new AccountParticipantHistory object.

#### View posts and feed-tracked changes on the OpportunityParticipant object

Use the new OpportunityParticipantFeed object.

#### View the history of changes to the values in the fields of the OpportunityParticipant object

Use the new OpportunityParticipantHistory object.

## **Deal Management**

#### Identify the deal that the financial institution is working on

Use the new FinanciaDeal object.

#### View the user or the group with whom the deal is shared

Use the new FinancialDealParticipant object.

## View the parties, such as partners and competitors, that are involved in the deal

Use the new FinancialDealParty object.

## Identify the products (services) offered by the bank in the deal

Use the new FinancialDealProduct object.

#### Insurance

#### Get search results for the InsurancePolicyAsset object

The InsurancePolicyAsset object is now searchable.

## Intelligent Document Automation

#### Identify a record whose disclosure should be authorized

Use the new AuthFormRequestRecord object.

#### Manage a form to be presented to someone for their consent

Use the new AuthorizationForm object.

#### Capture someone's consent to a specific form

Use the new AuthorizationFormConsent object.

## Specify the forms that should be presented for a data use purpose

Use the new AuthorizationFormDataUse object.

#### Manage text versions for a form based on time period and locale

Use the new AuthorizationFormText object.

#### Define the regulations that govern a data use

Use the new DataUseLegalBasis object.

## Specify the valid reasons for disclosing sensitive data

Use the new DataUsePurpose object.

#### Ask someone to consent to one or more forms for a data use purpose

Use the new InfoAuthorizationRequest object.

#### Present a specific authorization form to someone for their consent

Use the new InfoAuthRequestForm object.

# Intelligent Form Reader

#### Define fields for a page in the sample document

Use the new OcrSampleDocumentPage object to define a page in the OCR sample document.

#### Fields added in the OcrSampleDocument object

- Use the ContentAssetId field to identify the associated content asset.
- Use the NamespacePrefix field to assign a namespace prefix to a managed package.

#### Fields added in the OcrSampleDocumentField object

- Use the FieldLabelMaxX field to indicate the right edge of the bounding box of the field.
- Use the FieldLabelMaxY field to indicate the bottom edge of the bounding box of the field.
- Use the FieldLabelMinX field to indicate the left edge of the bounding box of the field.
- Use the FieldLabelMinY field to indicate the top edge of the bounding box of the field.
- Use the OcrSampleDocumentPageId field to identify the associated OCR sample document page.

#### Fields added in the OcrTemplate object

Use the NamespacePrefix field to assign a namespace prefix to a managed package.

#### Interaction Summary

#### View the user or the group with whom the interaction is shared

Use the new InteractionParticipant object.

# New Fields on Interaction

#### View the unique reference ID of the interaction

Use the new Reference Identifier field.

#### Store the interaction description

Use the new Description field.

#### New Fields on InteractionAttendee

#### Indicate whether the attendee is the interaction organizer

Use the new IsOrganizer field.

#### View the response of the attendee to the interaction

Use the new AttendeeResponse field.

#### View the email address of the attendee

Use the new EmailAddress field.

# New Field on InsurancePolicyAsset

#### Indicate whether the insurance policy asset is active

Use the new IsActive field.

# **REST API**

Financial Services Cloud REST API includes enhanced calls.

# Mortgage

## External ID No Longer Required to Create or Update Mortgage Loan Applications

It's now possible to Create or Upsert a mortgage loan application without including externalId in a POST or PATCH request. The externalId field can still be used as a key value, but it's not required. There are no changes to the API endpoints. The change applies to v52.0 and later.

# Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

**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.

**When:** This also applies to the Spring '21 release. We'll let you know when Data Processing Engine is available in Government Cloud and Government Cloud Plus.

# **Health Cloud**

Introducing Intelligent Appointment Management, which automatically recommends the best appointment options so contact center and scheduling staff can increase first-call resolution and reduce no-shows. And get performance and usability enhancements to our robust provider search functionality.

### IN THIS SECTION:

#### Intelligent Appointment Management

Now call center agents and departmental schedulers can use Health Cloud to quickly book the right appointments in a flexible, intuitive, and intelligent console scheduling experience. Behind the scenes, you can centralize interactions with multiple scheduling systems in a single interface.

#### Provider Network Management Add-On for Health Cloud

Transform provider network management and self-service to support greater efficiencies, compliance, and growth. Provider Network Management is a new add-on product that helps improve the provider experience, raise provider satisfaction rates, and maximize patient outcomes.

#### **Provider Search Enhancements**

Refresh your provider data on demand, specify required fields, and set up dependent field values.

#### **Upsert Provider Records**

A new API enables you to upsert data in Health Cloud to represent a practitioner and all all the objects and fields in the Provider data model relevant to a Practitioner, such as NPI, provider specialty, and provider taxonomy.

#### Start Your Journey with the Health Cloud Provider Call Center Learning Map

Follow the path to success with the Health Cloud Provider Call Center learning map. The learning map guides you through planning and setting up a Health Cloud provider call center with targeted resources for every step of your journey. Check out help topics, white papers, and Trailhead modules in one place and get your call center up and running in no time!

#### FHIR R4 Support Enhancements

Health Cloud is now more compatible with Fast Healthcare Interoperability Resources (FHIR) R4. Health Cloud adds support for two more FHIR resources and two more FHIR data types. And some objects developed in Spring '21 are enhanced to align more closely with FHIR R4 specifications.

#### **Utilization Management**

Utilization management allows payers to streamline administrative processes to expedite treatment evaluation. This quick review process helps patients get the best line of treatment, and helps to reduce healthcare costs.

#### Intelligent Document Automation

We've added functionality to Intelligent Document Automation so you can manage consent and disclosure documents, generate authorization request forms, and track user responses.

#### Intelligent Form Reader

We've added functionality to Intelligent Form Reader so you can get more value from scanned files.

#### Enable Site User Access for Health Cloud

Site users can now use Health Cloud features and objects with the new Health Cloud for Experience Cloud Sites permission set license and its feature-specific permission sets.

#### **Optimize Person Accounts**

We've added a new setting that enables you to improve performance for your users by skipping some database queries.

#### New and Changed Objects in Health Cloud

Access more data through these new and changed Health Cloud objects.

#### Connect REST API

Health Cloud REST API includes enhanced calls.

#### Apex: New Items

Health Cloud has these new classes, interface, and enums.

# Intelligent Appointment Management

Now call center agents and departmental schedulers can use Health Cloud to quickly book the right appointments in a flexible, intuitive, and intelligent console scheduling experience. Behind the scenes, you can centralize interactions with multiple scheduling systems in a single interface.

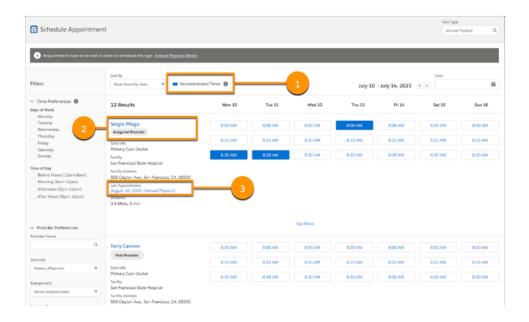
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses. The attendance likelihood prediction features require the Einstein Analytics Prediction add-on license and at least one Tableau CRM for Healthcare license (for administration).

Why: Health Cloud now delivers on a more complete patient journey by helping you manage that central touchpoint: appointments.

- **Schedulers:** With a more efficient workflow, call center agents and schedulers can spend less time swiveling between different back-end scheduling systems, faxes, email threads, and phone calls.
- **Patients:** Now that you can synchronize time slots and appointment records between Health Cloud and an electronic health records system in real time, you can offer higher patient satisfaction: less waiting, more efficient booking calls, and faster connection to the right provider.
- **Providers:** Appointment scheduling in Health Cloud helps reduce costly no-shows, and you can tie the appointment process directly to other engagement touch points, such as program enrollment or remote device monitoring, for a unified, coherent patient care experience.

**How:** Working as the user interface to your scheduling systems, Intelligent Appointment Management leverages Health Cloud's enhanced provider search capabilities to find exactly the right provider from what can be thousands of possibilities. Connect seamlessly to your scheduling systems via our FHIR-aligned APIs using middleware such as MuleSoft, or drive all activity right from Salesforce Scheduler.



With the optional Einstein Analytics Prediction add-on license, you can highlight the times when the patient is most likely to attend, based on the historical attendance rates of similar patients (1). This helps call center agents book appointments that the patient is more likely to show up for.

Users can see assigned providers, such as the primary care provider, at the top of the list, so scheduling is quicker than ever (2). Right below that, they can see providers who have seen the patient in the last year.

An external scheduling system can notify Health Cloud of appointments and updates to keep agent and scheduler information up to date, so the agent or scheduler always has the most up-to-date view for their patient in Health Cloud (3).

You can customize the search filters to help users find providers. Specify your own required fields, or set up dependent picklists.

# Provider Network Management Add-On for Health Cloud

Transform provider network management and self-service to support greater efficiencies, compliance, and growth. Provider Network Management is a new add-on product that helps improve the provider experience, raise provider satisfaction rates, and maximize patient outcomes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud, Health Cloud Platform, and Provider Network Management permission set licenses. For pricing and packaging details, see PNM Pricing.

#### Why:

- Streamline the enrollment and credentialing process within a centralized platform to reduce provider turnaround time during onboarding.
- Strengthen provider relationships by enabling deeper collaboration and engagement to manage, grow, and optimize the provider network.
- Optimize the credentialing process to ensure quality patient care by accredited providers.

#### How:

- For provider recruiting teams, PNM supports targeted campaigns, provider outreach, and processing provider leads, plus the intake provider application.
- For provider credentialing teams, PNM provides the intake credentialing application and credentialing verification.

The Provider Network Management add-on also includes OmniStudio, Document Generation, and Content (formerly Express).

For more information about the Vlocity Health and Insurance credentialing features, see the Velocity documentation.



**Note**: The Provider Recruiting and Credentialing features of the Vlocity Health and Insurance package are fully supported in Health Cloud. You will need the Vlocity Health and Insurance package for OmniStudio.

#### IN THIS SECTION:

#### Integrate Providers into Your Network with the New Health Cloud Data Model

The Health Cloud data model now supports provider application and credentialing so payers can easily enroll providers into their networks. The enhanced data model includes new objects that payer organizations can use to integrate providers into their network. Providers can apply to join a payer's network, and credentialing specialists can review and verify the information for approval.

# Integrate Providers into Your Network with the New Health Cloud Data Model

The Health Cloud data model now supports provider application and credentialing so payers can easily enroll providers into their networks. The enhanced data model includes new objects that payer organizations can use to integrate providers into their network. Providers can apply to join a payer's network, and credentialing specialists can review and verify the information for approval.

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 and the Health Cloud Provider Network Management add-on license.

#### SEE ALSO:

Health Cloud Developer Guide: Provider Network Management Administrator Guide: Provider Relationship Management

# **Provider Search Enhancements**

Refresh your provider data on demand, specify required fields, and set up dependent field values.



**Note**: The Provider Recruiting and Credentialing features of the Vlocity Health and Insurance package are fully supported in Health Cloud. You will need the Vlocity Health and Insurance package for OmniStudio.

#### IN THIS SECTION:

#### Update Searchable Fields on Demand

Health Cloud provider fields are updated every six hours, but don't wait to test your updates. Set up Provider Search in a sandbox, refresh your text and data, then move those settings to production.

#### Specify Required Provider Search Fields

Customize your Provider Search form. Add the fields that you want to the required Provider Name, Facility Name, and Specialty fields.

#### Copy Provider Search Results to Address Member Queries Faster

Your users can now copy provider details from search results to clipboards with the click of an icon. They can respond to provider queries faster with fewer clicks and keystrokes.

#### Streamline Selection With Dependent Picklist

Give your users better, faster results with dependent picklists that eliminate invalid options from consideration. For example, when a user selects Wisconsin in the State field, the Provider field shows only providers that operate in Wisconsin.

#### Use Multi-Select Picklists to Get Better Provider Search Results

Searches based on multiple selections give your users more comprehensive results. With a multi-select picklist, search results return exact and partial matches to your users. You can now configure Provider Search to run searches based on your custom multi-select picklists. Previously you could use only text fields and single-select picklists.

#### Help Users Find Providers Faster

Call center operators can find the right information for patients faster with type-ahead fields.

## Update Searchable Fields on Demand

Health Cloud provider fields are updated every six hours, but don't wait to test your updates. Set up Provider Search in a sandbox, refresh your text and data, then move those settings to production.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

SEE ALSO:

Admin Guide: Set Up Provider Search

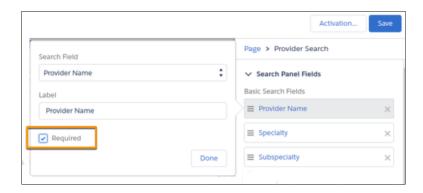
# Specify Required Provider Search Fields

Customize your Provider Search form. Add the fields that you want to the required Provider Name, Facility Name, and Specialty fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** In the app builder, edit the Provider Search component. Under Search Panel Fields, click a field and check or uncheck the **Required** option.



# Copy Provider Search Results to Address Member Queries Faster

Your users can now copy provider details from search results to clipboards with the click of an icon. They can respond to provider queries faster with fewer clicks and keystrokes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** To enable the Copy icon in Provider Search results, you must first configure the Provider Search component on your page. Open the page with the Provider Search component in the Lightning App Builder and select the **Show action bar** checkbox.

# Streamline Selection With Dependent Picklist

Give your users better, faster results with dependent picklists that eliminate invalid options from consideration. For example, when a user selects Wisconsin in the State field, the Provider field shows only providers that operate in Wisconsin.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** In the Object Manager, select an object and go to its Fields and Relationships section. Click **Field Dependencies** to specify the hierarchy of field values that fits your purpose.



**1** 

Note: A controlling field can have up to 300 dependent fields, but a dependent field can only have one controlling field.

#### Use Multi-Select Picklists to Get Better Provider Search Results

Searches based on multiple selections give your users more comprehensive results. With a multi-select picklist, search results return exact and partial matches to your users. You can now configure Provider Search to run searches based on your custom multi-select picklists. Previously you could use only text fields and single-select picklists.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** From Setup, in the Quick Find box, enter *Care Provider Search Config*, and select **Care Provider Search Config**. Then create a search configuration to map a custom multi-select picklist from the Healthcare Provider or Healthcare Practitioner Facility objects to a custom text field in the Care Provider Searchable Fields object.

SEE ALSO:

Custom Fields in Provider Search

# Help Users Find Providers Faster

Call center operators can find the right information for patients faster with type-ahead fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How**: Users shouldn't have to click Search to see their filtered results. Now, when a user types at least three letters in a text or picklist field, matching records begin to appear immediately. For example, typing "anu" in Provider Name pops up providers with the first name Anu, as well as Anupama, Anushri, and more. If the right match doesn't appear, more detailed results are a click away.



**Note**: The "View Advanced Search" link now appears only when the admin has specified advanced fields. When there are no advanced fields, users don't see the link.

# **Upsert Provider Records**

A new API enables you to upsert data in Health Cloud to represent a practitioner and all all the objects and fields in the Provider data model relevant to a Practitioner, such as NPI, provider specialty, and provider taxonomy.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

When: This change is available in the Salesforce API starting with version 52.0.

**Why**: Upsert means updating data in healthcare provider record fields and inserting new fields with a single call. For example, you may want to update the operating hours of an existing provider account at the same time as you specify the provider type.

# Start Your Journey with the Health Cloud Provider Call Center Learning Map

Follow the path to success with the Health Cloud Provider Call Center learning map. The learning map guides you through planning and setting up a Health Cloud provider call center with targeted resources for every step of your journey. Check out help topics, white papers, and Trailhead modules in one place and get your call center up and running in no time!



**How:** Click each stop on the trail to see a page of content to support that stage of the journey. We've scoured our educational resources and pulled together the best content to answer your questions and get you going in the right direction.

#### SEE ALSO:

Health Cloud Provider Call Center Learning Map

# FHIR R4 Support Enhancements

Health Cloud is now more compatible with Fast Healthcare Interoperability Resources (FHIR) R4. Health Cloud adds support for two more FHIR resources and two more FHIR data types. And some objects developed in Spring '21 are enhanced to align more closely with FHIR R4 specifications.

# **(1)**

#### Important:

- Starting with the Summer '22 release, new customers can't 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 is to be built on the FHIR R4-aligned data model. The packaged objects in the EHR
  data model aren't going to be used for future development.

#### IN THIS SECTION:

#### Store More Types of Clinical Data in Health Cloud

Health Cloud now supports the FHIR resources Document Reference and Device and the FHIR data types Timing and Annotation. By adding support for these resources and data types, Health Cloud and its Clinical data model are now better equipped to store more types of healthcare information.

## Get Enhanced Alignment with FHIR Resources

Health Cloud is now more closely aligned with FHIR resources that were supported from the Spring '21 release. The enhancements include new child objects and new fields for existing objects.

#### Run Reports on the FHIR R4-Aligned Data Model

Build reports to get a comprehensive view of the health records in the FHIR R4-aligned data model.

#### Enable Site User Access for Objects in the Clinical Data Model

Objects in the Clinical data model can now be accessed by site users if they have the appropriate permission set license and the FHIR R4 for Experience Cloud Sites permission set.

# Store More Types of Clinical Data in Health Cloud

Health Cloud now supports the FHIR resources Document Reference and Device and the FHIR data types Timing and Annotation. By adding support for these resources and data types, Health Cloud and its Clinical data model are now better equipped to store more types of healthcare information.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** Document Reference is supported using enhancements to the Diagnostic Summary object and the new Diagnostic Summary Detail child object. Device is supported using the Asset object and enhancements in the Care Registered Device object. Timing and Annotation are supported using the new Activity Timing and Author Note objects.

# Get Enhanced Alignment with FHIR Resources

Health Cloud is now more closely aligned with FHIR resources that were supported from the Spring '21 release. The enhancements include new child objects and new fields for existing objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

#### Why:

- The Medication object gets a new child object (Medicinal Ingredient) to store ingredient-related information. You can also store batch numbers and expiration dates in medication records using new fields.
- The Health Condition object gets a new child object (Health Condition Detail) to support zero-to-many values for body site and laterality.
- The Account object has Source System ID and Source System Modified fields to support source system information for person account and organization records.
- Code Set Bundle records can be grouped by their types using the new Type field.
- The Care Observation object gets a new field Derivation Source to specify records that are used to derive observation values.
- Patient Immunization records can reference organization records that represent their manufacturers using the Manufacturer Account field.
- Various objects now have references to the Care Registered Device and Diagnostic Summary objects to support device and document reference values.

# Run Reports on the FHIR R4-Aligned Data Model

Build reports to get a comprehensive view of the health records in the FHIR R4-aligned data model.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

When: This change is available from the first week of March 2021, in the Spring '21 release.

# Enable Site User Access for Objects in the Clinical Data Model

Objects in the Clinical data model can now be accessed by site users if they have the appropriate permission set license and the FHIR R4 for Experience Cloud Sites permission set.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

When: You can use this permission set from July 15, 2021.

Who: This permission set is available to users who are assigned the Health Cloud for Experience Cloud Sites permission set license.

**How:** To enable site user access to these objects, assign site users the Health Cloud for Experience Cloud Sites permission set license and the FHIR R4 for Experience Cloud Sites permission set.

# **Utilization Management**

Utilization management allows payers to streamline administrative processes to expedite treatment evaluation. This quick review process helps patients get the best line of treatment, and helps to reduce healthcare costs.

#### IN THIS SECTION:

#### Streamline Utilization Management for Better Patient Care

The improved Health Cloud utilization management data model drives operational efficiency for care request authorization. The data model helps providers and payers give more information in care requests. And it decreases authorization cycle time, improves approvals, and gives faster access to care for members.

#### Capture Accurate Information Using FHIR R4-Aligned Fields

The Health Cloud Utilization Management data model now includes FHIR R4-aligned fields that allow you to capture coded clinical information. While we have retained the existing fields that look up to HealthCareProcedure and HealthCareDiagnosis entities, we strongly recommend that you use the new fields that look up to CodeSets and CodeSetBundles.

#### Give Experience Cloud Users Access to Utilization Management Objects

You can now give your Experience Cloud users create, read, write, or delete permissions for utilization management data objects.

# Streamline Utilization Management for Better Patient Care

The improved Health Cloud utilization management data model drives operational efficiency for care request authorization. The data model helps providers and payers give more information in care requests. And it decreases authorization cycle time, improves approvals, and gives faster access to care for members.

**Where:** The utilization management user interface is available only in Lightning Experience. You can set up and configure utilization management in either Lightning Experience or Salesforce Classic. This feature is available in orgs where Health Cloud is enabled.

**Who:** Users must have Health Cloud and the Health Cloud Platform permission set license assigned to them. Also, users need these permission sets: Health Cloud Permission Set License and Health Cloud Utilization Management.

**Why:** When providers submit preauthorization requests to payers, they can create diagnosis, drug requests, and service request records and associate them with the request. Reviewers such as UM clinicians and registered nurses at payer organizations can then review, evaluate, and escalate requests as needed. Medical directors can approve or deny requests and give the reason for the determination. Payers, providers, and members can view and track the status of their requests. This level of transparency improves customer experience and member trust.

# Capture Accurate Information Using FHIR R4-Aligned Fields

The Health Cloud Utilization Management data model now includes FHIR R4-aligned fields that allow you to capture coded clinical information. While we have retained the existing fields that look up to HealthCareProcedure and HealthCareDiagnosis entities, we strongly recommend that you use the new fields that look up to CodeSets and CodeSetBundles.

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**Who:** Health Cloud users must have Health Cloud and the Health Cloud Platform permission set license assigned to them. Also, users need these permission sets: Health Cloud Permission Set License and Health Cloud Utilization Management. External users must have one of the standard external profiles: Customer Community, Customer Community Plus, Partner Community, and External Apps.

# Intelligent Document Automation

We've added functionality to Intelligent Document Automation so you can manage consent and disclosure documents, generate authorization request forms, and track user responses.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Consent and disclosure authorizations are important steps in many business processes. Examples of consent documents include annual privacy policies, or disclosure statements about the sharing of financial data.

**How:** Start by defining Authorization Form and Data Use Purpose records for business processes that involve user consent or disclosures. You can import form content as text or PDF documents, and manage multiple versions of the content per locale.

Generate consent and disclosure forms for users to sign by creating authorization requests. A single authorization request can produce one or more authorization form requests, based on legal regulations and the requirements of your business process.

You can track whether the user has seen, signed, or rejected each request, and how and when they gave their response. Optionally capture additional information about the user response, including the user's email address, IP address, or geographic location at the time of consent, for verification and audit purposes.

#### IN THIS SECTION:

#### Manage Locale-Specific Consent and Disclosure Document Versions

Manage different versions of consent and disclosure form text based on locale and time period.

### Generate Consent Authorization Requests On Demand

Manage consent and disclosure authorizations from customers alongside the accounts, financial accounts, and other records they pertain to. Generate multiple authorization requests for any data use purpose with the new Intelligent Document Automation features.

## Gather Consent and Disclosure Authorizations from Customers

Make sure your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses using Intelligent Document Automation. The process also supports someone consenting on behalf of another person or group.

#### SEE ALSO:

Salesforce Admin Help: Intelligent Document Automation

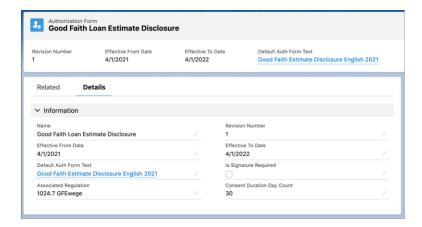
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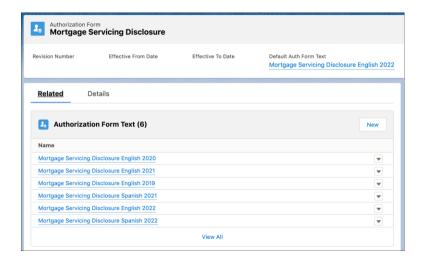
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Support regulations and policies that change over time, and present appropriate consent and disclosure information to customers based on their language and location.

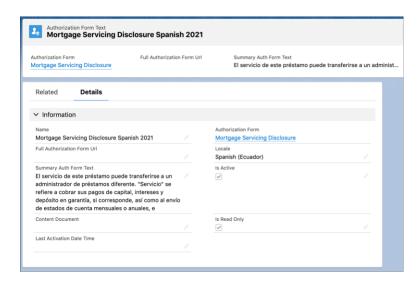
**How:** First create an Authorization Form record that specifies details like the form's effective dates, whether a user signature is required, and the associated regulation the form supports.



Each form specifies a default Authorization Form Text record, which stores or links to the text to be shown to the customer when asking for their consent. Add additional Authorization Form Text records for each locale and language you want to support.



An Authorization Form Text record can include the full text to be used, or it can link to a URL where the text is located. Only one Authorization Form Text record can be active for a locale at one time.



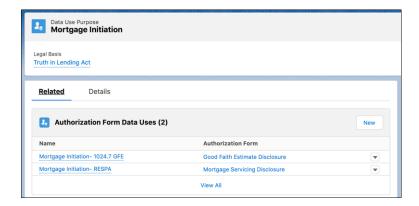
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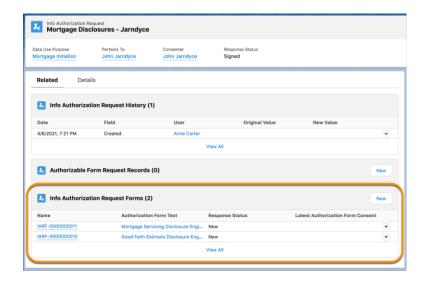
Why: Integrate consent authorization steps into your business processes to encourage compliance with privacy regulations and policies.

**How:** Start by defining Authorization Form and Data Use Purpose records for business processes that involve user consent or disclosures. You can specify one or more authorization form data uses for each purpose, based on regulations and the requirements of your business process.



Generate consent and disclosure forms for users to sign by creating an authorization request for a specific data use purpose. A single authorization request produces one or more authorization form requests for a customer, based on the data uses.

For example, during a mortgage loan initiation process a loan officer can create a Mortgage Disclosures authorization request. The Mortgage Initiation data use purpose listed two distinct uses, relating to two authorization forms. The request then generates multiple authorization request forms for the borrower to sign, including a Mortgage Servicing Disclosure form and a Good Faith Estimate Disclosure form.



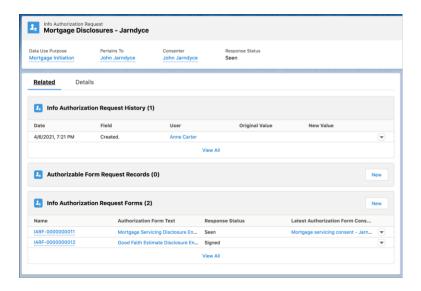
### Gather Consent and Disclosure Authorizations from Customers

Make sure your customers agree to information disclosure policies before capturing or sharing sensitive data. Monitor consent and disclosure authorization requests provided to users, and track their responses using Intelligent Document Automation. The process also supports someone consenting on behalf of another person or group.

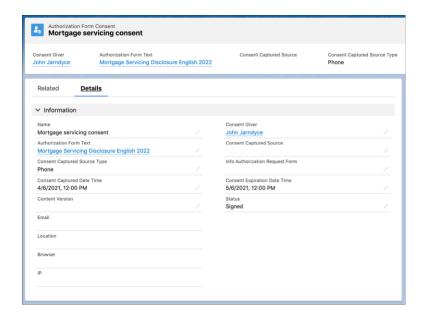
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Encourage compliance with privacy regulations by embedding consent and disclosure authorizations into your current business processes.

**How:** You can track whether the user has seen, signed, or rejected each request, and how and when they gave their response. Optionally capture additional information about the user response, including the user's email address, IP address, or geographic location at the time of consent, for verification and audit purposes.



To record a user's response to an authorization request, click the **Related** tab on an Info Authorization Request page. Select one of the items in the Info Authorization Request Forms list. You can capture a simple response on that form itself. Or add an Authorization Form Consent record to capture more details about who signed, when they signed, and their location at the time.



Intelligent Document Automation objects are available with Experience Builder licenses, so you can design self-service authorization steps for your customers too.

# Intelligent Form Reader

We've added functionality to Intelligent Form Reader so you can get more value from scanned files.

#### IN THIS SECTION:

#### **Auto-Generate Mappings**

Upload custom forms to have Intelligent Form Reader automatically extract their custom fields into a mapping definition. Alternatively, reuse a sample document to populate the fields already extracted when creating another mapping from the same document. Auto-extraction of form fields improves the accuracy of your data and reduces your manual workload. Further customize the mapping by appending another custom form, adding fields, or editing the auto-extracted fields.

#### Improved Navigation Between Custom Form Pages

The mappings definition page now has options to navigate between the custom forms and form pages. You can use the zoom-in and zoom-out buttons or change the view from thumbnail to list view. The custom form page highlights the extracted fields, which makes it easier and more intuitive to access those fields for mapping.

#### Share Form Fields Across Mappings for Document Type

In the absence of a sample document, you can create mapping definitions that share fields defined for a document type. The Default Fields thumbnail contains the mappings defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

#### Save a Draft of Your Mappings

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save it as a draft along with any unmapped form fields.

SEE ALSO:

Salesforce Admin Help: Intelligent Form Reader

# **Auto-Generate Mappings**

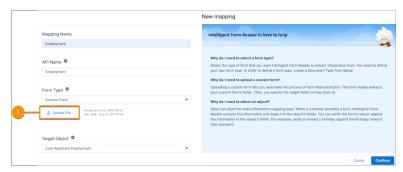
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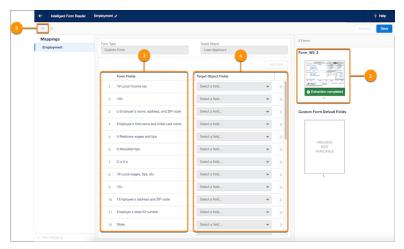
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**Why:** Auto-extraction of form fields helps improve the accuracy and efficiency of capturing the correct data and reduces the manual effort of entering the fields in a mapping definition.

**How:** From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Click **New Mapping**, and define the mapping name and a unique API name. In Form Type, select the type of form for which you want to create a mapping. For example, select **custom form** in the dropdown. To let the form reader auto-extract the fields from the custom form, click **Upload File**, and upload the sample form (1). In Target Object, select an object to which you want to map the form fields, then click **Continue**.



In the mapping definition page, the extracted form appears as a thumbnail (2) with the extraction status details. The auto-extracted keys appear in the Form Fields column (3). In the Target Object Fields column, select the fields that you want to map the form fields to (4). Append forms (5), add fields, or edit the auto-extracted fields, as required.



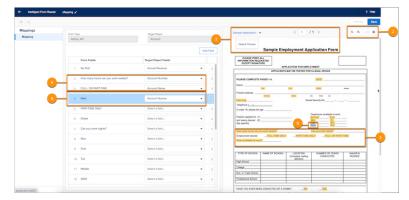
After it's saved, you can reuse the mapping when creating a mapping definition using the same sample document.

# Improved Navigation Between Custom Form Pages

The mappings definition page now has options to navigate between the custom forms and form pages. You can use the zoom-in and zoom-out buttons or change the view from thumbnail to list view. The custom form page highlights the extracted fields, which makes it easier and more intuitive to access those fields for mapping.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or open an existing mapping. Each page in the custom form uploaded appears as thumbnails. To specify or change the mapping for the fields on a page, select a thumbnail to view the full page with the fields populated in the Form Fields column. Use the navigation buttons to move between the custom forms and the pages (1). You can change the view from thumbnail to a list view or use zoom options (2). The fields that are highlighted on the page (3, 4) and in the form field rows (5, 6) help in two-way intuitive navigation for mapping.

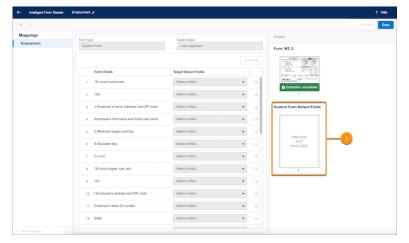


# Share Form Fields Across Mappings for Document Type

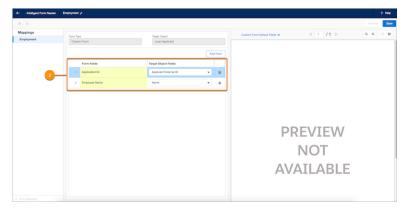
In the absence of a sample document, you can create mapping definitions that share fields defined for a document type. The Default Fields thumbnail contains the mappings defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or open an existing mapping. To populate the Form Fields columns with the fields associated with this document type in general, regardless of specific sample documents, select the document type thumbnail (1).



Edit the required Form Fields, and map them to the Target Object Fields (2) and then save the mapping definition.

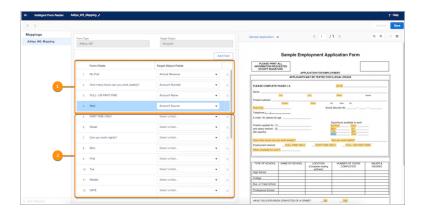


# Save a Draft of Your Mappings

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save it as a draft along with any unmapped form fields.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where AWSTextract1000LimitAddOn is enabled. This feature is available for use in multiple clouds.

**How:** Create a mapping or edit an existing mapping. In the Form Fields column, all the auto-extracted or added fields appear. Map the required form fields to the Target Object Fields (1), and then save the mapping definition. Any unmapped form fields are also saved for later editing (2).



# **Enable Site User Access for Health Cloud**

Site users can now use Health Cloud features and objects with the new Health Cloud for Experience Cloud Sites permission set license and its feature-specific permission sets.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

When: You can use this permission set license and its permission sets from July 15, 2021.

**Who:** The Health Cloud for Experience Cloud Sites permission set license is available in orgs that have Customer Community for Health Cloud, Customer Community Plus for Health Cloud, or External Apps for Health Cloud.

**How:** To enable a site user to access objects and features in Health Cloud, first assign this permission set license to the site user. After assigning the permission set license, assign the feature-specific permission sets to the user as required.

# **Optimize Person Accounts**

We've added a new setting that enables you to improve performance for your users by skipping some database gueries.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**Why:** Primary Contact is a custom field used in the individual model to connect an account and a contact record. The person account model uses the Person Contact field. If your org started out using the individual data model to represent people, some UI components and all triggers related to the concept of a patient—such as account, contact, opportunity, and lead triggers—still reference Primary Contact. Removing these dependencies can improve performance for your users.

**How**: Just select the new Disable Primary Contact ID option in the Custom Settings section of Setup.

# New and Changed Objects in Health Cloud

Access more data through these new and changed Health Cloud objects.

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

# Intelligent Appointment Management

#### Set up Intelligent Appointment Scheduling

Use the new ApptBookingConfig object.

#### Define endpoints for connecting to external scheduling systems

Use the new ApptBookingUrlConfig object.

#### Record healthcare delivery activities

Use the new ClinicalEncounter object.

#### Link a specific health care practitioner with a specific facility

Use the new HealthcarePractitionerFacility object.

#### Link a type of health care service with a care specialty

Use the new WorkTypeCareSpecialty object.

#### Link a type of health care service with a code

Use the new WorkTypeCodeSetBundle object.

# FHIR R4-Aligned Data Model

#### Specify timing information for activities repeated in regular cycles

Use the new ActivityTiming object.

#### Add notes and their author information to different records

Use the new AuthorNote object.

#### Store device information from FHIR systems in Health Cloud

Use the new and existing fields in the CareRegisteredDevice and Asset objects.

#### Store document reference information from FHIR systems in Health Cloud

Use the new and existing fields in the DiagnosticSummary object.

#### Add more document reference details to a DiagnosticSummary record

Use the new DiagnosticSummaryDetail object.

# Add more site and laterality details to a HealthCondition record

Use the new HealthConditionDetail object.

#### Add ingredient information to a Medication record

Use the new MedicinalIngredient object.

#### Specify batch and expiration information for medications

Use the new BatchNumber and ExpirationDateTime fields in the Medication object.

## Specify types for code set bundles

Use the new Type picklist in the CodeSetBundle object.

#### Specify account information for a vaccine's manufacturer in PatientImmunization records

Use the new ManufacturerAccountId field in the PatientImmunization object.

#### Specify information about an observation's derivation source

Use the new DerivationSourceId field in the CareObservation object.

#### Specify source system information for records representing person accounts and organizations

Use the new SourceSystemIdentifier and SourceSystemModifiedDate fields in the Account object.

#### Specify document reference and diagnostic report information that's the reason for a service request

Use the updated DetailRecordId field in the ClinicalServiceRequestDetail object.

#### Specify a device as the entity that raised a clinical alert

Use the updated RaisedById field in the ClinicalAlert object.

#### Specify a device as the requester or performer in a medication request

Use the updated RequesterId and PerformerId fields in the MedicationRequest object.

#### Specify a device as the requester or performer in a service request

Use the updated RequesterId and PerformerId fields in the ClinicalServiceRequest object.

### Specify a device that's implanted in or used to perform a medical procedure

Use the updated DetailRecordId field in the PatientMedicalProcedureDetail object.

## Add business identifiers for providers and board certifications

Use the updated Identifier object.

# Provider Network Management Data Model

#### Record the case associated with a provider's application form

Use the new ApplicationCase object.

#### Associate a provider taxonomy with a specialty

Use the new CareSpecialtyTaxonomy object.

#### Store information about a provider's business license

Use the new LicenseNumber, Description, IssueDate,LicenseClass, and IsPrimaryLicense fields in the BusinessLicense object.

#### Specify source system information for records that represent a provider's business license

Use the new SourceSystemUpdateDate field in the BusinessLicense object.

#### Store dates related to a legal action taken against a provider

Use the new IncidentDate, IncidentReportedDate, and ActionIssueDate fields in the CareProviderAdverseAction object.

#### Store the insurance information related to a legal action taken against a provider

Use the new InsuranceProviderName and InsurancePolicyNumber fields in the CareProviderAdverseAction object.

#### Specify the penalty amount charged to a provider involved in a legal action

Use the new PenaltyAmount field in the CareProviderAdverseAction object.

#### Store details about the regulatory body involved in a legal action against a provider

Use the new RegulatoryBody and RegulatoryBodyType fields in the CareProviderAdverseAction object.

#### Establish a hierarchical relationship between taxonomy records

Use the new ParentTaxonomyId field in the CareTaxonomy object.

#### Store detailed information about a provider's application form

Use the new ContactId, ApplicationReferenceNumber, and HealthcareProviderId fields in the IndividualApplication Object.

#### Store details about a provider's educational qualification

 $Use the {\tt new CertificateIdentifier, InstitutionAddress, and ProgramName fields in the PersonEducation object.}$ 

#### Store details about the employment history associated with a provider

Use the new HealthcareProviderId, EmploymentType, Description, VerificationStatus, and VerificationDate fields in the PersonEmployment Object.

#### **Utilization Management Data Model**

## Add reviewers to manage the preauthorization approval process

Use the new CareRequestReviewer object.

#### Store member plan information in the CareRequest record

Use the new MemberPrimaryPlan and MemberSecondaryPlan fields in the CareRequest object.

### Specify the reason for appealing a denied preauthorization request

Use the new AppealRequestReasonType field in the CareRequest object.

#### Record notification time for denied preauthorization requests

Use the new InitialDenialNotificationTime and ReconsiderationDenialNotificationTime fields in the CareRequest object.

#### Specify the grievance type towards a decision

Use the new GrievanceType field in the CareRequest object.

#### Store additional information about a request

Use the new IsReadmission and ReferenceCareRequestCase fields in the CareRequest object.

#### Record information about the dispensed medication

Use the new MedicationCode, DecisionDate, and DispensingPharmacy fields in the CareRequestDrug object.

#### Specify details about the clinical determination of a medication request

 $Use the {\tt new Clinical Determination}, {\tt Clinical Determination Note}, {\tt and Clinical Determination Reason} fields {\tt in the Care Request Drug object}.$ 

### Store information about the reason for requesting an extension on medical services

Use the new RequestExtensionReason and RequestExtnDecisionDateTime fields in the CareRequestExtension object.

## Store details about reopened requests

Use the new ReopenedBy, ReopenDecisionDateTime, ReopenRequestOutcome, and ReopenRequestType fields in the CareRequestExtension object.

#### Specify details about the outcome of the request

Use the new RequestOutcome and RequestOutcomeDesc fields in the CareRequestExtension object.

#### Specify details about the outcome of the request

Use the new RequestOutcome, RequestOutcomeDesc, and AppealEffectuationDateTime fields in the CareRequestExtension object.

#### Capture details about independent reviews made on a request

Use the new IsIndependentReviewRequired, IndependentReviewDetermination, IndependentReviewDeterminationDate, and IndependentReviewSubmissionDate fields in the CareRequestExtension object.

## Store additional details about care requests

Use the new PriorDischargeStatus, ResolutionDescription, and HealthcareProvider fields in the CareRequestExtension object.

#### Store information about a patient's hospitalization duration

Use the new CumulativeLengthOfStay, ApprovedLengthOfStay, and RequestedLengthOfStay fields in the CareRequestItem object.

#### Store information about the level of care a patient received

Use the new ApprovedLevelOfCare, CurrentLevelOfCare, DeniedLevelOfCare, ModifiedLevelOfCare, and RequestedLevelOfCare fields in the CareRequestItem object.

#### Specify the start and end dates of a requested service

 $\label{thenew_RequestedServiceStartDate} Use the {\tt new_RequestedServiceEndDate} \ fields in the {\tt CareRequestItem_Object}.$ 

## Specify the start and end dates of an approved service

 $\label{the:local_proved_service} Use the \ new\ Approved Service EndDate\ fields in the\ CareRequest Item\ object.$ 

#### Specify details about the clinical determination of a care request

 $\label{thm:convergence} Use the {\tt new ClinicalDetermination}, {\tt ClinicalDeterminationNote}, {\tt and ClinicalDeterminationReason} fields in the {\tt CareRequestItem object}.$ 

#### Record the date when a decision was made for a request

Use the new DecisionDate field in the CareRequestItem object.

#### Store information using industry defined codes

Use new fields that lookup to code sets and code set bundles to store information

- DiagnosisCodeSet field in the CareBarrierType object.
- DiagnosisCodeSet, DischargeDiagnosisCodeSet, and ModifiedDiagnosisCodeSet fields in the CareDiagnosis object.
- ProcedureCodeSet field in the CareInterventionType object.
- ModifierCodeSet, ProcedureCodeSet, and ModifiedProcedureCodeSet fields in the CareRequestType object.

# Connect REST API

Health Cloud REST API includes enhanced calls.

#### **Care Services**

#### **Care Diagnosis Input**

This request body has these new properties.

- careRequestReviewers—Care diagnosis associated with the care request reviewer.
- diagnosisCodeSet—Diagnosis code set.
- dischargeDiagnosisCodeSet—Discharge diagnosis code set associated with the care diagnosis.
- modifiedDiagnosisCodeSet—Modified diagnosis code set associated with the care diagnosis.

#### **Care Request Input**

This request body has these new properties.

- appealEffectuationDateTime—Effective date of the outcome of the appeal request.
- appealRequestReasonType—Reason for raising the appeal request.
- careRequestReviewers—Care request associated with the care request reviewer.
- grievanceType—Type of grievance.
- healthCareProvider—Healthcare provider associated with the care request.
- independentReviewDetermination—Determination made by the independent review.
- independentReviewDeterminationDate—Date when the determination was made by the independent review.
- independentReviewSubmissionDate—Date when the review request was submitted for independent review.
- initialDenialNotificationTime—Time when the initial care request was denied.

- isIndependentReviewRequired—Indicates whether independent review is required.
- isReadmission—Indicates whether the care request is for a readmission.
- memberPrimaryPlan—Primary insurance plan of a member.
- memberSecondaryPlan—Secondary insurance plan of a member.
- priorDischargeStatus—Previous discharge status of the member.
- reconsiderationDenialNotificationTime—Time of reconsideration denial notification.
- referenceCareRequestCase—Reference care request case number associated with the care request.
- reopenDecisionDateTime—Date and time the request was reopened.
- reopenRequestOutcome—Result of the reopen request.
- reopenRequestType—Type of reopen request.
- reopenedBy—User who reopened the care request.
- reopenedByUserId—ID of the user who reopened the care request.
- requestExtensionReason—Reason for requesting the care extension.
- requestExtnDecisionDateTime—Date when the decision to extend the care request.
- requestOutcome—Outcome of the request.
- requestOutcomeDesc—Description of the request outcome.
- resolutionDescription—Resolution details provided for the complaint, appeal, or grievance.

#### **Care Request Drug Input**

This request body has these new properties.

- careRequestReviewers—Care request drug associated with the care request reviewer.
- clinicalDetermination—Clinical determination of the drug request.
- clinicalDeterminationNote—Notes related to the clinical determination.
- clinicalDeterminationReason—Reason for the clinical determination.
- decisionDate—Date and time when the decision was made for this drug request.
- dispensingPharmacy—Pharmacy that dispenses the drug.
- medicationCode—Code of the care request drug.

## **Care Request Items Input**

This request body has these new properties.

- approvedLengthOfStay—Number of days requested for the admission.
- approvedLevelOfCare—Approved level of care for the patient.
- approvedServiceEndDate—End date of the approved service that the patient received.
- approvedServiceStartDate—Care request item associated with the care request reviewer.
- clinicalDetermination—Notes related to the clinical determination.
- clinicalDeterminationReason—Reason for the clinical determination.
- cumulativeLengthOfStay—Number of days a patient is admitted.
- currentLevelOfCare—Level of care the patient is receiving.
- decisionDate—Date and time when the last decision was made for this care request item.
- deniedLevelOfCare—Level of care denied for the patient.
- modifiedLevelOfCare—Modified level of care for the patient.
- modifiedProcedureCodeSet—Code set for the modified service, drug, or device associated with the care request item.

- modifierCodeSet—Modifier code set for the service code associated with the care request item.
- procedureCodeSet—Code set for the service, drug, or device associated with the care request item.
- requestedLengthOfStay—Number of days requested for the admission.
- requestedLevelOfCare—Requested level of care for the patient.
- requestedServiceEndDate—End date of the requested service.
- requestedServiceStartDate—Start date of the requested service.

#### **Care Request Reviewer Input**

This new request body has these properties.

- id—ID of the care request reviewer.
- reviewDate—Date when the care request was reviewed.
- reviewer—Name of the user who reviewed the care request.
- reviewerNotes—Notes related to the review.
- reviewerType—Type of the reviewer who reviewed the care request.
- Status—Status of the care request.

## **Reopened By Input**

This new request body has this property.

username—User who reopened the care request.

# Apex: New Items

Health Cloud has these new classes, interface, and enums.

#### **New Classes**

## Pass a set of options to book a healthcare appointment in an external scheduling system

Use these methods in the healthcloudext.BookAppointmentRequest class. This class has these properties.

- appointmentType—Represents the type of appointment
- note—Represents optional extra information about the appointment.
- serviceType—Specifies the type of service to be performed at the appointment
- slot—Represents the time period slot that's assigned to the appointment.
- sourceFacilityId—Represents the healthcare facility ID.
- sourcePatientId—Represents the ID of the patient in the source system.
- sourcePractitionerId—Represents the person who is performing care in the encounter.
- sourceSystem—Represents the name of the source system the patient record came from.

#### Retrieve information about the appointment from an external scheduling system

Use the healthcloudext.BookAppointmentResponse class. This class has these properties. This class has these properties.

- appointmentId—Represents the unique identifier of the appointment in Health Cloud.
- jsonResponse—Represents the response from the external scheduling system encoded as JSON.
- note—Represents optional extra information added to the appointment.
- patientId—Represents the unique identifier of the patient in Health Cloud.
- slotEnd—Represents the date and time that the available time slot ends.

- slotStart—Represents the date and time that the available time slot starts.
- sourceAppointmentId—Represents the unique identifier of the appointment in the source system.
- sourcePatientId—Represents the ID of the patient in the source system.
- sourceSystem—Represents the name of the external scheduling system from which the record was sourced.
- status—Represents the status of the appointment.

#### Pass a set of options to cancel a healthcare appointment

Use the healthcloudext.CancelAppointmentRequest class. This class has these properties.

- appointmentId—Unique ID of the appointment in Health Cloud.
- appointmentType—Represents the type of appointment.
- cancelationReason—Represents the reason for canceling the appointment.
- serviceType—Specifies the type of service to be performed at the appointment.
- slot—Represents the time period slot that's assigned to the appointment.
- sourceFacilityId—Represents the healthcare facility ID.
- sourcePatientId—Represents the ID of the patient in the source system.
- sourcePractitionerId—Represents the ID of the practitioner who is performing care in the encounter.
- sourceSystem—Name of the external scheduling system from which the record was sourced.

#### Retrieve information about the appointment cancellation from an external scheduling system

Use the healthcloudext.CancelAppointmentResponse class. This class has these properties.

- externalAppointmentId—Represents the appointment identifier from the external scheduling system.
- jsonResponse—Represents the response from the external scheduling system encoded as JSON.
- serviceAppointmentId—Represents the ID of the service appointment that you want to update.
- status—Represents the status of the healthcare appointment.

# Pass a set of options to find available time slots for providers who match the patient's needs

Use the healthcloudext. FindSlotsRequest class. This class has these properties.

- slotRangeEdn—Represents the start of date range for time slots.
- slotRangeStart—Represents the end of date range for time slots.

#### Pass a set of options to retrieve the time slots status

Use these methods in the healthcloudext.GetSlotStatusRequest class. This class has these properties.

- slotId—Unique identifier for the time period slot in the external scheduling system that's assigned to the appointment
- slotSourceSystem—Name of the external scheduling system from which the time period slot record came from.
- slotSourceSystemId—Represents the ID of the source system from which the request was sourced.

#### Retrieve the time slot details of the healthcare appointment

Use the healthcloudext.Slot class. This class has these properties.

- slotEnd—Represents the date and time that the appointment time slot ends.
- slotStart—Represents the date and time that the appointment time slot starts.
- slotStatus—Represents the status of the time slot for the healthcare appointment.
- sourceSlotId—Represents the ID of the time slot in the external scheduling system.
- sourceSystem—Represents the name of the external scheduling system from which the record was sourced.

#### New Interface

# Allow an implementing class to communicate with external source system, and get the appointment information back from an external appointment booking system

Use the new healthcloudext.AppointmentBookingInteropinterface.

#### **New Fnums**

## Specifies a possible status for a healthcare appointment

Use the new healthcloudext.BookingStatus enum. The enum has these values:

- Canceled
- NoShow
- Proposed
- Rejected
- Scheduled

#### SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.health\_doud\_object\_reference.meta/health\_doud\_object\_reference/apex\_namespace\_health.doudext.htm

# Consumer Goods Cloud

Execute mobile capabilities on desktop using the Consumer Goods Visit Execution app. Easily configure Consumer Goods cloud with the Consumer Goods Setup assistant. Track store manager satisfaction by adding a signature task to a visit. Sales managers can check field reps' availability to avoid scheduling conflicts when assigning visits.

#### IN THIS SECTION:

#### Make Virtual Visits with the Consumer Goods Visit Execution App

Use all visit execution mobile capabilities on a desktop to monitor your stores virtually. The new Consumer Goods Visit Execution app lets your reps complete store visits without going to the store.

## Get Going with the Consumer Goods Setup Assistant

Now there's a one-stop interface so you can configure Consumer Goods faster and access related technical documentation. And the progress indicator shows how you're doing.

#### Ensure Better Visit Execution with Signature Tasks

Keep up with how satisfied your store managers are with visit tasks by adding a signature task to a visit. A signature task requires field reps to get a store manager sign-off after visit tasks are completed.

### Improve Visit Planning with Salesforce Calendar Integration

Help sales managers check field reps' availability to avoid scheduling conflicts when assigning visits. Now when a sales manager creates a visit and assigns it to a field rep, the visit appears on the Salesforce calendar. Field reps can check their calendars for scheduled visits and plan their day accordingly.

#### Manage Availability with Account Hierarchy for Products (Pilot)

The products that a sales manager assigns to a retail store parent account are now automatically available to all stores in that account hierarchy. Previously, the sales manager assigned products to each store individually.

#### Other Enhancements to Consumer Goods Cloud

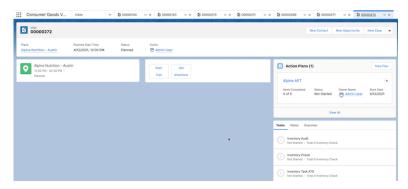
Learn about other small but important improvements to Consumer Goods Cloud.

# Make Virtual Visits with the Consumer Goods Visit Execution App

Use all visit execution mobile capabilities on a desktop to monitor your stores virtually. The new Consumer Goods Visit Execution applets your reps complete store visits without going to the store.

**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: From the App Launcher, select Consumer Goods Visit Execution.



SEE ALSO:

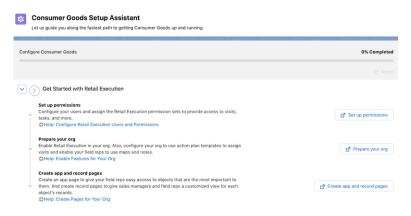
Consumer Goods Visit Execution App

# Get Going with the Consumer Goods Setup Assistant

Now there's a one-stop interface so you can configure Consumer Goods faster and access related technical documentation. And the progress indicator shows how you're doing.

**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: From the App Launcher, find and open the Consumer Goods app, and then click the Consumer Goods Setup Assistant tab.



SEE ALSO:

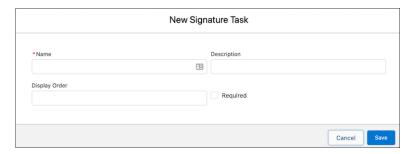
Use Consumer Goods Setup Assistant Guidance

# **Ensure Better Visit Execution with Signature Tasks**

Keep up with how satisfied your store managers are with visit tasks by adding a signature task to a visit. A signature task requires field reps to get a store manager sign-off after visit tasks are completed.

**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 Signature Task**.



SEE ALSO:

Add a Signature Task Component to a Record Page
Associate Signature Tasks to an Action Plan Template

# Improve Visit Planning with Salesforce Calendar Integration

Help sales managers check field reps' availability to avoid scheduling conflicts when assigning visits. Now when a sales manager creates a visit and assigns it to a field rep, the visit appears on the Salesforce calendar. Field reps can check their calendars for scheduled visits and plan their day accordingly.

**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:** From Setup, in the Quick Find box, enter *Visit Calendar Settings*, and then select **Visit Calendar Settings**. Enable **Add Visits to Salesforce Calendar**.



SEE ALSO:

Set Up Salesforce Calendar

# Manage Availability with Account Hierarchy for Products (Pilot)

The products that a sales manager assigns to a retail store parent account are now automatically available to all stores in that account hierarchy. Previously, the sales manager assigned products to each store individually.

**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.



**Note**: We provide Account Hierarchy for Products 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.

**How:** From Setup, in the Quick Find box, enter *Retail Execution Settings*, and select **Retail Execution Settings**. Enable **Account hierarchy for products**.



# Other Enhancements to Consumer Goods Cloud

Learn about other small but important improvements to Consumer Goods Cloud.

**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.

#### **Capture More Information When Performing Visits**

When recording observations during a task, field reps can now upload images and other related files for visits, assessment tasks, and visit key performance indicators (KPIs).

#### **Assign a Store to Multiple Store Groups**

On a retail store or a retail store group record page, use the Retail Store Group Assignment related list to assign a retail store to multiple retail store groups. The store automatically inherits the KPIs from all of the retail store groups.

#### **Active and Valid Products Available for Placing Order**

A field rep can place orders for products that are marked as active and if the order placing date is within the date range of the product validity. Also, when a sales manager adds an action plan to a visit to generate the retail visit KPIs for inventory tasks, then retail visit KPI is generated only for products that are active and valid.

#### **Create Valid Product Orders**

The Account Currency field on an account is now mandatory to ensure that your products always have an associated currency during order creation.

# Manufacturing Cloud

Manage sales agreements and account forecasts easily with new features and enhancements. Revise active or approved sales agreements to include more products. Filter account forecasts and sales agreement schedules by time period. Update name, description, and contact details for an active, approved, canceled, or expired sales agreement. Update actual quantities of products for past schedules using the Manually using API upload option.

#### IN THIS SECTION:

#### Revise Sales Agreements to Adapt to Customer Requirements

Your account managers can now revise active or approved sales agreements to include more products. When a new product line is introduced or an existing line is expanded to include more products, there's no need for account managers to create new sales agreements for customers.

#### Manage Account Forecasts and Sales Agreement Schedules with Time Filters

With the time filter option, your account managers can filter, view, and update critical forecasting data. Also, they can choose to save account forecasts for a certain range or selected periods.

Manufacturing Cloud Has a New Invocable Action

Do more with this new invocable action in Manufacturing Cloud.

Manufacturing Cloud Has a New Action Type Value

Manufacturing Cloud has a new actionType enumeration value.

# Revise Sales Agreements to Adapt to Customer Requirements

Your account managers can now revise active or approved sales agreements to include more products. When a new product line is introduced or an existing line is expanded to include more products, there's no need for account managers to create new sales agreements for customers.

**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:** From an active sales agreements page, on the Agreement Terms tab, click **Add Products**. Select and add more products to the sales agreement. Then submit the revised sales agreement for approval.

Change an approved sales agreement manually to draft status, and then on the Agreement Terms tab, click **Add Products**. Select and add more products to the sales agreement. Then submit the revised sales agreement for approval.



SEE ALSO:

Add Products to a Sales Agreement

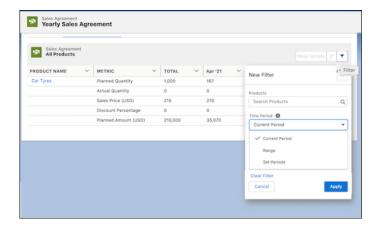
# Manage Account Forecasts and Sales Agreement Schedules with Time Filters

With the time filter option, your account managers can filter, view, and update critical forecasting data. Also, they can choose to save account forecasts for a certain range or selected periods.

**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 and Manufacturing Account Forecasting permission sets

**How:** On the Agreement Terms tab in Sales Agreements, or the Forecast Tab in Accounts, click the filter icon, and select the required time periods.



Filter Account Forecasts by Time Period
Filter Sales Agreement Schedules by Time Period

# Manufacturing Cloud Has a New Invocable Action

Do more with this new invocable action in Manufacturing Cloud.

### **Calculate Advanced Account Forecasts**

Use the new calculateAdvancedAccountForecast standard action to calculate forecasts for an account based on the formulae associated with the forecast set.

# Manufacturing Cloud Has a New Action Type Value

Manufacturing Cloud has a new actionType enumeration value.

# Use the Manufacturing Cloud action with Flows to calculate forecasts for an account based on the formulae associated with the forecast set

 $\label{thenew} Use the new \verb|calculateAdvancedAccountForecast| enumeration value on the action Type | field on the Flow Action Call subtype of the Flow metadata type.$ 

# **Loyalty Management**

Get a holistic view of your loyalty program from the Home page. Use included templates to create a benefit action. Create and define input variables for benefit actions.

### IN THIS SECTION:

#### Customize Reusable Promotion Emails

Engage your loyalty program members with personalized emails. Drag the new Loyalty Promotions content block right into your email or email template. Select an audience, preview, and test content. Send promotions with clicks, not code.

### Loyalty Management Objects Available in Marketing Cloud Connect

You can now import your Loyalty Management data into Marketing Cloud using Marketing Cloud Connect API v51.

# View Member Information from Any Salesforce Application

Use the Loyalty Member Profile cards to better understand the profile of a person or business and perform member actions. View a member's loyalty program, membership status and tier, qualifying and non-qualifying currency balance, membership benefits, and recent transactions from any Salesforce application.

### Integrate with Service Cloud

Empower your service team members to serve your most loyal customers better and create a connected experience. Create a case and populate the fields right on a loyalty member profile.

## Get a Head Start on your Day with the Home Page

You can now get a high-level view of your loyalty program and view key information when you log in to Loyalty Management. The Home page displays the recently updated promotions and loyalty program partners.

### Use Included Templates to Create Benefit Actions

Create benefit actions for common scenarios such as issuing a voucher, assigning a support entitlement, giving a free sample, or allocating a market development fund using the new Loyalty Management templates. You can also use the templates as a reference to set up custom actions.

### Define Input Variables in Benefit Actions

Give your users the flexibility to change the behavior of a benefit action. Create and define input variables when creating benefit actions. Your users can enter values for these in the Map benefits to actions screen.

### Validate Partners and Partner Products in Transaction Journals

Use our new Validate Partners and Partner Products in Transaction Journals job to validate the accrual transaction journal records before running further point-calculation processes.

### Set Field-Level Security

Use field-level security when you want users to have access to an object, but limit their access to individual fields in that object. For example, your payroll manager can make salary fields accessible only to certain employees. Field-level security settings let you control users' access to view, edit, and delete specific fields.

#### **Enable End-User Languages**

Loyalty Management now supports the Arabic, Czech, English (UK), Hebrew, Hungarian, and Portuguese (European) end-user languages.

### View and Track Points Earned Through a Promotion

Use the new Promotion field in the Ledger screen to associate a promotion with a loyalty transaction. You can add the Promotion ID to the Credit Points, Debit Points, and Adjust Points actions to facilitate the tracking of points earned for a promotion. You can also inherit the Promotion IDs from the Transaction Journal if they are available via the incoming transaction.

# Verify Segment Membership

Verify that a member belongs to a qualifying segment for a promotion when crediting or debiting points for a transaction. The Salesforce Query API queries Salesforce CDP to confirm segment membership. You can also use the API to verify a member's qualification for a promotional voucher.

### Enable the Fulfillment of Promotions Through a Flow Template

Based on the input promotion, the Flow determines whether to issue a voucher or to credit points to a loyalty program member. For cumulative promotions, it also creates or updates the loyalty program member's promotion record with the appropriate progress.

### Select the Enrollment Required Checkbox to Enter Enrollment Details

When creating a new promotion, you can enter the enrollment start and end dates only after you check the Enrollment Required checkbox.

# View Promotions Associated with a Campaign

You can now view all promotions associated with a campaign on the Campaign record page.

#### View Vouchers Associated with a Transaction Journal

You can now view all vouchers associated with a Transaction Journal on the Transaction Journal record page.

### Run Loyalty Programs on Hyperforce

Loyalty Management is now available on Hyperforce. You can create, administer, and run loyalty programs on Hyperforce.

### Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus. If your Salesforce org is in Government Cloud or Government Cloud Plus, you can't create Data Processing Engine definitions or clone the template definitions provided with Loyalty Management.

### New and Changed Objects in Loyalty Management

Do more with new and updated Loyalty Management objects.

### Loyalty Management Has a New Metadata Type

Loyalty Management has new a metadata type.

### Loyalty Management Has a New Tooling API Object

Use Tooling API to work with the Loyalty Management setup object.

# Customize Reusable Promotion Emails

Engage your loyalty program members with personalized emails. Drag the new Loyalty Promotions content block right into your email or email template. Select an audience, preview, and test content. Send promotions with clicks, not code.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions that have Loyalty Management and Marketing Cloud enabled.

How: Log in to Marketing Cloud and navigate to the Content Builder. Click Create, and then click Email Message or Email Template.

# Loyalty Management Objects Available in Marketing Cloud Connect

You can now import your Loyalty Management data into Marketing Cloud using Marketing Cloud Connect API v51.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited Editions that have Loyalty Management and Marketing Cloud enabled.

SEE ALSO:

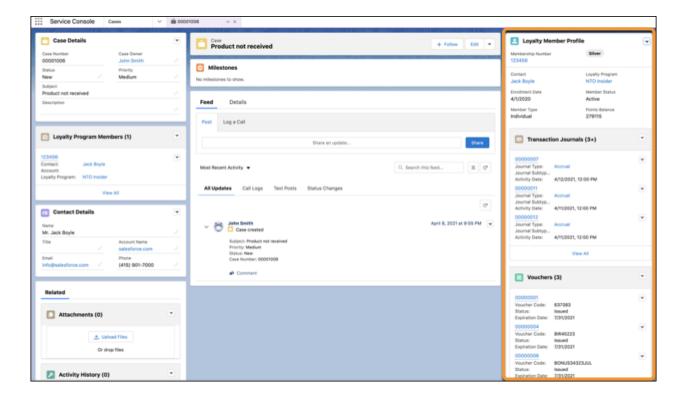
Release Notes: Marketing Cloud Connect API v51 Upgrade (can be outdated or unavailable during release preview)

# View Member Information from Any Salesforce Application

Use the Loyalty Member Profile cards to better understand the profile of a person or business and perform member actions. View a member's loyalty program, membership status and tier, qualifying and non-qualifying currency balance, membership benefits, and recent transactions from any Salesforce application.

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

**How:** Use the Lightning App Builder to add the Loyalty Member Profile card to the record page for your object. Click **Edit Page**. When the Lightning App Builder launches, drag the Loyalty Member Profile card from the left panel. Configure the Contact or Account field and the related lists. Save your changes and then click **Activate**.

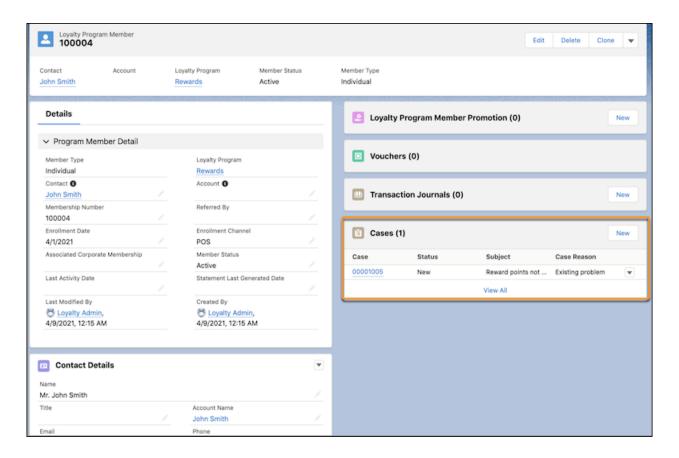


# Integrate with Service Cloud

Empower your service team members to serve your most loyal customers better and create a connected experience. Create a case and populate the fields right on a loyalty member profile.

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

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to the Loyalty Programs page, click on a loyalty program member, and click **New** in the Cases related list.

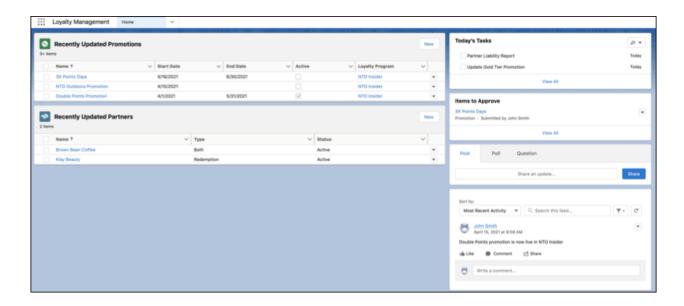


# Get a Head Start on your Day with the Home Page

You can now get a high-level view of your loyalty program and view key information when you log in to Loyalty Management. The Home page displays the recently updated promotions and loyalty program partners.

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

**How:** From Setup, in the Quick Find box, enter Loyalty, and then select **Loyalty Management**. The Home page is displayed by default.

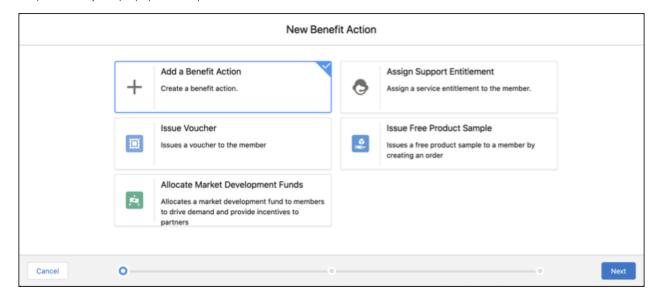


# Use Included Templates to Create Benefit Actions

Create benefit actions for common scenarios such as issuing a voucher, assigning a support entitlement, giving a free sample, or allocating a market development fund using the new Loyalty Management templates. You can also use the templates as a reference to set up custom actions.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled. For some templates, you may need Service Cloud or Experience Cloud enabled.

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to Benefit Actions and select one of the available templates. Verify the prepopulated input variables and then save and use the Benefit Action.

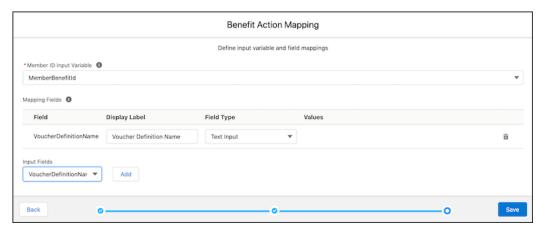


# Define Input Variables in Benefit Actions

Give your users the flexibility to change the behavior of a benefit action. Create and define input variables when creating benefit actions. Your users can enter values for these in the Map benefits to actions screen.

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

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to Benefit Actions. Click **New**. Select a Flow and associate it with the input variables. Save the Benefit Action and activate it.

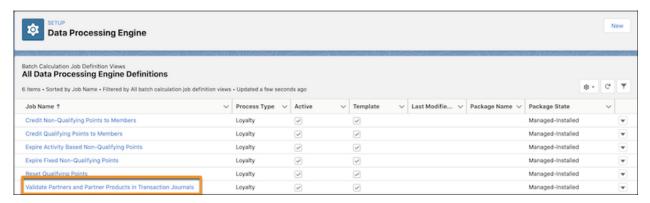


# Validate Partners and Partner Products in Transaction Journals

Use our new Validate Partners and Partner Products in Transaction Journals job to validate the accrual transaction journal records before running further point-calculation processes.

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

**How:** From Setup, find and select **Data Processing Engine**. Search for the Validate Partners and Partner Products in Transaction Journals job.



SEE ALSO:

Salesforce Help: Run a Data Processing Engine Definition (can be outdated or unavailable during release preview)

# Set Field-Level Security

Use field-level security when you want users to have access to an object, but limit their access to individual fields in that object. For example, your payroll manager can make salary fields accessible only to certain employees. Field-level security settings let you control users' access to view, edit, and delete specific fields.

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

**How:** From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**. To update the settings for a profile, navigate to the Field-Level Security section for that profile. Select an entity and edit access to the fields in that entity.

For Loyalty Management, field-level security is enabled for these entities:

- LoyaltyProgramMember
- LoyaltyProgramCurrency
- LoyaltyTierGroup
- LoyaltyMemberCurrency
- LoyaltyMemberTier
- LoyaltyProgramPartner
- TransactionJournal
- Voucher
- Promotion
- Benefit
- MemberBenefit

# **Enable End-User Languages**

Loyalty Management now supports the Arabic, Czech, English (UK), Hebrew, Hungarian, and Portuguese (European) end-user languages.

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

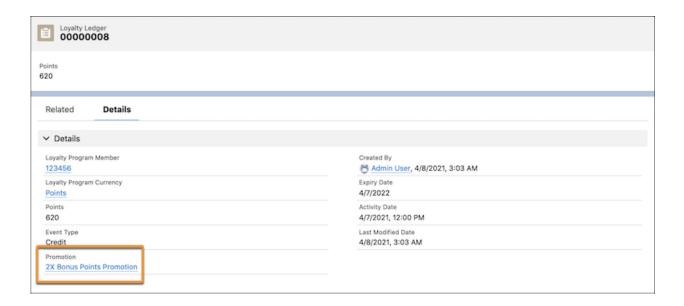
**How:** From Setup, in the Quick Find box, enter *Company Settings*, then select **Language Settings**. Enable the end-user languages checkbox. From the Available Languages window, select the languages you want to enable and move them to the Selected Languages window. Your users can then go to **Language and Time Zone** to update the languages.

# View and Track Points Earned Through a Promotion

Use the new Promotion field in the Ledger screen to associate a promotion with a loyalty transaction. You can add the Promotion ID to the Credit Points, Debit Points, and Adjust Points actions to facilitate the tracking of points earned for a promotion. You can also inherit the Promotion IDs from the Transaction Journal if they are available via the incoming transaction.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled with B2C-Loyalty or B2C-Loyalty Plus license.

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to the Transaction Journal or Ledger screen to view the associated Promotion ID.



# Verify Segment Membership

Verify that a member belongs to a qualifying segment for a promotion when crediting or debiting points for a transaction. The Salesforce Query API queries Salesforce CDP to confirm segment membership. You can also use the API to verify a member's qualification for a promotional voucher.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Developer, and Unlimited Editions where Loyalty Management with B2C license is enabled. The Salesforce org must have Salesforce CDP enabled.

### SEE ALSO:

*Release Notes*: Activate to Salesforce CDP to Create Personalized Customer Experiences (can be outdated or unavailable during release preview)

Release Notes: Query Across Your Enterprise Using the Salesforce CDP Object (can be outdated or unavailable during release preview)

# Enable the Fulfillment of Promotions Through a Flow Template

Based on the input promotion, the Flow determines whether to issue a voucher or to credit points to a loyalty program member. For cumulative promotions, it also creates or updates the loyalty program member's promotion record with the appropriate progress.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled with B2C-Loyalty or B2C-Loyalty Plus license.

**How:** From Setup, in the Quick Find box, enter *Flows*, then select **Flows**. The Promotion Fulfillment Flow is listed under All Flows. Save this as a new Flow and then use it.

# Select the Enrollment Required Checkbox to Enter Enrollment Details

When creating a new promotion, you can enter the enrollment start and end dates only after you check the Enrollment Required checkbox.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled with B2C-Loyalty or B2C-Loyalty Plus license.

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to the Loyalty Programs tab and select your loyalty program. On the Loyalty Experiences tab, click **Promotions**, and then click **New**.

# View Promotions Associated with a Campaign

You can now view all promotions associated with a campaign on the Campaign record page.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled with B2C-Loyalty or B2C-Loyalty Plus license.

**How:** Navigate to **Setup** > **Object Manager** > **Account** > **Page Layouts**. Look for Campaigns under the related lists and then drag it. Save the page layout.

# View Vouchers Associated with a Transaction Journal

You can now view all vouchers associated with a Transaction Journal on the Transaction Journal record page.

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

**How:** From the App Launcher, find and select **Loyalty Management**. Navigate to the Loyalty Programs tab and select your loyalty program. On the Loyalty Program record page, select a loyalty program member. On the Loyalty Program Member's record page, click **Transaction Journals**.

# Run Loyalty Programs on Hyperforce

Loyalty Management is now available on Hyperforce. You can create, administer, and run loyalty programs on Hyperforce.

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

**When:** This update is available starting as of the Spring '21 release.

**How:** To learn more about using Loyalty Management on Hyperforce, contact your Salesforce representative.

#### SEE ALSO:

Salesforce Help: Loyalty Management on Hyperforce (can be outdated or unavailable during release preview)

Knowledge Article: Introducing Hyperforce - General Information & FAQ (can be outdated or unavailable during release preview)

Legal: Salesforce Unified Cloud (Hyperforce) Security, Privacy and Architecture (can be outdated or unavailable during release preview)

# Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus. If your Salesforce org is in Government Cloud or Government Cloud Plus, you can't create Data Processing Engine definitions or clone the template definitions provided with Loyalty Management.

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

**When:** This also applies to the Spring '21 release. We'll let you know when Data Processing Engine is available in Government Cloud and Government Cloud Plus.

# New and Changed Objects in Loyalty Management

Do more with new and updated Loyalty Management objects.

### View the flow associated with a benefit action

Use the new FlowDefinition field on the existing BenefitAction object.

### Specify predefined values for a benefit action parameter

Use the new BenefitActionParameterValue object.

### Specify a flow input parameter that's used in a benefit action

Use the new BenefitActionParameter object.

### View the name of the input variable that stores the member benefit ID in a benefit action flow

Use the new MemberBenefitVariableName field on the existing BenefitAction object.

### Specify the runtime values that are used when executing a flow for a benefit action

Use the new BenefitParameterValue object.

### Associate a loyalty program member with a case

Use the new LoyaltyProgramMemberCase object.

### Indicate your primary loyalty program

Use the new IsPrimary field on the existing LoyaltyProgram object.

#### Specify the cost per voucher

Use the new CostPerVoucher field on the existing VoucherDefinition object.

### Specify the maximum number of vouchers to be issued for a promotion

Use the new MaximumVoucherCount field on the existing Promotion object.

### Specify the cost per point for accrual and redemption transactions of a partner

Use the new AccrualCostperUnit and RedemptionCostperUnit Currency fields on the existing LoyaltyProgramPartner object.

#### Associate a promotion to a transaction journal

Use the new PromotionId field on the existing TransactionJournal object.

### View the promotion that's associated with a ledger

Use the new PromotionId field on the existing LoyaltyLedger object.

# View the total points awarded for a promotion to date

Use the new CurrentPointCount field on the existing Promotion object.

### Specify the maximum liability that can be incurred for a promotion

Use the new MaximumLiabilityAmount field on the existing Promotion object.

# View the total liability incurred for a promotion to date

Use the new CurrentLiabilityAmount field on the existing Promotion object.

### View the type of transaction journal that's applied for a promotion

Use the new TransactionJournalType field on the existing Promotion object.

### Indicates whether a promotion is applied by multiplying or dividing points by a factor

Use the new IsPointsWithFactor field on the existing Promotion object.

## Specify the factor that points are to be multiplied or divided by

Use the new PointFactor field on the existing Promotion object.

# Loyalty Management Has a New Metadata Type

Loyalty Management has new a metadata type.

### Create an action that can be automatically triggered for a benefit

Use the new BenefitAction metadata type.

# Loyalty Management Has a New Tooling API Object

Use Tooling API to work with the Loyalty Management setup object.

## Store information about the details of an action that can be automatically triggered for a benefit

Use the new BenefitAction object.

# Rebate Management

Integrate rebates and benefit tiers directly with your CPQ processes and deal negotiations. Seamlessly create and manage end-to-end ship and debit programs. Reduce ambiguities related to revenues and liabilities by calculating the accrual amounts against rebate programs. Make rebate payouts based on account hierarchies by rolling up transactions for subaccounts. Easily convert units of measure for rebate transactions depending on the rebate program.

#### IN THIS SECTION:

## Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes

Create template rebates and incentives with eligibility conditions by considering past incentive performance. View and apply eligible rebate types to orders, quotes, opportunities, sales agreements, or any eligible standard, or custom object records.

# Create and Manage End-to-End Ship and Debit Programs

Help your partners grow their business by selling products at discounted rates to customers and by submitting rebate claims against those transactions. Improve operational efficiency by automatically validating claims and calculating and processing payouts.

### Manage Rebate Payouts for Account Hierarchies

Manage rebate payouts based on account hierarchies by rolling up transactions for subaccounts. Transactions can be recorded at the subaccount level in the currency of the transaction. Automated processes roll up the transactions to the parent level and reward the contracted parent account.

## Calculate Your Potential Liability Against Rebate Programs

Reduce ambiguities related to revenues and liabilities by calculating the accrual amounts against rebate programs. Compute rebates on available transactions at a predefined, potential tier. Calculate accruals at a standard single accrual rate based on sales transactions, orders, or invoices. Or for a more specific projection, accrue against plan data such as a forecast, sales agreement, or other sales planning data.

#### Calculate Payouts for Rebate Transactions with Multiple Units of Measure

Easily convert units of measure for rebate transactions, depending on the individual rebate program. Rebates are calculated for the period that they're configured for. Transactions are recorded in their own unit of measure, for example, 7 kilograms or 10 liters. When calculating payouts, transactions can be converted from the transaction's unit of measure to the rebate type unit of measure, such as liters to kilograms.

## New and Changed Objects for Rebate Management

Do more with these new and changed Rebate Management objects.

# Increase Your Rebate-Driven Sales with Einstein Discovery for Rebate Management (Beta)

Use the Einstein Discovery for Rebate Management app to view rebate-driven sales predictions, identify high-potential accounts to add to rebate programs, and recommend top rebate programs to your customers.

### Rebate Management Has a New Invocable Action

Do more with this new invocable action in Rebate Management.

## Rebate Management Has a New Action Type Value

Rebate Management has a new actionType enumeration value.

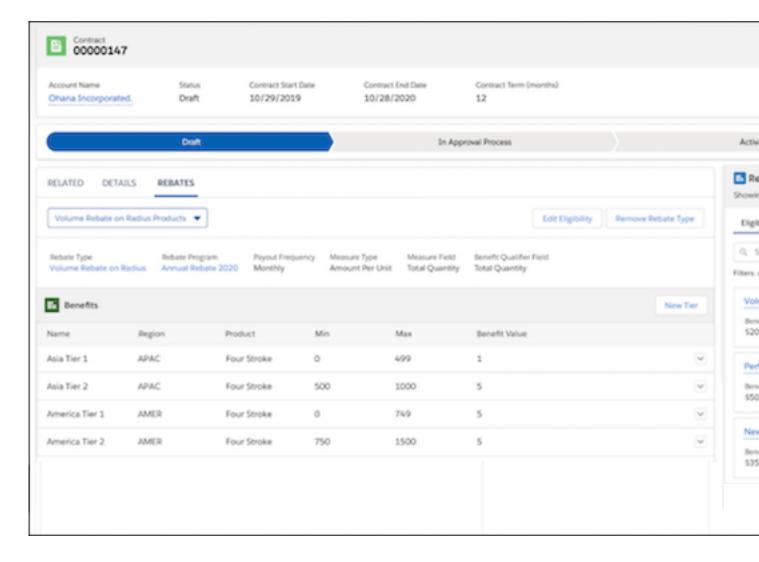
# Integrate Rebate Programs with Your Deal Negotiations and CPQ Processes

Create template rebates and incentives with eligibility conditions by considering past incentive performance. View and apply eligible rebate types to orders, quotes, opportunities, sales agreements, or any eligible standard, or custom object records.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

**How:** Add the Program Rebates Types Panel and Program Rebate Types Tab Lightning App Builder components to an order, contract, sales agreement, quote, service contract, opportunity, entitlement, or any eligible standard, or custom object record page. Select and apply eligible rebate types using the Program Rebate Type Panel component.

After the rebate types are applied, use the Program Rebate Types Tab Lightning App Builder component to view and modify the related benefit tiers.



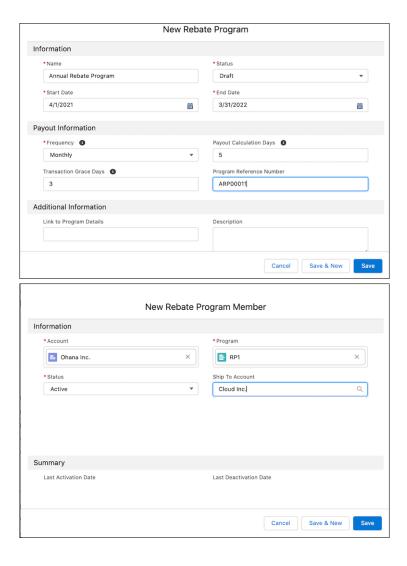
Integrate Rebate Management with CPQ Processes

# Create and Manage End-to-End Ship and Debit Programs

Help your partners grow their business by selling products at discounted rates to customers and by submitting rebate claims against those transactions. Improve operational efficiency by automatically validating claims and calculating and processing payouts.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

**How:** Provide a unique program reference number when creating a ship and debate rebate program. Add a ship to account for a rebate program member to claim rebates against a specific ship and debit rebate program.



Calculate Payouts for Ship and Debit Programs

# Manage Rebate Payouts for Account Hierarchies

Manage rebate payouts based on account hierarchies by rolling up transactions for subaccounts. Transactions can be recorded at the subaccount level in the currency of the transaction. Automated processes roll up the transactions to the parent level and reward the contracted parent account.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

**How:** Use the organization's account hierarchy setup to determine the parent account and subaccounts. Transactions recorded at the subaccount level are automatically rolled up to the contracted parent.



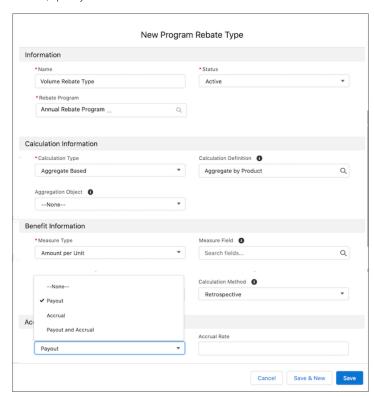
Calculate Payouts for Account Hierarchies

# Calculate Your Potential Liability Against Rebate Programs

Reduce ambiguities related to revenues and liabilities by calculating the accrual amounts against rebate programs. Compute rebates on available transactions at a predefined, potential tier. Calculate accruals at a standard single accrual rate based on sales transactions, orders, or invoices. Or for a more specific projection, accrue against plan data such as a forecast, sales agreement, or other sales planning data.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

**How:** Define an accrual rate based on sales transactions, orders, or invoices for the program rebate type. To calculate payouts, accruals, or both, specify the calculation basis.



# Calculate Payouts for Rebate Transactions with Multiple Units of Measure

Easily convert units of measure for rebate transactions, depending on the individual rebate program. Rebates are calculated for the period that they're configured for. Transactions are recorded in their own unit of measure, for example, 7 kilograms or 10 liters. When calculating payouts, transactions can be converted from the transaction's unit of measure to the rebate type unit of measure, such as liters to kilograms.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

**How:** Update the rebate data processing engine definitions to include UnitOfMeasure and UnitOfMeasureConversion objects as data sources.

# New and Changed Objects for Rebate Management

Do more with these new and changed Rebate Management objects.

# New Objects

#### Convert from one unit of measure to another

Use the new UnitOfMeasureConversion object and the new UnitOfMeasure field on ProgramRebateType object.

# **Updated Objects**

### Manage ship and debit programs

Use the new ShipToAccount field on the RebateProgramMember and TransactionJournal objects and the ProgramReferenceNumber field on the RebateProgram and TransactionJournal objects.

# Manage account hierarchy payouts

Use the new RollupProgramMember and IsPayoutCalcSkipped fields on the RebateProgramMember object.

### Calculate accruals for rebate programs

Use the new AccrualRate field on ProgramRebateType and ProgramRebateTypPayoutSrc objects, the new AccrualAmount field on the RebateProgramMemberPayout, ProgramRebateTypePayout, and ProgramRebateTypPayoutSrc objects, and the new CalculationBasis field on the ProgramRebateType object.

### Integrate rebate types with CPQ processes

Use the new IsIntegratable field on the ProgramRebateType object.

# Cap the benefits for a measure for a rebate type

Use the new MaximumMeasureFieldValue, EffectiveStartDate and EffectiveEndDate fields on the ProgramRebateTypeBenefit object.

# Increase Your Rebate-Driven Sales with Einstein Discovery for Rebate Management (Beta)

Use the Einstein Discovery for Rebate Management app to view rebate-driven sales predictions, identify high-potential accounts to add to rebate programs, and recommend top rebate programs to your customers.

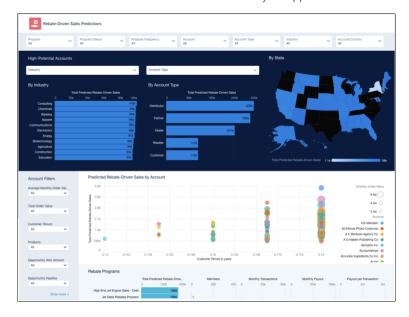
**Where:** This change applies to Tableau CRM in Lightning Experience and all versions of the Salesforce app in Enterprise, Unlimited, and Developer editions.



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

**Who:** To use the Einstein Discovery for Rebate Management dashboards, you must have Rebate Management, Rebate Management User, and Manufacturing Analytics Plus add-on licenses.

**How:** From Tableau CRM Analytics Studio, click **Create**, and choose **App**. Select **Einstein Discovery for Rebate Management**, and then follow the instructions in the wizard to create your app.



# Rebate Management Has a New Invocable Action

Do more with this new invocable action in Rebate Management.

### **Get Eligible Program Rebate Types**

Use the new getEligibleProgramRebateTypes standard action to retrieve the eligible program rebate types for a mapped object.

# Rebate Management Has a New Action Type Value

Rebate Management has a new actionType enumeration value.

## Use the Rebate Management action with Flows to retrieve the eligible program rebate types for a mapped object

Use the new getEligibleProgramRebateTypes enumeration value on the actionType field on the FlowActionCall subtype of the Flow metadata type.

# **Public Sector Solutions**

Speed up document-driven processes using Intelligent Document Automation and the Intelligent Form Reader to recognize and copy data from uploaded files. Inspection management enhancements improve the inspection experience. Public Sector portal changes improve tracking how complaints are handled.

### IN THIS SECTION:

#### Upload Documents Efficiently with Intelligent Form Reader

Entering information from a handwritten intake application can be a tedious, error-prone, manual process. Intelligent Form Reader with Amazon Textract helps get the correct data from the correct documents faster. With Intelligent Form Reader, data from uploaded documents such as applicants' identity and contact information is directly pulled into an online application record, reducing manual document input and management.

## Use Intelligent Document Automation for Public Sector

Use Intelligent Document Automation to make it easier to map and view incoming documents to application forms and Public Sector objects. To transform a document, a reviewer pulls apart the document to route the pages to where they must go. So, when a reviewer transforms a document, they can choose from document checklist items rather than finding or creating them.

#### Inspection Management Enhancements

Help your field inspectors deliver inspections more efficiently by enabling your administrators to define relevant assessment questions that can be answered accurately using integer, decimal, percentage responses. The questions associated with an inspection task can also be predefined logically to help your inspectors perform their visit in the most effective order.

### More Flexible Complaint Tracking on the Public Sector Portal

To help your constituents track public complaint cases submitted by others, configure the site's complaint case pages. When a public complaint is raised on the portal, each department involved can create a case record to track it. For example, the environmental agency and the fire department both can handle a hazardous chemical complaint.

# New Objects in Public Sector Solutions

Salesforce Public Sector Solutions has new objects that help store and access information.

# Upload Documents Efficiently with Intelligent Form Reader

Entering information from a handwritten intake application can be a tedious, error-prone, manual process. Intelligent Form Reader with Amazon Textract helps get the correct data from the correct documents faster. With Intelligent Form Reader, data from uploaded documents such as applicants' identity and contact information is directly pulled into an online application record, reducing manual document input and management.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions and Intelligent Form Reader with Amazon Textract (1,000 pages) are enabled.

**How:** Administrators can map document types to Public Sector data objects. When intake officers upload forms in PDF, PNG, or JPEG format, Public Sector Solutions automatically creates a record for each document. Amazon Textract pulls the data from the image into the record, and Public Sector Solution's review document component distributes the values extracted by optical character recognition (OCR) into the fields mapped by the admin.

#### IN THIS SECTION:

### Capture Application Data Automatically Using Mappings

Reduce the manual effort required to capture your constituents' application data. You can automate data submitted by your constituents such as a business license application using optical character recognition (OCR) mapping. You can create, modify, or verify an application record.

#### Extract and Verify Information from Uploaded Documents

Avoid time-consuming and error-prone manual data entry with automatic data upload to streamline data upload and verification. Use optical character recognition (OCR) technology to extract fields from documents that your constituents' upload for business license application requests. Using the Intelligent Form Reader's capability, you can create Document Checklist Items to verify the uploaded data.

# SEE ALSO:

Einstein Release Notes

# Capture Application Data Automatically Using Mappings

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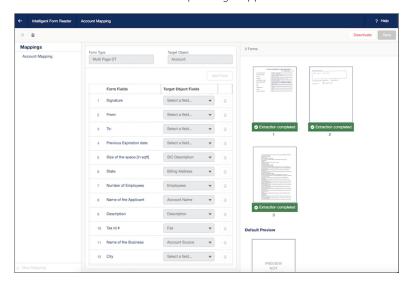
**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

**How:** Identify the fields 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 field names you want to map the Salesforce object fields from the uploaded document.

Here's an example of a mapping to verify a manually uploaded application form. The form reader extracts information from the designated areas and then stores it in the corresponding mapped fields.



# Extract and Verify Information from Uploaded Documents

Avoid time-consuming and error-prone manual data entry with automatic data upload to streamline data upload and verification. Use optical character recognition (OCR) technology to extract fields from documents that your constituents' upload for business license application requests. Using the Intelligent Form Reader's capability, you can create Document Checklist Items to verify the uploaded data

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

**How:** When an applicant submits a license application form it generates a document checklist of the files corresponding to the uploaded attachments. Reviewers can navigate the Document Checklist and click Verify to review the files. Admins or intake officers can review the uploaded files and use the Intelligent Form Reader's OCR to extract the field data.

For example, a business owner can scan and upload a passport to verify their contact information. The intake officer reviews the file and selects a Contact Record template that maps the document information to the Business License Application record fields. The Intelligent Form Reader component recognizes and copies the text information from the uploaded files and stores it in the corresponding fields. A compliance officer can then verify if the contents of the fields from the scanned documents match the information stored in the associated record.

# Use Intelligent Document Automation for Public Sector

Use Intelligent Document Automation to make it easier to map and view incoming documents to application forms and Public Sector objects. To transform a document, a reviewer pulls apart the document to route the pages to where they must go. So, when a reviewer transforms a document, they can choose from document checklist items rather than finding or creating them.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are Intelligent Form Reader with Amazon Textract (1,000 pages) is enabled.

**How:** Create an action plan template based on the document type and then create a selection of document checklist items. When your users receive a document to verify, they can go to the list of document checklist items to attach to it. The next time they receive a similar document, Salesforce automatically creates the same set of document checklist items.

# Inspection Management Enhancements

Help your field inspectors deliver inspections more efficiently by enabling your administrators to define relevant assessment questions that can be answered accurately using integer, decimal, percentage responses. The questions associated with an inspection task can also be predefined logically to help your inspectors perform their visit in the most effective order.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

#### IN THIS SECTION:

#### Generate Assessment Questions to Aid Inspectors

Your inspectors can now view questions specific to the type of inspection being conducted. The questions ensure that your field inspectors don't miss entering relevant data and that they can generate accurate assessments. In addition to text and boolean format, inspection assessment responses can be in date and time, percentage, number, and decimal format. For example, at a fire safety visit, the inspector can enter the number of fire extinguishers present as one of the pass or fail factors.

#### Set Up a Sequence for Inspectors to Follow

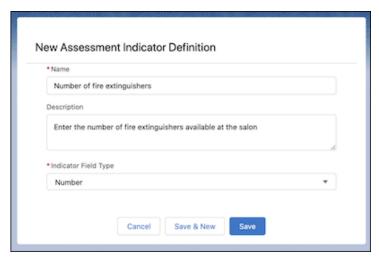
You can define an inspection question sequence for site visits to help your field inspectors be more productive. Direct field inspectors to perform assessments within a task in the order you choose.

# Generate Assessment Questions to Aid Inspectors

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**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

**How:** From the App Launcher, create an assessment indicator definition.



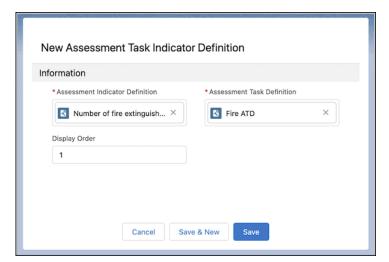
On the Inspection Management Mobile app, start your visit. Choose a task to answer your previously set assessment indicator definitions.

# Set Up a Sequence for Inspectors to Follow

You can define an inspection question sequence for site visits to help your field inspectors be more productive. Direct field inspectors to perform assessments within a task in the order you choose.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Public Sector Solutions are enabled.

**How:** From the App Launcher, when you create an assessment task definition, add the assessment indicator definition and set the display order.



# More Flexible Complaint Tracking on the Public Sector Portal

To help your constituents track public complaint cases submitted by others, configure the site's complaint case pages. When a public complaint is raised on the portal, each department involved can create a case record to track it. For example, the environmental agency and the fire department both can handle a hazardous chemical complaint.

**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 Public Sector site using a person account and view their complaint cases.

# 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 complaint cases with your public complaints

Use the new ComplaintCase object.

# New Fields on the InspectionAssessmentInd Object

#### Add a date and field value as the response for an inspection assessment task

Use the new DateTimeFieldResponse field on the InspectionAssessmentInd object.

#### Add a decimal value as the response for an inspection assessment task

Use the new DecimalFieldResponse field on the InspectionAssessmentInd object.

### Add an integer value as the response for an inspection assessment task

Use the new NumberFieldResponse field on the InspectionAssessmentInd object.

### Add a percentage value as the response for an inspection assessment task

Use the new PercentageFieldResponse field on the InspectionAssessmentInd object.

### View the inspection assessment display sequence

Use the new DisplayOrder field on the InspectionAssessmentInd object.

# Sustainability

With added functionality in Sustainability Cloud, you can filter, analyze, and benchmark energy intensity performance by fuel type across your commercial buildings. And the data gap filling process is updated with two new methods. Added scope 3 value chain analysis now helps you categorize, visualize, and account for your company's scope 3 greenhouse gas emissions, along with new record types, page layouts, and fields for freight hauling, and much more.

For details, see the monthly release notes on the *Trailblazer Community*: Sustainability Cloud or *Partner Community*: Sustainability Cloud. Sustainability is supported in 17 standard languages.

# **Data Processing Engine**

Use Data Processing Engine to learn about a field's hierarchy or its data trends. Upload or download a definition JSON. Delete definitions that you no longer use. Run a definition from the builder, and cancel a run at any time.

### IN THIS SECTION:

#### Find Out a Field's Hierarchy

You can now determine a field's hierarchy path based on its parent field, which provides the direction for the hierarchy path. You can also include the field in the hierarchy. For example, you can use the Hierarchy node to determine the managerial hierarchy of your company's employees.

# Know Your Data Trends with the Compute Relative Transformation

Partition and order data based on specific fields. Create a formula to determine trends for a specific field, and store the results in a custom field.

## Run a Definition Without Navigating Away

Active Data Processing Engine definitions that don't need scheduled runs, or definitions that need a run with specific input variables can now be run from the builder. While testing a definition, it is easier to run it from the builder rather than running using Flows or Apex. Use Monitor Workflow Services to track runs that are initiated from the builder.

### Stop Definitions from Writing Back Results

Data Processing Engine definitions can create, update, or upsert large volumes of records in your Salesforce org. The ability to cancel a run ensures that you avoid undoing changes every time you don't want a run to write back results. Save your org's resources by canceling runs that are in progress for a long time but aren't writing back results. For example, if you start a run by mistake or if you realize that you don't want a definition to write back results in its current configuration, you can cancel it.

### Create or Edit Definitions Locally

Create or edit Data Processing Engine definitions in a medium of your choice. Create a definition locally in a JSON file, and upload it. Or download an existing definition as a JSON file, update it, and upload the updated definition.

#### Delete Definitions You Don't Need

A Salesforce org can contain up to 40 active Data Processing Engine definitions, but you probably don't need all of them. You can delete the definitions that you don't use. You can also delete draft definitions.

### Watch Out for Warnings

We now provide warnings for rules that we relax. For example, you can now save a Data Processing Engine definition even if the only field selected from a source object is the ID field. Previously, if we found issues with it, we didn't allow you to save or activate it.

### Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

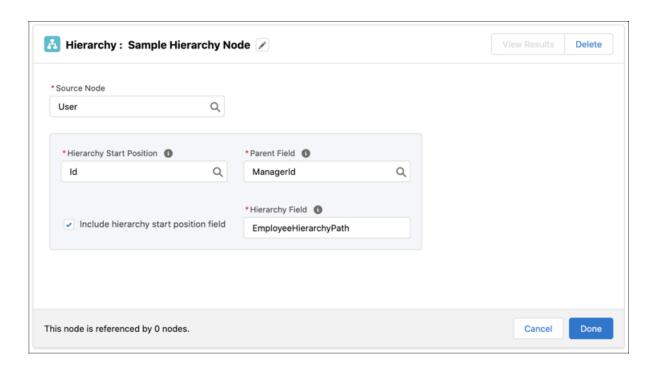
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You can now determine a field's hierarchy path based on its parent field, which provides the direction for the hierarchy path. You can also include the field in the hierarchy. For example, you can use the Hierarchy node to determine the managerial hierarchy of your company's employees.

**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 the Customize Application permissions can create definitions.

**How:** In a Data Processing Engine definition, click **New Node**. Select the node type as **Hierarchy**. Define the node, and save your work. Select the data source node that contains the field that you want to determine the hierarchy path for. In the Hierarchy Start Position field, select the field that you want to determine the hierarchy path for. In the Parent field, select the field that determines the field's hierarchy path. If you want to include the field in the hierarchy path, select **Include hierarchy start position field**. In the Hierarchy field, enter the name for the field that stores the hierarchy path, and click **Done**.



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

# Know Your Data Trends with the Compute Relative Transformation

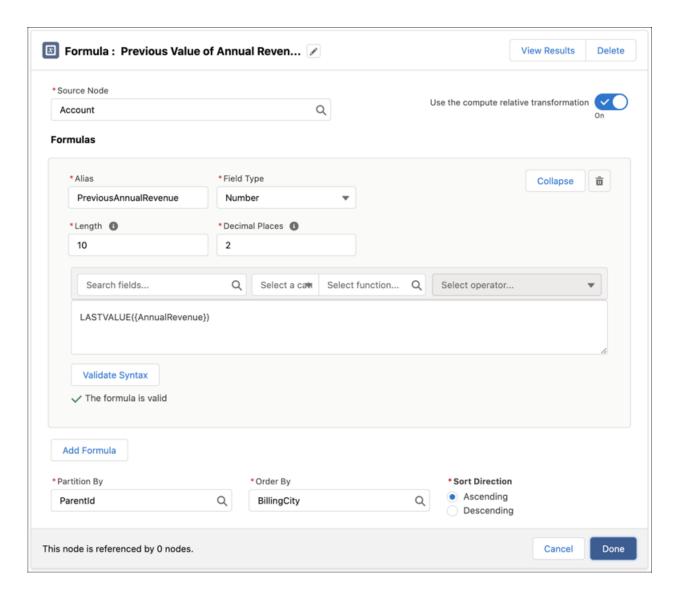
Partition and order data based on specific fields. Create a formula to determine trends for a specific field, and store the results in a custom field.

**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 the Customize Application permissions can create definitions.

**Why:** Let's say a company wants to know the previous annual revenue of accounts. They also want to partition the data by the parent account and order the partitioned data by the billing city. The admin uses the Account object as the data source and partitions the data by the ParentID field. The partitioned data is then ordered by the BillingCity field in descending order. The formula used to determine the previous annual revenue is LASTVALUE({AnnualRevenue}).

**How:** In a Data Processing Engine definition, click **New Node**. Select the node type as **Formula**. Define the node, and save your work. Turn on **Use the compute relative transformation**. In the Formula section, provide an alias for the field that stores transformed value, and select its data type. Define the formula that provides the data trend. Select the field by which to partition and order the data. Then, select the sort direction of the data, and click **Done**.



Salesforce Help: Compute Relative Transformation (can be outdated or unavailable during release preview)

# Run a Definition Without Navigating Away

Active Data Processing Engine definitions that don't need scheduled runs, or definitions that need a run with specific input variables can now be run from the builder. While testing a definition, it is easier to run it from the builder rather than running using Flows or Apex. Use Monitor Workflow Services to track runs that are initiated from the builder.

**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 Data Pipelines Base User permission set can run definitions from the builder.

**Why:** Let's say a company wants to reward their sales reps with a bonus after a tough 2020. The bonus is based on the size and the number of deals closed during the year. The admin creates a definition to write back the bonus amount to a custom object. The definition has two input variables to filter: deals that were created and closed in 2020. Because it's a one-off bonus, the admin runs the definition from the builder with the input variable values as January 1, 2020 and December 31, 2020.

**How:** From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**. Open an active definition that you want to run, and click **Run Definition**. On the Run Data Processing Engine Definition window, click **Next**. Specify the input variable values this run must use, and click **Run Definition**.

SEE ALSO:

Salesforce Help: Run a Data Processing Engine Definition from the Builder (can be outdated or unavailable during release preview)

# Stop Definitions from Writing Back Results

Data Processing Engine definitions can create, update, or upsert large volumes of records in your Salesforce org. The ability to cancel a run ensures that you avoid undoing changes every time you don't want a run to write back results. Save your org's resources by canceling runs that are in progress for a long time but aren't writing back results. For example, if you start a run by mistake or if you realize that you don't want a definition to write back results in its current configuration, you can cancel it.

**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 System Administrator profile can cancel a Data Processing Engine run.

**How:** From Setup, in the Quick Find box, enter *Monitor Workflow Services*, and then select **Monitor Workflow Services**. Open the Data Processing Engine definition run that you want to cancel, and click **Cancel Run**.

SEE ALSO:

Salesforce Help: Cancel a Data Processing Engine Definition's Run (can be outdated or unavailable during release preview)

Industries Common Resources Developer Guide: Batch Job Cancel Business API (can be outdated or unavailable during release preview)

# Create or Edit Definitions Locally

Create or edit Data Processing Engine definitions in a medium of your choice. Create a definition locally in a JSON file, and upload it. Or download an existing definition as a JSON file, update it, and upload the updated definition.

**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 the Customize Application permissions can upload or download definitions.

**How:** From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**. To upload the JSON for a new definition, click **New**. Name the definition, specify the process type, and click **Create**. Click . Upload the JSON file, and click **Upload**. To download a definition, click .

SEE ALSO:

Salesforce Help: Create or Edit a Data Processing Engine Definition in a JSON File (can be outdated or unavailable during release preview)

# Delete Definitions You Don't Need

A Salesforce org can contain up to 40 active Data Processing Engine definitions, but you probably don't need all of them. You can delete the definitions that you don't use. You can also delete draft definitions.

**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 the Customize Application permissions can delete definitions.

**How:** Before you delete a definition, ensure that the definition isn't associated with a flow. From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**. Open the definition that you want to delete, and click **Deactivate** > **Delete**.

SEE ALSO:

Salesforce Help: Delete a Data Processing Engine Definition (can be outdated or unavailable during release preview)

# Watch Out for Warnings

We now provide warnings for rules that we relax. For example, you can now save a Data Processing Engine definition even if the only field selected from a source object is the ID field. Previously, if we found issues with it, we didn't allow you to save or activate it.

**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.

# Limited Availability for Data Processing Engine

Data Processing Engine isn't available in Government Cloud and Government Cloud Plus.

**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.

**When:** This also applies to the Spring '21 release. We'll let you know when Data Processing Engine is available in Government Cloud and Government Cloud Plus.

# **Decision Table**

Define a condition that drives the input field logic to provide outcomes. Get data from multiple source objects in a dataset link.

#### IN THIS SECTION:

### Deliver Outcomes Based on Custom Logic

Select a condition to ensure that a decision table provides outcomes when the condition is met. The condition drives the custom logic that evaluates the business rules. You have the flexibility to choose between AND, OR, and a custom condition.

#### Provide Outcomes Based on Data from Multiple Sources

Business scenarios can require outcomes based on data from multiple objects. In a dataset link, map the decision table input fields to fields of different source objects. To provide an outcome, the decision table evaluates the business rules against the values of the selected fields of different source objects.

### Grant More Access to Experience Cloud Users

Experience Cloud users can invoke decision tables. You can enable the Run Decision Tables user permission for specific Experience Cloud profiles.

# Transition from the Epoch Time Format

Enter values for Date type input fields in YYYY/MM/DD or YYYY-MM-DD format when using an invocable action to run a decision table. It's no longer necessary to convert the time into Epoch format and then enter it.

### New Fields in Decision Table

Do more with the new Decision Table fields.

New Setup Object Fields in Decision Table

Use Tooling APIs to work with the new Decision Table setup object fields.

Connect REST API

Decision Table REST API includes enhanced calls.

# Deliver Outcomes Based on Custom Logic

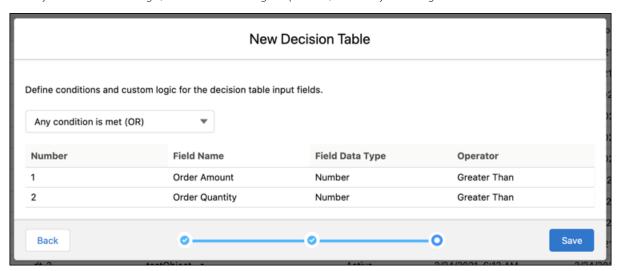
Select a condition to ensure that a decision table provides outcomes when the condition is met. The condition drives the custom logic that evaluates the business rules. You have the flexibility to choose between AND, OR, and a custom condition.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

**Who:** Users assigned the System Administrator profile can create decision tables.

**Why:** Let's say a retailer runs provides a discount when either the order quantity (1) is above 30 or the order amount (2) is more than \$10,000. The discount rules are stored in the Order Discount custom object. The decision table uses the OR condition and the condition logic expression is 1 OR 2.

**How:** From Setup, in the Quick Find box, enter <code>Decision Table</code>, and then select **Decision Table**. Click **New**. Define the decision table, and click **Next**. Select the input fields, their operators, and an output field. Click **Next**. Select a condition in the Input Fields Condition field. If you select Custom Logic, enter the custom logic expression, and save your changes.



SEE ALSO:

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

# Provide Outcomes Based on Data from Multiple Sources

Business scenarios can require outcomes based on data from multiple objects. In a dataset link, map the decision table input fields to fields of different source objects. To provide an outcome, the decision table evaluates the business rules against the values of the selected fields of different source objects.

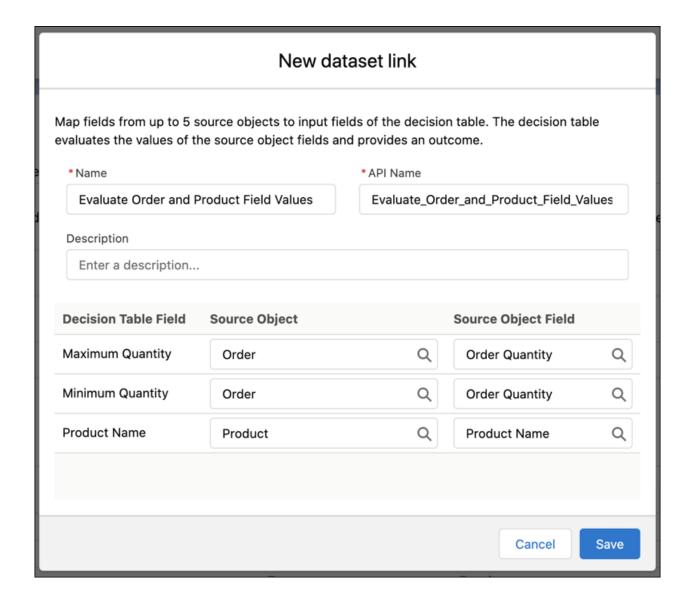
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

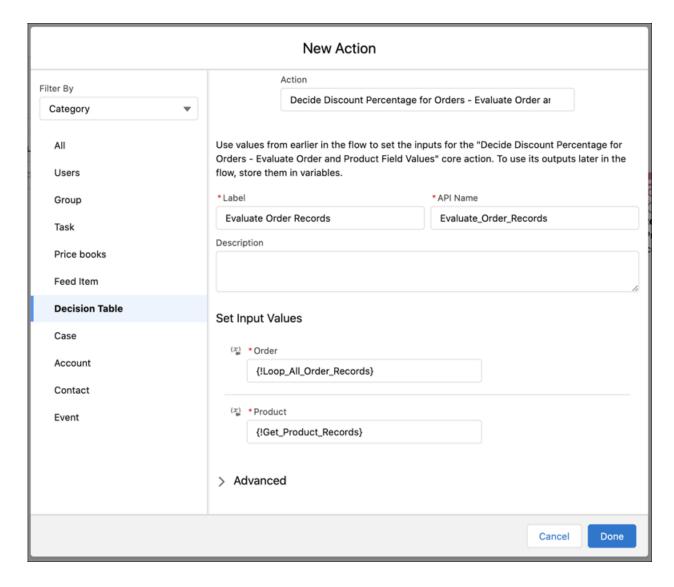
Who: Users assigned the System Administrator profile can create dataset links in a decision table.

**Why:** Let's say a company wants to automate the process of deciding discounts based on the product purchased and the order quantity. The product name is stored in the Name field of the Product object and the order quantity is stored in the Order Quantity field of the Order object. The business rules are stored in the Order Discount custom object, and it has these fields: Product Name, Order Amount, and Discount. The decision table uses Product Name field and Order Amount field as input fields, and it uses the Discount field as the output field. In the dataset link, the Name field of the Product object is mapped to the Product Name input field. The Order Quantity field of the Order object is mapped to the Order Amount input field.

**How:** Open the decision table that you want to add a dataset link to. On the Dataset Link card, click **New**. Enter the details of the dataset link. Map the decision table input fields to the fields of the different source objects, and save your changes.

When invoking a decision table with a dataset link, specify which records of each source object must be evaluated. The decision table evaluates the values stored in the selected fields of the source object records.





Salesforce Help: Add Dataset Links to a Decision Table (can be outdated or unavailable during release preview)

# Grant More Access to Experience Cloud Users

Experience Cloud users can invoke decision tables. You can enable the Run Decision Tables user permission for specific Experience Cloud profiles.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

**How:** You can enable the Run Decision Tables user permission for these profiles:

- Partner Community User
- Partner Community Login User
- Customer Community Plus User
- Customer Community Plus Login User

- Customer Community User
- Customer Community Login User
- Channel Account User

Salesforce Help: User Permissions for Decision Tables (can be outdated or unavailable during release preview)

# Transition from the Epoch Time Format

Enter values for Date type input fields in YYYY/MM/DD or YYYY-MM-DD format when using an invocable action to run a decision table. It's no longer necessary to convert the time into Epoch format and then enter it.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Developers who run decision tables using the Decision Table action.

SEE ALSO:

Industries Common Resources Developer Guide: Decision Table Actions (can be outdated or unavailable during release preview)

# New Fields in Decision Table

Do more with the new Decision Table fields.

## Specify decision table input field processing conditions and criteria

Use the new ConditionCriteria and ConditionType fields on the existing DecisionTable object.

#### Specify the decision table input field processing sequence

Use the new Sequence field on the existing Decision Table Parameter object.

### Specify unique source objects for each decision table input field in a dataset link

Use the new DatasetSourceObject field on the existing DecisionTblDatasetParameter object.

# New Setup Object Fields in Decision Table

Use Tooling APIs to work with the new Decision Table setup object fields.

# Specify decision table input field processing conditions and criteria

Use the new ConditionCriteria and ConditionType fields on the existing DecisionTable object.

### Specify the decision table input field processing sequence

Use the new Sequence field on the existing DecisionTableParameter object.

### Specify unique source objects for each decision table input field in a dataset link

Use the new DatasetSourceObject field on the existing DecisionTblDatasetParameter object.

## Connect REST API

Decision Table REST API includes enhanced calls.

## **Decision Table**

### Support multiple source objects in a dataset link definition

Make a POST request to the /connect/decision-table/**decisionTableId** resource with the new sourceObject property in the Decision Table Input request body.

# **Batch Management**

Cancel Batch Management jobs at any time. Resubmit records that failed in a previous batch job run.

#### IN THIS SECTION:

#### Cancel a Run with a Click

Now if batch job parts fail during a run or there's a configuration error, you can cancel the run midstream and correct the errors in the Batch Management job or the associated flow. Because Batch Management can process thousands of records in a single run, the option to cancel acts as a safety net. And changes aren't reverted if you cancel a Batch Management job after some batch job parts successfully processed records.

#### Resubmit Failed Records Easily

Sometimes Batch Management jobs fail to process records during a run. After a Batch Management job run is complete, you can resubmit all failed records or specific failed records. A new batch job automatically runs to process them. Previously, you waited for the next scheduled run or manually ran the job again to process the failed records.

### Process Records in Larger Batches

Batch job parts can now process up to 2,000 records rather than 200. The new limit reduces the number of batch job parts required to process records, which reduces the resources and calls required to run a Batch Management job.

#### New Fields in Batch Management

Do more with the new Batch Management fields.

# New Invocable Action in Batch Management

Run Batch Management jobs using an invocable action.

### New Action Type Value in Batch Management

Batch Management has a new actionType enumeration value.

#### Connect REST API

Common Business REST API includes enhanced calls.

### New Fields in Batch Management Platform Event

Use a Platform Event to notify your subscribed users when Batch Management job runs in a flow are complete.

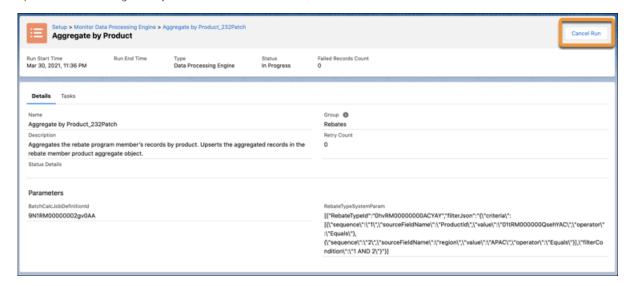
# Cancel a Run with a Click

Now if batch job parts fail during a run or there's a configuration error, you can cancel the run midstream and correct the errors in the Batch Management job or the associated flow. Because Batch Management can process thousands of records in a single run, the option to cancel acts as a safety net. And changes aren't reverted if you cancel a Batch Management job after some batch job parts successfully processed records.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the System Administrator profile can cancel a Batch Management job run.

**How:** From Setup, in the Quick Find box, enter *Monitor Workflow Services*, and then select **Monitor Workflow Services**. Open the Batch Management job run that must be canceled, and click **Cancel Run**.



#### SEE ALSO:

Salesforce Help: Cancel a Batch Job Run (can be outdated or unavailable during release preview)

Industries Common Resources Developer Guide: Batch Job Cancel Business API (can be outdated or unavailable during release preview)

# Resubmit Failed Records Easily

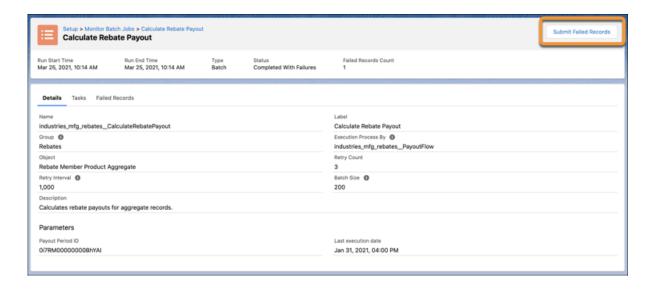
Sometimes Batch Management jobs fail to process records during a run. After a Batch Management job run is complete, you can resubmit all failed records or specific failed records. A new batch job automatically runs to process them. Previously, you waited for the next scheduled run or manually ran the job again to process the failed records.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the System Administrator profile can resubmit failed records in Monitor Workflow Services.

**How:** You can resubmit failed records in two ways.

- From Setup, in the Quick Find box, enter Monitor Workflow Services, and then select Monitor Workflow Services.
   Open the Batch Management job run that contains failed records. Click Submit Failed Records to submit all the failed records for processing. To submit specific failed records, navigate to the Failed Records tab, select the failed records you want to submit, and click Submit Failed Records.
- In a flow, drag the Action element on to the canvas. Select the Category as Batch Job. Search and select Submit Failed Records. Specify the ID of the batch job that contains the failed records. If you want to submit specific failed records, specify the failed record IDs.



Salesforce Help: Submit Failed Records (can be outdated or unavailable during release preview)

Salesforce Help: Submit Failed Records in Flows (can be outdated or unavailable during release preview)

Industries Common Resources Developer Guide: Submit Failed Records Batch Job Invocable Action (can be outdated or unavailable during release preview)

### **Process Records in Larger Batches**

Batch job parts can now process up to 2,000 records rather than 200. The new limit reduces the number of batch job parts required to process records, which reduces the resources and calls required to run a Batch Management job.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Who: Users with the System Administrator profile can create Batch Management jobs.

# New Fields in Batch Management

Do more with the new Batch Management fields.

#### View the status of a failed record

Use the new Status field on the existing BatchJobPartFailedRecord object.

### View of the ID of the batch job used to submit failed records.

Use the new ResubmittedBatchJobId field on the existing BatchJobPartFailedRecord object.

# New Invocable Action in Batch Management

Run Batch Management jobs using an invocable action.

### **Submit Failed Records Batch Job**

Use the new submitFailedRecordsBatchJob standard action to resubmit an existing batch job with failed records for processing.

### New Action Type Value in Batch Management

Batch Management has a new actionType enumeration value.

### Use the Batch Management job action with Flows to resubmit an existing batch job with failed records for processing

Use the new submitFailedRecordsBatchJob enumeration value on the actionType field on the FlowActionCall subtype of the Flow metadata type.

### Connect REST API

Common Business REST API includes enhanced calls.

### Batch Management and Data Processing Engine

### Cancel a batch job

Make a POST request to the new /connect/batch-job/batchJobId/cancel-job resource.

### New Fields in Batch Management Platform Event

Use a Platform Event to notify your subscribed users when Batch Management job runs in a flow are complete.

### View the published event

Use the new EventUuid field on the existing Platform Event.

# Einstein Relationship Insights

Discover critical relationships between people and companies and identify prospective customers and business opportunities by exploring disparate data sources. Extract insights from unstructured data on web pages and transform them into structured information such as Salesforce records. Use these insights to prioritize contacts and accounts, enrich leads, and increase your sales team's productivity. Build a network of people and companies that are relevant to your research and close deals faster.

#### IN THIS SECTION:

### Get Actionable Insights for a Record with Einstein Relationship Insights

Use Einstein Relationship Insights to see recommended relationships for a record of interest. You can also see documents from the web that mention the record and the recommended relationship. You can create records for valid recommendations and dismiss invalid recommendations.

### Explore More Object Relationships with Additional Person Record Objects

You can add an object in the Additional Person Record Object field when you set up Einstein Relationship Insights. Your users can then add a person record type when they create records. They can account and contact object information in a single object such as leads. Then they can convert the leads to the correct account type.

### Improve Data Quality by Selecting the Correct Record

Select the most accurate records among similar records in your database. With accurate records, Einstein provides better recommendations.

#### Get Relationship Insights from Web Pages with Browser Extension

With the Salesforce Einstein Relationship Insights browser extension, you can see existing and recommended records. View existing records highlighted in blue and recommended records that aren't yet in Salesforce CRM highlighted in red. You can create new records for those in red.

### View Relationship Insights in Actionable Relationship Center

Integrate Einstein Relationship Insights with Actionable Relationship Center (ARC) to see the recommended relationships for records and their related articles on the ARC detail panel. From the recommendations, you can create an account or a person record and select an Account-Contact or Contact-Contact relationship for the records. You can also dismiss any invalid or inappropriate recommendations.

### Einstein Relationship Insights Is Compliant with Data Privacy Requirements

When you explore an active, people, or company record, any changes to these records are processed with 99.9% accuracy.

### Get Actionable Insights for a Record with Einstein Relationship Insights

Use Einstein Relationship Insights to see recommended relationships for a record of interest. You can also see documents from the web that mention the record and the recommended relationship. You can create records for valid recommendations and dismiss invalid recommendations.

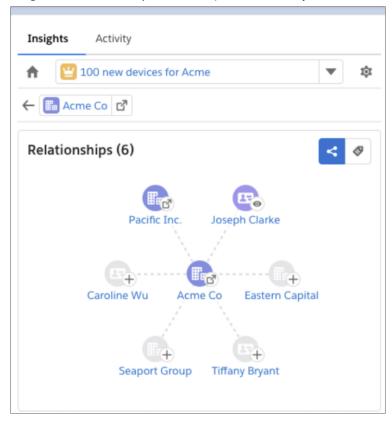
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**Who:** Users need the Einstein Relationship Insights Growth license to view relationship recommendations for records of active record, account, and contact objects. With the Einstein Relationship Insights Starter license, users can view recommendations for records of account and contact objects.

**How:** From Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Relationship Intelligence**. Enable **Einstein Relationship Insights**.



Navigate to the record that you want to explore, and click **Explore with Einstein**.



### SEE ALSO:

Salesforce Help: Explore an Opportunity for Einstein Relationship Insights Growth

Salesforce Help: Explore Relationships for Einstein Relationship Insights Starter

Salesforce Help: Explore Account or Contact for Einstein Relationship Insights Growth

# Explore More Object Relationships with Additional Person Record Objects

You can add an object in the Additional Person Record Object field when you set up Einstein Relationship Insights. Your users can then add a person record type when they create records. They can account and contact object information in a single object such as leads. Then they can convert the leads to the correct account type.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**How:** From Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Relationship Intelligence**. From the Additional Person Record Object list, select an object. From the Additional Person Record Type field, you can select an associated record type.

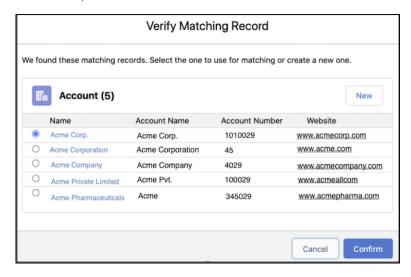


### Improve Data Quality by Selecting the Correct Record

Select the most accurate records among similar records in your database. With accurate records, Einstein provides better recommendations.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**How:** For an existing record in Salesforce, click o to view the matching records. In the Confirm Matching Record window, select the correct record, or create one if there are no accurate matches.



SEE ALSO:

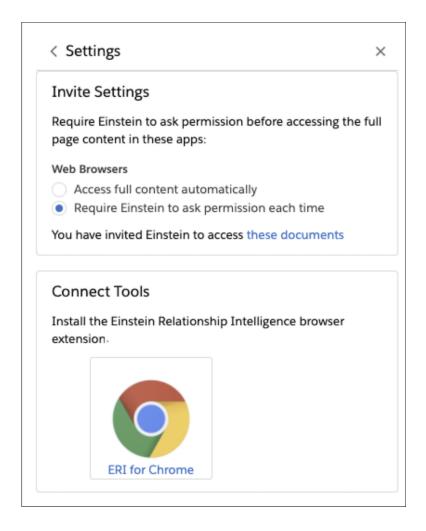
Salesforce Help: View Matched Records

# Get Relationship Insights from Web Pages with Browser Extension

With the Salesforce Einstein Relationship Insights browser extension, you can see existing and recommended records. View existing records highlighted in blue and recommended records that aren't yet in Salesforce CRM highlighted in red. You can create new records for those in red.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled. Install the browser extension to enable this feature.

**How:** From the Einstein Relationship Insights settings page, select an extension for your browser.



Salesforce Help: Einstein Relationship Insights Browser Extension

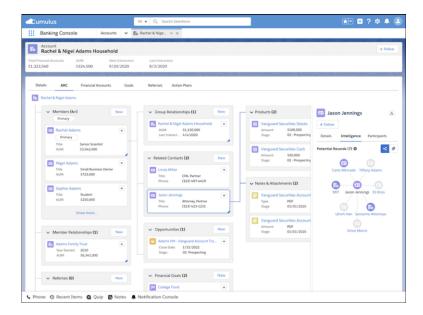
# View Relationship Insights in Actionable Relationship Center

Integrate Einstein Relationship Insights with Actionable Relationship Center (ARC) to see the recommended relationships for records and their related articles on the ARC detail panel. From the recommendations, you can create an account or a person record and select an Account-Contact or Contact-Contact relationship for the records. You can also dismiss any invalid or inappropriate recommendations.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

How: In Lightning App Builder, select the ARC - Financial Services Cloud component, and enable Show Insights.

The Einstein Relationship Insights tab shows potentially related records for the selected record. To see relevant articles from trusted sources, click a record.



Salesforce Help: Set Up Actionable Relationship Center with Einstein Relationship Insights

### Einstein Relationship Insights Is Compliant with Data Privacy Requirements

When you explore an active, people, or company record, any changes to these records are processed with 99.9% accuracy.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

# Intelligent Form Reader

Extract and store information from an external form into a Salesforce object using Intelligent Form Reader Metadata APIs and setup objects.

### IN THIS SECTION:

Intelligent Form Reader Has New Metadata Types

Intelligent Form Reader has new metadata types.

Intelligent Form Reader Has New Tooling API Objects

Use Tooling APIs to work with the Intelligent Form Reader setup objects.

### Intelligent Form Reader Has New Metadata Types

Intelligent Form Reader has new metadata types.

Extract and map information from a form using a document type

Use the new OcrSampleDocument metadata type.

Map a form and a Salesforce object using Intelligent Form Reader

Use the new OcrTemplate metadata type.

### Intelligent Form Reader Has New Tooling API Objects

Use Tooling APIs to work with the Intelligent Form Reader setup objects.

### Store information about the mapping between a form and a Salesforce object

Use the OcrTemplate object.

### Store information about the Salesforce object into which information from a form is extracted and mapped

Use the OcrTargetObject object.

### Store information about the form field whose value is extracted and mapped to a Salesforce object

Use the OcrSampleDocumentField object.

### Store information about how data from a form field is mapped to fields in a Salesforce object

Use the OcrTargetObjFieldMapping object.

#### Store information about the fields that define a page in the OCR sample document

Use the OcrSampleDocumentPage object.

### Store information about the document type that's used as a reference while mapping information from a form

Use the OcrSampleDocument object.

### Store information about the relationship between an OCR template and an OCR sample document

Use the OcrTemplateSampleDocument object.

# Tap Into Common Industries Developer Resources

Some Industries clouds have components, such as objects, invocable actions, APIs, and events, that can be useful for two or more clouds. We've built a central place where you can learn about these multi-purpose components and how to put them to work automating processes for your vertical.

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

**How:** Hop over to the Industries Common Resources Developer Guide on Salesforce Developers.

# 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

# Mobile

Get more done in the Salesforce mobile app with new features like Mobile Home for Android. Mobile Publisher for Experience Cloud lets admins configure how URLs open in the Experience Cloud app, and customize menu items to help users navigate the app.

### IN THIS SECTION:

### Salesforce Mobile App

View customizable cards on the Mobile Home page for Android, filter records using natural language search on mobile, and view Lightning record pages in full-width on tablets (pilot).

#### Mobile Publisher for Experience Cloud

Configure and manage how URLs open in the Experience Cloud app and customize the type and order of menu items to help users navigate within the app.

# Salesforce Mobile App

View customizable cards on the Mobile Home page for Android, filter records using natural language search on mobile, and view Lightning record pages in full-width on tablets (pilot).

### IN THIS SECTION:

### Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

# Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of June 14, 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	✓	✓	
Data Access and Views			
Settle in to Mobile Home for Android (Beta)	✓	✓	✓
Search			
Search Smarter on Mobile with Einstein Search (Generally Available)	✓	✓	✓
Access and Security			
Enhanced Mobile Security Setup UI (Generally Available)			~
Miscellaneous Enhancements			
See the Full Picture on Tablets (Pilot)	~	<b>✓</b>	

### 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 Summer '21.

Platform	Phones	Tablets
Android	Google Pixel 4 XL	
	• Google Pixel 3	
	<ul><li>Samsung Galaxy S10 / S10+ / S10e</li></ul>	
	<ul> <li>Samsung Galaxy S9 / S9+</li> </ul>	
	<ul> <li>Samsung Galaxy S8 / S8+</li> </ul>	
	Samsung Galaxy S7	
	<ul> <li>Samsung Galaxy Note 10+</li> </ul>	
	Samsung Galaxy Note 9	
	• Samsung Galaxy Note 8	
iOS	• iPhone 12 Pro / Pro Max / mini	• iPad Pro 10.5"
	• iPhone 12	• iPad Air 2
	• iPhone 11 Pro / Pro Max	• iPad Mini 4
	• iPhone 11	
	• iPhone XR	
	• iPhone XS / XS Max	
	• iPhone X	
	• iPhone 8 / 8 Plus	
	• iPhone 7 / 7 Plus	
	• iPhone SE	
	• iPhone 6S	

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce isn't always able to 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.

### Settle in to Mobile Home for Android (Beta)

Your favorite new feature for iOS is now available on Android. 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 users.

Where: This change applies to the Salesforce mobile app for Android in all editions, except Database.com.

**How:** To turn Mobile Home on for your Android 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 Android 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 (Beta) (can be outdated or unavailable during release preview)

### Search Smarter on Mobile with Einstein Search (Generally Available)

Einstein Search is now generally available in the Salesforce mobile app. Personalization gives your users relevant search results based on their activity. Natural language search (NLS) lets users type common words and phrases in their queries to filter search results.

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

SEE ALSO:

Einstein Search (Generally Available)

### Enhanced Mobile Security Setup UI (Generally Available)

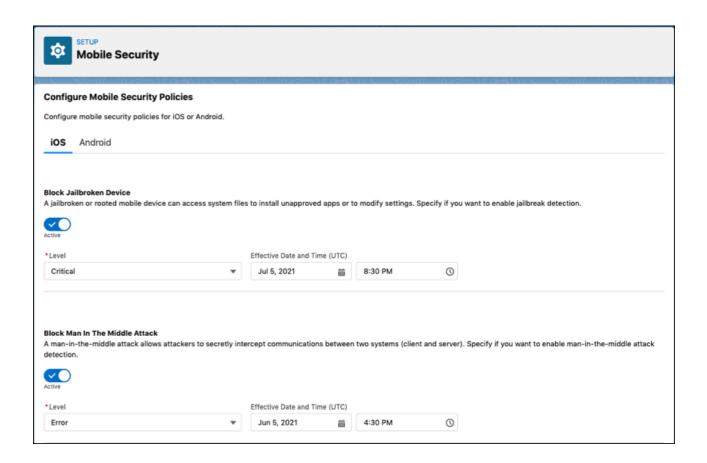
Enabling and configuring mobile security policies is as easy as toggling a switch. Previously you had to configure a connected app attribute for each mobile security policy that you wanted to enable.

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.

**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.

If you already have mobile security policies configured via connected app attributes, you can migrate your existing security policies to the new Setup UI.



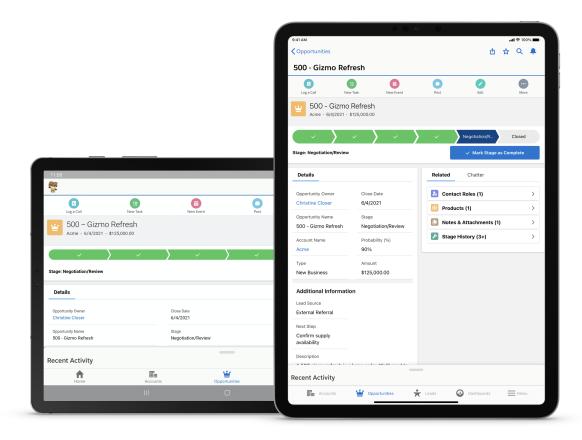
Salesforce Help: Enable and Configure Mobile App Security Policies (can be outdated or unavailable during release preview)

### See the Full Picture on Tablets (Pilot)

A full-width view of Lightning on tablet is here! This experience uses the tablet's full screen to display desktop record layouts with mobile optimized components. It supports Lightning apps, full-width Lightning record pages, Lightning navigation, and Tableau CRM.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

**How:** To turn on the full-width Lightning on tablet experience, from Setup, in the Quick Find box enter *Quickstart*, and then select **New Salesforce Mobile App Quickstart**. Under Tablet Preferences, select **Lightning on tablet: full-width (pilot)**.



The full-width tablet experience is offered as a part of an opt-in pilot, and has some known limitations. See Salesforce Mobile App Considerations for Tablets.



**Note:** We provide Lightning on tablet: full-width to customers through a pilot program that requires agreement to specific terms and conditions. Lightning on tablet: full-width 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 Lightning on tablet: full-width in the Lightning on Mobile Trailblazer Community or the Salesforce for iOS/Android Trailblazer Community.

#### SEE ALSO:

Salesforce Help: Salesforce Mobile App Considerations for Tablets (can be outdated or unavailable during release preview)

# Mobile Publisher for Experience Cloud

Configure and manage how URLs open in the Experience Cloud app and customize the type and order of menu items to help users navigate within the app.

### IN THIS SECTION:

### Configure the Navigation Tab Bar (Generally Available)

The navigation tab bar shows tabs across the bottom of the screen of your branded Experience Cloud app. You can customize the type and order of navigation tab bar menu items with the Experience Builder.

### Manage How URLs Open in the Experience Cloud App (Generally Available)

URL Management lets you configure how URLs open in the Experience Cloud app.

# Configure the Navigation Tab Bar (Generally Available)

The navigation tab bar shows tabs across the bottom of the screen of your branded Experience Cloud app. You can customize the type and order of navigation tab bar menu items with the Experience Builder.

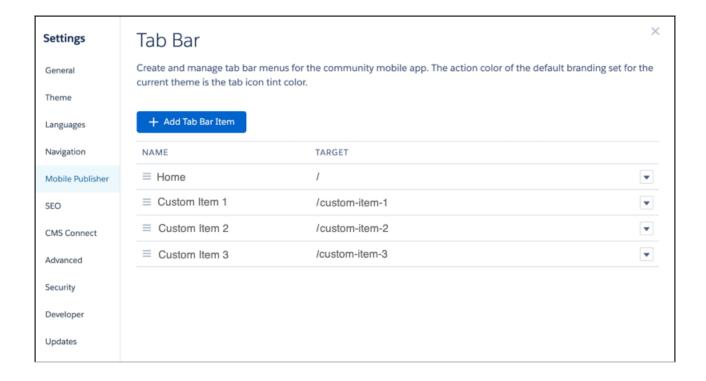
**Where:** This change applies to Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions.

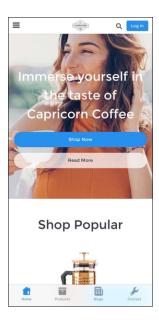
Who: To customize the navigation tab bar, users need a Mobile Publisher license, and have Experience Cloud site access.

**How:** Use the Experience Builder to customize the navigation tab bar for your users.

To access the Experience Builder:

- From the global header menu in Experience Workspaces or Experience Management, click Experience Workspaces | Builder or
  Experience Management | Go to Experience Builder.
- From the All Sites page in Setup, click **Builder** next to the site name.
- From a site, click Experience Builder in the profile menu.





Salesforce Help: Navigate Experience Builder

Salesforce Help: Configure the Mobile Publisher Navigation Tab Bar (can be outdated or unavailable during release preview)

### Manage How URLs Open in the Experience Cloud App (Generally Available)

URL Management lets you configure how URLs open in the Experience Cloud app.

**Where:** This change applies to Experience Cloud sites accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions.

Who: To manage URLs, users need a Mobile Publisher license, and have Experience Cloud site access.

**How:** With URL Management, you can define how URLs open:

- Webview URLs: Open inside the Experience Cloud app as a webview.
- In-App Browser URLs: Open inside the Experience Cloud app using an in-app browser.
- External Browser URLs: Open outside the Experience Cloud app using the default external browser.



Salesforce Help: Manage How URLs Open in the Experience Cloud App (can be outdated or unavailable during release preview)

# myTrailhead

Create modules and trails with confidence and ease: Trailmaker Content saves your changes to the cloud and lets you upload files for your badge and trail art. Customize the role and level filters on myTrailhead to reflect your company's content and business needs. Salesforce Identity for myTrailhead users can access myTrailhead and public Salesforce Trailhead from the same login and create trailmixes with content from both sites.

### IN THIS SECTION:

### Trailmaker Content Has Your Back

Whether you're creating content, formatting it, or updating it, Trailmaker Content saves your changes to the cloud every few seconds and shows when your work was last saved. You can even start working on one computer or browser and continue using another. If your computer crashes or you clear your browser cache, the content in your workspace stays in your workspace—right where you need it.

### Add Badge and Trail Art to Your Content with a Simple Image Upload

Adding module badge art and trail icons is smoother and easier for Trailmaker Content users. Now you can upload the image file right from your server or hard drive.

### Motivate Your Trailblazers with the Today Page

Give your myTrailhead users an extra boost to learn, achieve their stretch goals, and complete their assignments. The new Today page offers more information about a user's progress and achievements from a single view. Your users can efficiently review their assignments, in-progress modules, and favorite content, or dive into something new.

### Add and Delete Custom Role and Level Filters on myTrailhead

Filters help your myTrailhead users quickly find content that's relevant to them. For example, filters for Sales Rep and Service Agent can direct users to the modules and trails essential to those professional roles. Filters such as Beginner, Intermediate, and Advanced help users choose modules and trails that match their level of knowledge and experience. You can customize the role and level filters on myTrailhead to suit your company's needs.

### See myTrailhead and Salesforce Trailhead Content via the Same Login with Salesforce Identity for myTrailhead

Salesforce Identity for myTrailhead users already benefit from one-click access to myTrailhead. Now they can enjoy one-click access to public Salesforce Trailhead from the same login. Whether your users are on Learning Paths in Lightning Experience or your company's myTrailhead site, myTrailhead and Salesforce Trailhead content is within easy reach.

### Simplify Metadata for myTrailhead Trails and Modules

Spend more time collaborating and writing excellent learning content, and worry less about tagging all your content consistently. The Tags category for myTrailhead content filters now applies only to units, and is no longer available for trails and modules. This change simplifies how content producers prepare and categorize information, and it removes noise for learners who view and search for that content.

### Trailmaker Content Has Your Back

Whether you're creating content, formatting it, or updating it, Trailmaker Content saves your changes to the cloud every few seconds and shows when your work was last saved. You can even start working on one computer or browser and continue using another. If your computer crashes or you clear your browser cache, the content in your workspace stays in your workspace—right where you need it.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

**Who:** Users with the myTrailhead Content Access and myTrailhead Content Creation permissions can log in to their company's myTrailhead site and access Trailmaker Content.

**Why:** Trailmaker saves only the most recent version of your changes. If you work on multiple computers or browsers, download the content in your workspace to keep a backup copy before you open Trailmaker Content in a second window.

SEE ALSO:

Salesforce Help: Use Trailmaker to Create Content (can be outdated or unavailable during release preview)

# Add Badge and Trail Art to Your Content with a Simple Image Upload

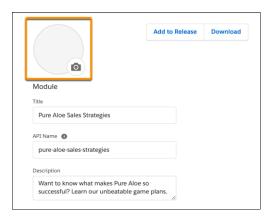
Adding module badge art and trail icons is smoother and easier for Trailmaker Content users. Now you can upload the image file right from your server or hard drive.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

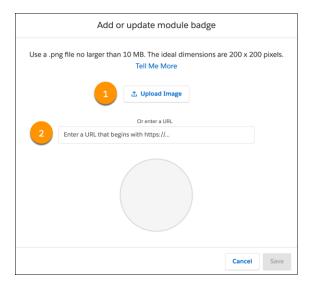
**Who:** Users with the myTrailhead Content Access and myTrailhead Content Creation permissions can log in to their company's myTrailhead site and access Trailmaker Content.

**Why:** This change doesn't affect badge and trail art that's already posted online. And you can still post badge and trail art online and add it to content by entering the URL. The choice is yours.

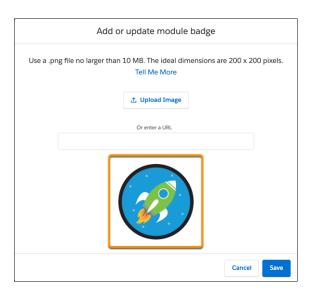
**How:** On a module page in Trailmaker Content, click in the badge field.



- To upload an image file, click **Upload Image** (1) and navigate to the file.
- To add the badge art via URL, enter a URL that begins with https:// (2).



Either way, after you add the art, a preview of the image appears in the window.



Save your change.

To add trail art, the process is the same. On a trail page in Trailmaker Content, click in the trail icon field, and follow the same steps.

### SEE ALSO:

Salesforce Help: Create a Module in Trailmaker Content (can be outdated or unavailable during release preview)

Salesforce Help: Create a Trail in Trailmaker Content (can be outdated or unavailable during release preview)

Salesforce Help: Create Badge and Trail Art (can be outdated or unavailable during release preview)

# Motivate Your Trailblazers with the Today Page

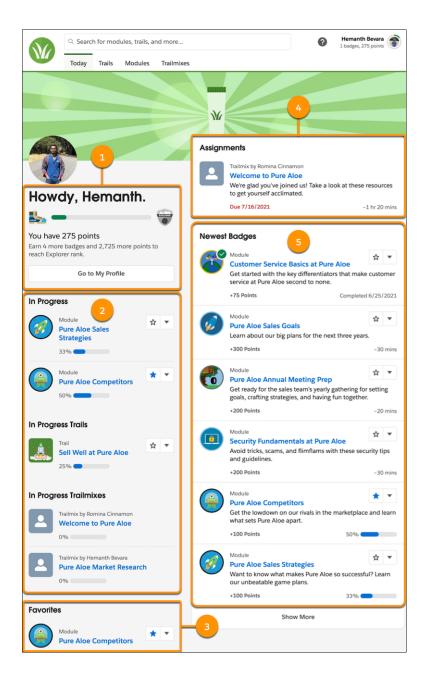
Give your myTrailhead users an extra boost to learn, achieve their stretch goals, and complete their assignments. The new Today page offers more information about a user's progress and achievements from a single view. Your users can efficiently review their assignments, in-progress modules, and favorite content, or dive into something new.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

When: The Today page is available in June 2021.

**Who:** Users with the myTrailhead Content Access permission can see the Today page.

**How:** The Today page appears when a user logs in to their company's myTrailhead subdomain. Information shown can differ depending on the authentication provider that you configure for your myTrailhead subdomain.



- A progress indicator shows a user's points and status toward achieving the next rank on their profile (1).
  - Note: The progress indicator is available only for subdomains that configured Trailblazer.me as their authentication provider. If your subdomain has configured Salesforce Identity for myTrailhead as its authentication provider, the progress indicator isn't available.
- Up to three in-progress modules, three in-progress trails, and three in-progress trailmixes (2).
- Up to three favorites (3).
- Up to three trailmixes assigned from the Trail Tracker app (4).
- Up to six of the newest modules (5).

The Today page doesn't show any modules in preview mode. To view modules in preview mode, click the Modules tab, and view the complete list of available modules.

SEE ALSO:

Salesforce Help: Find Content on myTrailhead Salesforce Help: Install the Trail Tracker App

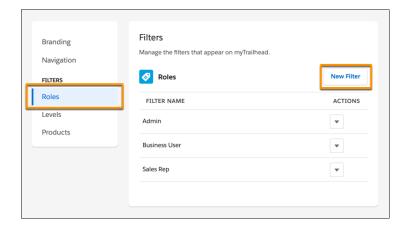
# Add and Delete Custom Role and Level Filters on myTrailhead

Filters help your myTrailhead users quickly find content that's relevant to them. For example, filters for Sales Rep and Service Agent can direct users to the modules and trails essential to those professional roles. Filters such as Beginner, Intermediate, and Advanced help users choose modules and trails that match their level of knowledge and experience. You can customize the role and level filters on myTrailhead to suit your company's needs.

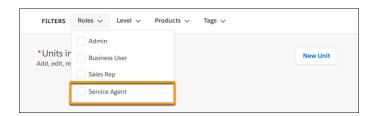
Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

**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. Users with the myTrailhead Content Creation permission can assign filters to—or delete them from—modules and trails. Users with the myTrailhead Release Management permission can create and publish releases. Users with the myTrailhead Content Creation and myTrailhead Release Management permissions can upload modules and trails from Trailmaker Content to Trailmaker Release.

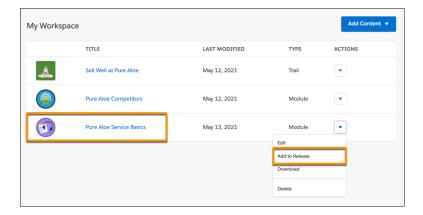
**How:** Customizing the filters on myTrailhead requires collaboration among multiple users: admins, writers, and release managers. To make a new filter available, the admin selects the filter category in Trailmaker Settings and adds the filter name to the category list.



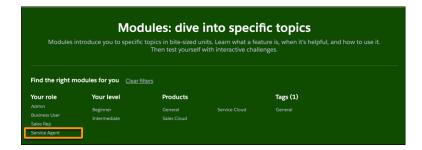
Adding the filter in Trailmaker Settings adds the filter to the corresponding category list in Trailmaker Content. Then the writer can use Trailmaker Content to assign the new filter to a module or trail.



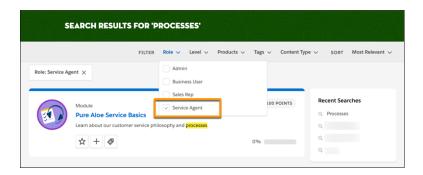
The writer or release manager uploads that content from Trailmaker Content to Trailmaker Release.



The writer and release manager confirm in preview mode that the new filter is visible. After the release is published, Trailblazers can sort content by the new 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 a filter.



 $\label{thm:collaboration} \mbox{Deleting a filter from myTrailhead is a similar collaboration.}$ 

- 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 revised modules and trails from Trailmaker Content to Trailmaker Release.
- The writer and release manager confirm in preview mode that the filter is no longer visible.
- 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 corresponding category list in Trailmaker Settings, which also removes it from the category list 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)

# See myTrailhead and Salesforce Trailhead Content via the Same Login with Salesforce Identity for myTrailhead

Salesforce Identity for myTrailhead users already benefit from one-click access to myTrailhead. Now they can enjoy one-click access to public Salesforce Trailhead from the same login. Whether your users are on Learning Paths in Lightning Experience or your company's myTrailhead site, myTrailhead and Salesforce Trailhead content is within easy reach.

**Where:** myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost. Learning Paths are available to Lightning Experience users in Developer, Professional, Enterprise, Performance, and Unlimited editions.

**Who:** All users with the myTrailhead Content Access permission can log in to their company's myTrailhead site. All Lightning Experience users have access to the Learning Paths icon in the global header and the associated learning panel and Learning Home page. Admins with Modify All Data or Customize Application permission can assign Learning Paths items to users via Learning Home.

**Why:** Admins who create Learning Paths assignments can select from the libraries of content on myTrailhead and Salesforce Trailhead, assigning the most relevant modules from either site.

All users can build trailmixes that contain content from myTrailhead and Salesforce Trailhead, mixing and matching to customize their own personalized learning journey. If users choose to share their trailmixes, these hybrid compilations are visible on the Trailmixes tab on myTrailhead.

Enablement professionals who assign trailmixes via Trail Tracker can create and assign these hybrid trailmixes. They can also use Trail Tracker to report on user activity on myTrailhead and Salesforce Trailhead.

SEE ALSO:

Salesforce Help: Considerations for Choosing Salesforce Identity for myTrailhead (can be outdated or unavailable during release preview)

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

# Simplify Metadata for myTrailhead Trails and Modules

Spend more time collaborating and writing excellent learning content, and worry less about tagging all your content consistently. The Tags category for myTrailhead content filters now applies only to units, and is no longer available for trails and modules. This change simplifies how content producers prepare and categorize information, and it removes noise for learners who view and search for that content.

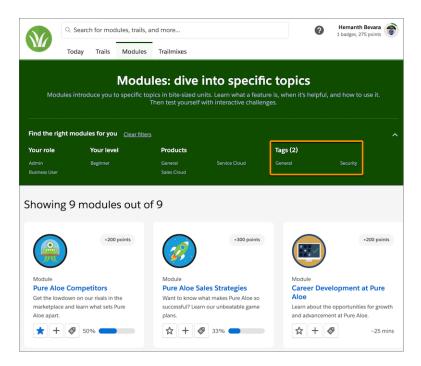
Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This change becomes effective in August 2021.

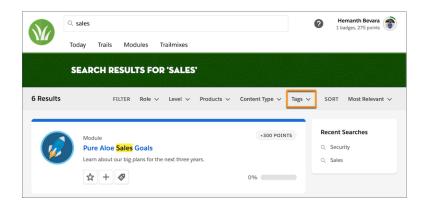
**Who:** This change affects users with the myTrailhead Content Access permission, who are often your learners who search for and complete myTrailhead learning content.

Learners *no longer* see Tags information in these locations:

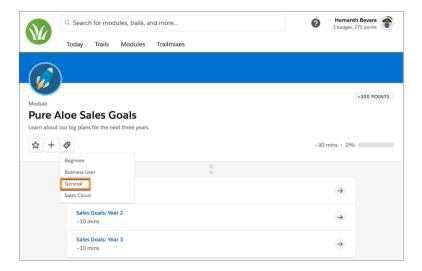
The Tags category in the list of filters on the Trails index page or Modules index page.



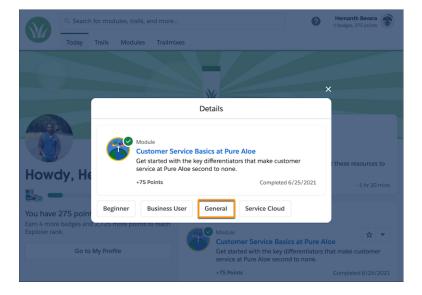
• The Tags category in the list of filters on search results.



• Specific Tag filters when viewing a trail or module page.



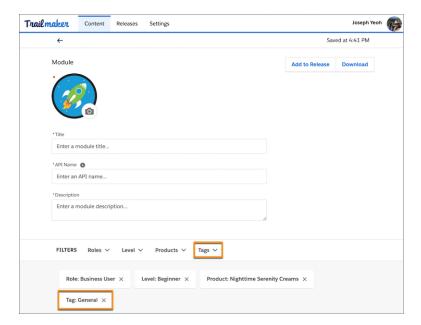
• Specific Tag filters when viewing the details of the module from the Today page.



# Note:

- A Trailblazer's skills graph remains available, because the skills data is based on a unit's Tag values.
- In the Trailhead GO mobile app, learners no longer see the Skills filter category for trails and modules. Skills correspond to the Tags filter category in the web browser experience.

This change also affects internal users with the myTrailhead Content Creation permission, who author content in the Trailmaker Content app. Content creators *no longer* see the Tags filter when they edit a trail or module.



Note: The Tags category remains available when a content creator edits a unit.

**How:** To support this change, Tags data is excluded from the backpack for a trail and module that's created after this change becomes effective. The trail.json or module.json file in a backpack contains only an empty tags array:

```
"filters": {
    "levels": [
        "beginner"
],
    "products": [
        "general"
],
    "roles": [
        "user"
],
    "tags": []
```

For existing trails and modules that you created before this change, the backpack data retains the Tags data. However, any existing tag values are no longer validated when you import or export a backpack.

```
"filters": {
    "levels": [
        "beginner"
],
    "products": [
        "general"
],
    "roles": [
        "user"
],
    "tags": [
        "general"
```

```
1
}
```

Salesforce Help: Create a Module in Trailmaker Content

Salesforce Help: Create a Trail in Trailmaker Content

Salesforce Help: Revise Existing Content with Trailmaker Content

Salesforce Help: Find Content on myTrailhead

### **Pardot**

Use the power of Einstein to better understand your accounts and boost email engagement with Einstein Send Time Optimization. We also improved Pardot Object Sync and made it generally available along with account-based campaign management tools. You can also upgrade your mailability model for simplified email marketing settings and enjoy new and improved developer docs that make it easier to use Pardot APIs.

### IN THIS SECTION:

### Marketer Experience

Upgrade your mailability model for simplified email marketing settings and differentiate list emails as operational. Plus, see improvements to the dynamic content list view and List Email Statistics table.

### Data and Analytics

Object Sync for Pardot is generally available in Summer '21 to optimize your dataset performance in Tableau CRM. Opt into Einstein Key Accounts Identification (beta) to give artificial intelligence a shot at prioritizing your account-based marketing efforts.

#### Platform

Pardot Platform updates include a new way to delegate Pardot setup tasks.

### Pardot API: New and Changed Items

Use the Pardot API more effectively with changed metadata and overhauled developer docs.

# Marketer Experience

Upgrade your mailability model for simplified email marketing settings and differentiate list emails as operational. Plus, see improvements to the dynamic content list view and List Email Statistics table.

#### IN THIS SECTION:

### Engagement Studio Metrics Formulas Were Changed

Open and click-through rate metrics on Engagement Studio reports are now based on delivered emails. The new formula is the same as what's used on other email reports, so values are consistent throughout Pardot.

### List Email Reporting Pages Were Changed

To meet new design guidelines List Email reports include minor changes, such as turning pie charts into donut charts.

### Get More Clarity and Control on Email Marketing Settings

Upgrade your mailability model for simplified email marketing settings and more clarity about a prospect's mailable status. After you upgrade, prospect records include a mailability section showing the factors that determine whether the prospect can receive marketing emails. View their overall mailable status, Do Not Email and Opted Out settings, and bounce information. And edit these settings in Automation Rules, Engagement Studio, and prospect import.

### Mark List Emails in Lightning as Operational

Sometimes marketers must send critical notifications and operational messages to their customers regardless of whether the customer opted in to receive marketing emails. Mark list emails in Lightning as operational to bypass opt-in status for certain types of messages.

### View List Email Statistics in Less Time

If you're a busy marketer, chances are you have a lot of list email data in Pardot. To improve load time, the List Email Statistics table now defaults to show the last 30 days worth of data. Don't worry, you can still filter the table to see all your data at once if you prefer.

### Make Sure Emails Have the Right Dynamic Content

Dynamic content merge fields in draft emails and templates display the ID for that piece of dynamic content. But how do you know what content your recipients actually see? Now, there's a column for ID numbers on the Dynamic Content list view so you can make sure you have the right merge field in your emails.

### **Engagement Studio Metrics Formulas Were Changed**

Open and click-through rate metrics on Engagement Studio reports are now based on delivered emails. The new formula is the same as what's used on other email reports, so values are consistent throughout Pardot.

Where: This change applies to all Pardot editions.

### List Email Reporting Pages Were Changed

To meet new design guidelines List Email reports include minor changes, such as turning pie charts into donut charts.

Where: This change applies to all Pardot editions.

## Get More Clarity and Control on Email Marketing Settings

Upgrade your mailability model for simplified email marketing settings and more clarity about a prospect's mailable status. After you upgrade, prospect records include a mailability section showing the factors that determine whether the prospect can receive marketing emails. View their overall mailable status, Do Not Email and Opted Out settings, and bounce information. And edit these settings in Automation Rules, Engagement Studio, and prospect import.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

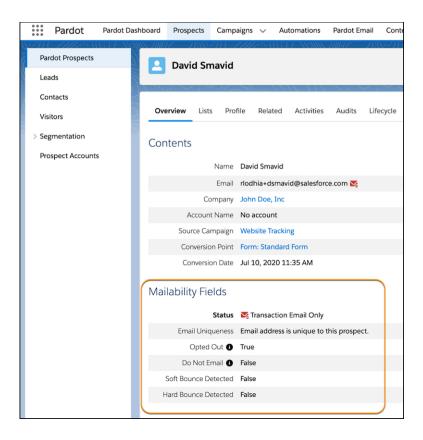


**Note:** Upgrading is permanent and can affect your current email marketing settings. Click and read the considerations to access the upgrade.

**How:** Admins can enable the mailability changes from the banner that appears in the Pardot Dashboard.



After you upgrade, you can view and edit mailability settings on the prospect record.



Salesforce Help: Considerations for Upgrading Email Marketing Settings (can be outdated or unavailable during release preview)

# Mark List Emails in Lightning as Operational

Sometimes marketers must send critical notifications and operational messages to their customers regardless of whether the customer opted in to receive marketing emails. Mark list emails in Lightning as operational to bypass opt-in status for certain types of messages.

**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.

**How:** You must have operational email sending enabled. Select **Operational** when you send an email from the email content record. Operational emails are non-promotional emails that send regardless of recipient's opt-out status.

SEE ALSO:

Salesforce Help: Enable Operational Email Sending(can be outdated or unavailable during release preview)

### View List Email Statistics in Less Time

If you're a busy marketer, chances are you have a lot of list email data in Pardot. To improve load time, the List Email Statistics table now defaults to show the last 30 days worth of data. Don't worry, you can still filter the table to see all your data at once if you prefer.

Where: This change applies to all Pardot editions.

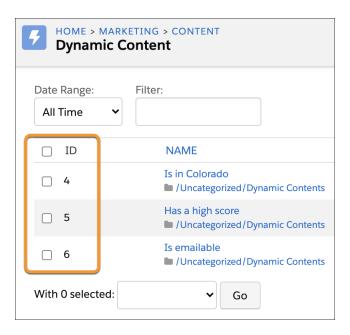
SEE ALSO:

Salesforce Help: List Email Statistics Table (can be outdated or unavailable during release preview)

### Make Sure Emails Have the Right Dynamic Content

Dynamic content merge fields in draft emails and templates display the ID for that piece of dynamic content. But how do you know what content your recipients actually see? Now, there's a column for ID numbers on the Dynamic Content list view so you can make sure you have the right merge field in your emails.

Where: This change applies to all Pardot editions.



SEE ALSO:

Salesforce Help: Target Prospects with Custom Content (can be outdated or unavailable during release preview)

# Data and Analytics

Object Sync for Pardot is generally available in Summer '21 to optimize your dataset performance in Tableau CRM. Opt into Einstein Key Accounts Identification (beta) to give artificial intelligence a shot at prioritizing your account-based marketing efforts.

IN THIS SECTION:

### Boost Email Engagement with Einstein Send Time Optimization

Send list emails to individual prospects at their preferred times. Einstein eliminates guesswork and elaborate segmentation with Einstein Send Time Optimization. Use Einstein's machine learning skills to select the ideal send time for each email and prospect. Einstein Send Time Optimization is available for use with Pardot's new email send experience only.

### Qualify Your Best Accounts with Al

Accounts generate a lot of data, and it can be tough to parse which trends are the most impactful. Now, Einstein's account identification models can tell you which accounts have the highest likelihood of becoming your best customers.

### Set Up Your Image Repository Faster with a Default CDN Domain

Get your email marketers up and running faster when you use My Domain with your Salesforce CMS image repository. The new default CDN domain for public channels option is now available during CMS setup, eliminating the need to work with a web admin or domain registrar. To use this domain with Pardot Email, an admin must deploy My Domain.

### Enhancements to Pardot Object Sync (Generally Available)

Pardot Object Sync is now generally available, and it comes with a new name: Object Sync for Pardot (OSP). There are a few improvements such as expanded visitor data and flexibility for business units. To get access to these updates, users must create an app with the new app template.

### Track Accounts as Campaign Members

Account-Based Campaign Management tools are now generally available. Add accounts as campaign members from related lists and create standard and custom reports to track their engagement.

### Boost Email Engagement with Einstein Send Time Optimization

Send list emails to individual prospects at their preferred times. Einstein eliminates guesswork and elaborate segmentation with Einstein Send Time Optimization. Use Einstein's machine learning skills to select the ideal send time for each email and prospect. Einstein Send Time Optimization is available for use with Pardot's new email send experience only.

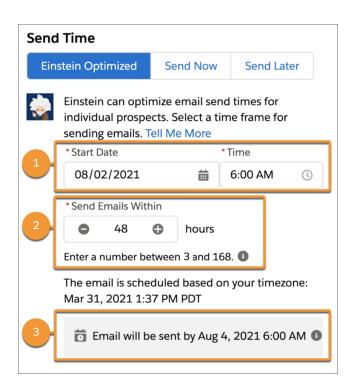
**Where:** This change is available in Pardot Advanced and Premium editions with Salesforce Enterprise, Performance, or Unlimited edition. It's available in Lightning Experience only.

**How:** After you enable Einstein Send Time Optimization in Marketing Setup, a training period begins. After about 72 hours, your marketing users can select the Einstein Optimized sending option when they're ready to send an email.



Enter the start date, start time (1), and a time frame for sending (2), and let Einstein do its work. The sending time frame can be anywhere from 3 hours to 7 days, so you can experiment with different durations.

It takes an hour for Einstein to evaluate engagement data for each prospect, so allow at least an extra hour when you enter the time frame value. If you're sending a time-sensitive message, you can be certain that emails are sent by a certain time. Check the information box (3) at the end of the form to verify the last possible time to send an email.



Salesforce Help: Optimize Send Times with Einstein (can be outdated or unavailable during release preview)

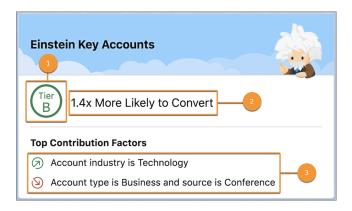
# Qualify Your Best Accounts with Al

Accounts generate a lot of data, and it can be tough to parse which trends are the most impactful. Now, Einstein's account identification models can tell you which accounts have the highest likelihood of becoming your best customers.

**Where:** This change applies to Salesforce Enterprise, Professional, and Unlimited editions with Pardot Advanced or Premium. It's available in Lightning Experience only.

**How:** Turn on Einstein Key Accounts Identification (beta) in Salesforce Setup, and then verify that the Einstein Scoring component appears on account records. It takes a few days for Einstein to build your custom model based on your Salesforce account data and supplemental data from the public web.

When the model identifies correlations among your accounts and their predicted outcomes, they're assigned a tier ranking (1). Einstein also tells you how likely it is for an account to have an opportunity created in the next six months (2). Key factors, such as the impact of industry or recent engagement (3), appear and evolve in the Einstein Scoring card as additional data becomes available.



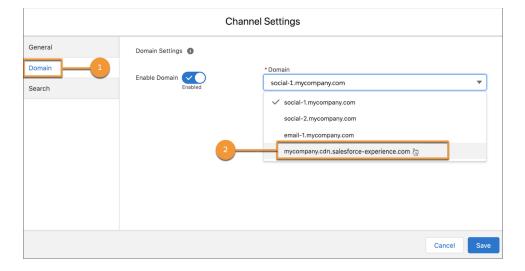
Salesforce Help: Einstein Key Accounts Identification (Beta) (can be outdated or unavailable during release preview)

# Set Up Your Image Repository Faster with a Default CDN Domain

Get your email marketers up and running faster when you use My Domain with your Salesforce CMS image repository. The new default CDN domain for public channels option is now available during CMS setup, eliminating the need to work with a web admin or domain registrar. To use this domain with Pardot Email, an admin must deploy My Domain.

**Where:** Available in Lightning Experience only. This change applies to Salesforce Enterprise, Professional, and Unlimited editions with any Pardot edition.

**How:** With My Domain deployed, a new default CDN domain now appears in the domains dropdown when you configure the CMS Channel to use with Pardot Email.





**Note**: To use Pardot Email with CMS image hosting in a sandbox, first deploy My Domain to the sandbox. You can select the default CDN domain when you configure CMS channels, or use your own. If you use a non-CDN domain, you can still use Pardot Email in sandboxes but the CMS integration is unavailable. Emails don't send from sandbox accounts.

### SEE ALSO:

Share CMS Content through a Default Domain in Public Channels

Salesforce Help: Choose a My Domain Name (can be outdated or unavailable during release preview)

Salesforce Help: Create a Domain for Pardot Email (can be outdated or unavailable during release preview)

### Enhancements to Pardot Object Sync (Generally Available)

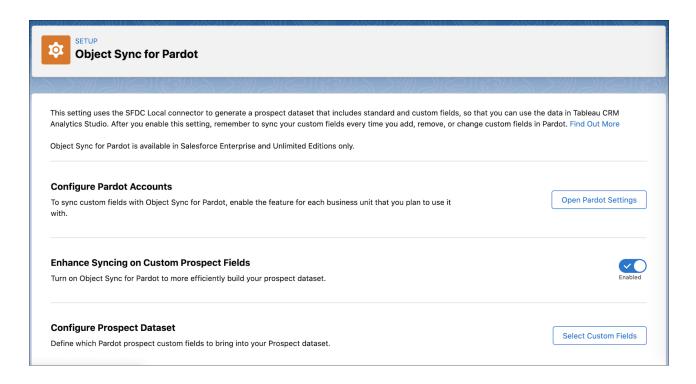
Pardot Object Sync is now generally available, and it comes with a new name: Object Sync for Pardot (OSP). There are a few improvements such as expanded visitor data and flexibility for business units. To get access to these updates, users must create an app with the new app template.

**Where:** This change applies to Pardot Plus, Advanced, and Premium editions with Salesforce Enterprise, Performance, and Unlimited editions.

Why: Object Sync for Pardot (OSP) behaves a little differently now. Here's what to look out for.

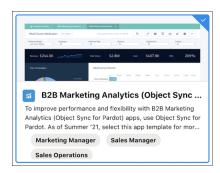
- The B2BMktVisitor object now includes all visitor activity data, not just the first and last interactions.
- We fixed an issue for the beta users where custom fields appeared in OSP app templates but not in the app templates without the OSP enhancements. Custom fields now appear in each type of app.
- You can now exclude certain business units from OSP setup. To exclude one, skip the setup step that allows replication in that business unit's Pardot settings. If you accidentally turn on OSP in Salesforce but not in Pardot, a replication error appears in the Tableau CRM Data Monitor.
- We created a new app template. Instead of updating an app you used during the beta period, create an app using the B2B Marketing Analytics (Object Sync for Pardot) app template.

**How:** Setting up Object Sync for Pardot (OSP) is a multistep process, which is outlined in Marketing Setup. Head over to Marketing Setup, and search for <code>Object Sync</code> to find a step-by-step setup page. It shows how to enable the feature in Salesforce and Pardot, select the Pardot fields to include in Tableau CRM, and then perform an initial sync. For the latest data, we encourage you to schedule replication.



After all the preparation work is done, your users can create a B2B Marketing Analytics app that includes Object Sync's enhanced datasets. No changes were made to the B2B Marketing Analytics Plus apps, Account-Based Marketing or Marketing Campaign Intelligence, so the setup for those apps is the same as always.

The app creation process is a bit different for B2B Marketing Analytics users who participated in the beta period and people who didn't participate. If you participated in the beta, back up your existing apps, and then create one using the B2B Marketing Analytics (Object Sync for Pardot) app template. Upgrading your beta app erases the original Pardot Object Sync functionality.



If you're new to Object Sync, all you have to do is create an app using the B2B Marketing Analytics (Object Sync for Pardot) app template.

SEE ALSO:

Salesforce Help: Object Sync for Pardot (can be outdated or unavailable during release preview)

### Track Accounts as Campaign Members

Account-Based Campaign Management tools are now generally available. Add accounts as campaign members from related lists and create standard and custom reports to track their engagement.

Where: This change is available in all Salesforce editions.

SEE ALSO:

Focus on Accounts by Tracking as Campaign Members (Generally Available)

# **Platform**

Pardot Platform updates include a new way to delegate Pardot setup tasks.

IN THIS SECTION:

### Designate a Marketing Admin to Handle Pardot Setup Tasks

A new user permission makes it easy to designate a marketing admin to handle Pardot setup and management tasks. Assign the new Manage marketing setup tasks permission and the View setup and configuration permission to grant access to all the Pardot configuration options in Salesforce Marketing Setup.

### Designate a Marketing Admin to Handle Pardot Setup Tasks

A new user permission makes it easy to designate a marketing admin to handle Pardot setup and management tasks. Assign the new Manage marketing setup tasks permission and the View setup and configuration permission to grant access to all the Pardot configuration options in Salesforce Marketing Setup.

Where: This change applies to all Pardot editions.

**How:** Create a custom permission set and apply it to the user of your choice or edit an existing custom permission set. To have full access to Marketing Setup and Pardot configuration pages, users need both the Manage marketing setup tasks permission and the View setup and configuration permission.

**Why:** Pardot setup tasks sometimes require both a Salesforce admin and a Pardot admin to complete. Now, a single person designated as the Marketing Admin in Salesforce can manage all of Pardot setup, without giving them more access than they need.

SEE ALSO:

Salesforce Help: Designate an Admin for Marketing Setup Tasks (can be outdated or unavailable during release preview)

# Pardot API: New and Changed Items

Use the Pardot API more effectively with changed metadata and overhauled developer docs.

#### Metadata API: PardotSettings

 $Added\ \verb|enableEnhancedProspectCustomFieldsSync| to support\ Object\ Sync| for\ Pard ot\ becoming\ generally\ available.$ 

Deprecated enablePardotObjectSync to close out Pardot Object Sync (beta).

### Metadata API: CampaignSettings

Added enableAccountsAsCM to support Account-Based Campaign Management becoming generally available (formerly called Accounts as Campaign Members).

# IN THIS SECTION:

# Get More Done with Better Pardot Developer Docs

The overhauled the Pardot API documentation now makes it easier than ever to use Pardot APIs. From new content, to updated code samples, to newly documented endpoints, the docs are more useful, consistent, and organized. Want to know just how much changed? There were 4,891 additions and 3,085 deletions.

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Where: This change applies to all editions of Pardot.

**How:** Visit the Pardot Developer docs at https://developer.pardot.com.

# Revenue

Update permissions, assign new permission sets, and enable settings for permissions and browser performance improvements. Use a new required picklist.



**Note:** Salesforce CPQ and Salesforce Billing Summer '21 support both New Order Save Behavior and Old Order Save Behavior. Installations of Salesforce CPQ and Salesforce Billing Summer '21 work on subscriber orgs regardless of the subscriber org's order save behavior. Previous versions of Salesforce CPQ and Billing still sometimes don't work correctly if installed while the New Order Save Behavior release update is enabled.

#### IN THIS SECTION:

#### Salesforce CPQ

Test upcoming permission set changes and enable browser performance improvements.

# Salesforce Billing

Use a new required picklist for business categories in Customer Asset Lifecycle Management. Credit notes created with Cancel and Rebill now inherit billing and tax rules from invoice lines.

# SEE ALSO:

*Knowledge Article*: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Summer '21 (can be outdated or unavailable during release preview)

# Salesforce CPQ

Test upcoming permission set changes and enable browser performance improvements.



#### Note:

- Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.
- Salesforce CPQ and Salesforce Billing Summer '21 support both New Order Save Behavior and Old Order Save Behavior.
   Installations of Salesforce CPQ and Salesforce Billing Summer '21 work on subscriber orgs regardless of the subscriber org's order save behavior. Previous versions of Salesforce CPQ and Billing still sometimes don't work correctly if installed while the New Order Save Behavior release update is enabled.

# IN THIS SECTION:

# Assign and Test Access Permission Sets for Data Security

Assign new Access permission sets to Salesforce CPQ users and customer users. Access permission sets contain important data security settings for Salesforce CPQ Summer '21 and future releases. The Access sets consist of Salesforce CPQ User Access and Salesforce CPQ Customer User Access.

# Enable Browser Performance Improvements for Salesforce CPQ (Update)

This update allows Salesforce CPQ to run faster in supported web browsers by employing new Web Components V1 technology.

#### SEE ALSO:

*Knowledge Article*: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Summer '21 (can be outdated or unavailable during release preview)

# Assign and Test Access Permission Sets for Data Security

Assign new Access permission sets to Salesforce CPQ users and customer users. Access permission sets contain important data security settings for Salesforce CPQ Summer '21 and future releases. The Access sets consist of Salesforce CPQ User Access and Salesforce CPQ Customer User Access.

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

**Why:** We'll be introducing more data security-related permissions to the Access permission sets in future releases. While most CPQ admins clone and then edit standard permission sets for org users, we designed Access sets to be assigned directly to users without any cloning or editing. This way, your users will never risk missing important data security updates for new releases.

As of Salesforce CPQ Summer '21, the Salesforce CPQ User Access and Salesforce CPQ Customer User Access sets include Read access requirements for the Localization object.

**How:** Data restrictions for the Access permission sets won't be enforced until Salesforce CPQ Spring '22. Before then, you have some options for testing them in your org. When the CPQ package setting Perform Enhanced Data Access Checks is active, Salesforce CPQ enforces data restrictions for the Access permission sets. When Perform Enhanced Data Checks is inactive, the Access permission set restrictions aren't enforced.

To start testing, assign the Salesforce CPQ User Access set to your users. Then assign the Salesforce CPQ Customer User Access set to your customer users. Next, from setup, in the Quick Find box, enter <code>Installed Packages</code>, and then click **Installed Packages**. Go to Salesforce CPQ and click **Configure**. In the Additional Settings tab, select **Perform Enhanced Data Access Checks**.

You can turn Perform Enhanced Data Access Checks on and off as needed before Spring '22. In Spring '22, we'll be removing the Perform Enhanced Data Access Checks setting and enforcing data restrictions for the Access permission sets.

# SEE ALSO:

Salesforce Help: Manage Permission Set Assignments (can be outdated or unavailable during release preview)
Salesforce Help: Salesforce CPQ Permissions (can be outdated or unavailable during release preview)

# Enable Browser Performance Improvements for Salesforce CPQ (Update)

This update allows Salesforce CPQ to run faster in supported web browsers by employing new Web Components V1 technology.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce Mobile App.

When: This update is introduced in Summer '21 and is enforced when a sandbox or production org is upgraded to Spring '22.

**How:** From Setup, in the Quick Find box, enter *Installed*, and then click **Installed Packages**. Next to the Salesforce CPQ package, click **Configure**. In the Additional Settings tab, select **Improve Browser Performance**.

To test this update, we recommend working in a sandbox. This update is automatically enforced when you upgrade to Spring '22.

With Web Components V1 technology Salesforce CPQ runs faster, but the look and feel of your customizations can change. We recommend that you test your customizations on desktop and in the Salesforce Mobile App, focusing on these features:

- quote line editor
- product selection
- Salesforce CPQ favorites
- product bundle configuration
- quote calculator plugin
- page security plugin

After the update is applied, depending on your customizations and the browser that's used, some differences to the user interface are expected. To learn more about these known differences, see *Knowledge Article*: UI Changes Caused By Browser Performance Improvements for Salesforce CPQ.

SEE ALSO:

Release Update Announcements

# Salesforce Billing

Use a new required picklist for business categories in Customer Asset Lifecycle Management. Credit notes created with Cancel and Rebill now inherit billing and tax rules from invoice lines.



# Note:

- To install Salesforce Billing, you must have Salesforce CPQ. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.
- Salesforce CPQ and Salesforce Billing Summer '21 support both New Order Save Behavior and Old Order Save Behavior.
   Installations of Salesforce CPQ and Salesforce Billing Summer '21 work on subscriber orgs regardless of the subscriber org's order save behavior. Previous versions of Salesforce CPQ and Billing still sometimes don't work correctly if installed while the New Order Save Behavior release update is enabled.

# IN THIS SECTION:

# Use the Business Category Picklist in Customer Asset Lifecycle Management

Preserve data integrity while allowing revenue reporting across business categories by using a new required field, Business Category. This picklist is a replacement for the Category picklist, now relabeled Category (Deprecated). Asset action totals are broken out by the picklist values on Business Category, and those totals are reflected on assets.

# Credit Notes Created with Cancel and Rebill Now Inherit Tax and Billing Rules from Invoice Line

When you cancel and rebill an invoice, the resulting credit notes inherit their tax rules and billing rules from their source invoice lines. Previously, credit notes created with Cancel and Rebill set the tax rules and billing rules from the invoice line's product record.

# Edit and Delete Values in Finance Transaction and Finance Balance Snapshot Picklist Fields

You can now delete and edit picklist values in the Event Type, Event Action, and Reference Entity fields in finance transactions and finance balance snapshots.

SEE ALSO:

*Knowledge Article*: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Summer '21 (can be outdated or unavailable during release preview)

# Use the Business Category Picklist in Customer Asset Lifecycle Management

Preserve data integrity while allowing revenue reporting across business categories by using a new required field, Business Category. This picklist is a replacement for the Category picklist, now relabeled Category (Deprecated). Asset action totals are broken out by the picklist values on Business Category, and those totals are reflected on assets.

Where: This change applies to Lightning Experience in Salesforce Billing.

**How:** Category (Deprecated) is available through Winter '22. In your asset layouts and reports, replace Category (Deprecated) with Business Category. There's no need to migrate data from the old field to the new. The picklist values are identical, and records show the same value in both fields.

SEE ALSO:

Salesforce Help: Asset Action Object and Fields (can be outdated or unavailable during release preview)

# Credit Notes Created with Cancel and Rebill Now Inherit Tax and Billing Rules from Invoice Line

When you cancel and rebill an invoice, the resulting credit notes inherit their tax rules and billing rules from their source invoice lines. Previously, credit notes created with Cancel and Rebill set the tax rules and billing rules from the invoice line's product record.

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

When: This change is available in Salesforce Billing Summer '21 Patch 2.

**Why:** Previously, inheriting the billing rules and tax rules from the parent product caused issues if a user or process changed the billing or tax rules on order products or invoice lines created from that product. In that case, users expected the credit note to have the changed tax or billing rules instead of the product's billing or tax rules.

# Edit and Delete Values in Finance Transaction and Finance Balance Snapshot Picklist Fields

You can now delete and edit picklist values in the Event Type, Event Action, and Reference Entity fields in finance transactions and finance balance snapshots.

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

# Sales

Pipeline Inspection gives sales teams a single pipeline view and helps them focus on the most important deals. Create and manage forecast types to get more options and an improved experience. Get more refined email engagement data and improved email templates. Help sales reps adopt and adhere to company policies and COVID-19 safety protocols using flows in Salesforce Maps. Salesforce Meetings gives reps more insights to help keep deals moving. Einstein Conversation Insights is available for service agents.

# IN THIS SECTION:

# Pipeline Inspection

Give sales teams visibility into the health of their pipelines so they can more accurately forecast revenue. Pipeline Inspection gives teams a consolidated view of their pipeline metrics, opportunities and insights into recent changes, and multiple filtering options. Managers can use views of teams and individual reps to identify trends and deals that need more support.

#### Core Sales Features

Get more options for creating and managing forecast types. And create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior.

# **Productivity Features**

Connect Einstein Activity Capture to your Microsoft Exchange on-premises server with a service account. Record calls with Dialer by default. Get more control of what email behavior counts as an engagement. Package builder email templates easier than before.

# Salesforce Maps

Increase adoption of and adherence to company policies and safety protocols. Plot data from proprietary and third-party systems on the map, and plan territories that align with leadership's business targets.

#### Salesforce Meetings

Reps can now take more actions and receive more insights to address customer concerns without leaving Salesforce Meetings. Microsoft Teams users can add the Meeting Digest within Teams.

# Einstein Conversation Insights

Einstein Conversation Insights is now available to sales users without the High Velocity Sales product. And service agents can use the product's coaching features with new service-related insights. Your users can also leave Chatter comments on call segments, and we're rolling out a bevy of features for video calls.

# High Velocity Sales

Report on engagement for leads, contacts, users, and sales cadences. Add LinkedIn steps to sales cadences and see engagement data on sales cadence pages.

#### Sales Cloud Einstein

Score different types of leads separately for more accurate scores and set up Einstein Lead Scoring more easily with guided setup.

# Integration with Google

Block internal email opens from email tracking in the Gmail integration with Inbox. For customers who sync events with Lightning Sync, include Google Meet joining details on Google Calendar events.

# Integration with Microsoft®

New server and client setup options available for the Outlook integration. The side panel action menu in Salesforce for Outlook is no longer available.

#### Other Changes in the Sales Cloud

Learn about other changes we made to improve usability.

# Pipeline Inspection

Give sales teams visibility into the health of their pipelines so they can more accurately forecast revenue. Pipeline Inspection gives teams a consolidated view of their pipeline metrics, opportunities and insights into recent changes, and multiple filtering options. Managers can use views of teams and individual reps to identify trends and deals that need more support.

# IN THIS SECTION:

#### Drive Sales Team Accountability with Pipeline Inspection

Pipeline Inspection gives sales teams a single view of their pipelines with key metrics, opportunities, and weekly changes in close dates, amounts, stages, and forecast categories. With these insights, sales teams can focus on the most important opportunities, and sales managers can spend more time coaching reps to close more deals.

# Drive Sales Team Accountability with Pipeline Inspection

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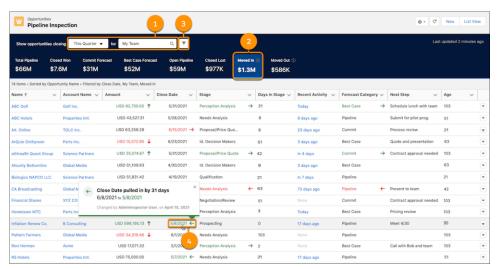
Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**When:** This feature is available in production shortly after all instances are upgraded to the Summer '21 release. To see the feature in sandboxes, run Match Production License or request a refresh after the feature is available in production.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set.

**How:** From Setup, in the Quick Find box, enter *Pipeline Inspection*, and then select **Pipeline Inspection Setup**. Turn on Pipeline Inspection and verify that you have Historical Trending enabled and configured for opportunities. Add the Pipeline Inspection button and assign the Pipeline Inspection permission set to the users who you want to have access to Pipeline Inspection.

When enabled, users access Pipeline Inspection from the Opportunities tab.



Greater visibility into pipelines means sales managers and reps can more accurately forecast their revenue. Sales teams can filter the Pipeline Inspection view multiple ways. Use the quick filters to narrow the view by time period, team, or sales rep (1). Click any of the pipeline metrics, such as Moved In, to see a list of matching opportunities (2). Or refine the view with filter criteria (3).

Filtering the view using the pipeline metrics allows sales managers and reps to identify areas of the pipeline that they want to address. For example, Moved In (3) shows the deals with close dates that were moved into the selected period from a later one.

To help sales managers and reps identify deals that need more attention, recent changes are highlighted in the opportunity list. Changes to amounts, close dates, forecast categories, and stages are highlighted with red and green text and arrows. To see what changed, and when and who made the change, hover over the highlighted text (4). Also, details about recent activities on an opportunity are available when users hover over the value in the Recent Activity field.

To view these insights in Pipeline Inspection, Historical Trending must be enabled for opportunities.

# SEE ALSO:

Salesforce Video: Ensuring Sales Rep Accountability with Pipeline Inspection (English Only)

Salesforce Help: Managing Pipelines with Pipeline Inspection (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Pipeline Inspection (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Historical Trend Reporting (can be outdated or unavailable during release preview)

# **Core Sales Features**

Get more options for creating and managing forecast types. And create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior.

#### IN THIS SECTION:

# Collaborative Forecasts

Create and manage forecast types more efficiently. And get more options for custom measure forecasts.

#### Campaigns

Better organize your account-based marketing efforts when you add accounts as campaign members.

# **Orders**

Package providers can create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior.

#### Other Changes in Core Sales Features

Expand your sales reps' view of the customer and their outreach options with a native LinkedIn Sales Navigator integration. The original territory management feature was retired. Delete your original territory management sharing records on the Release Updates page in Setup. And track ForecastingItem records that changed.

# Collaborative Forecasts

Create and manage forecast types more efficiently. And get more options for custom measure forecasts.

#### IN THIS SECTION:

# Get an Improved Experience from Forecast Types in Setup

Forecast type administration has a whole new look and feel. Now a setup flow guides you through the steps to create forecast types. Then you manage your forecast types on the Forecast Types page. The Setup redesign makes it easy.

# Measure Forecasts Your Way in Lightning Experience

Now you can base forecasts on custom fields of the currency or number data types. This change means that you have more flexibility to reflect your business model with Collaborative Forecasts.

#### SEE ALSO:

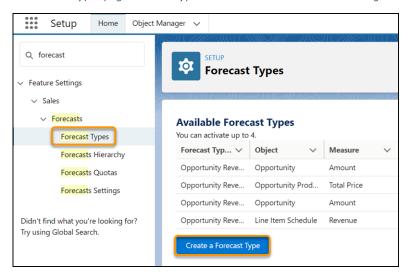
Attributes Added to ForecastingItem

# Get an Improved Experience from Forecast Types in Setup

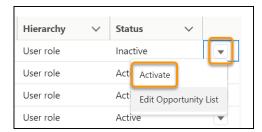
Forecast type administration has a whole new look and feel. Now a setup flow guides you through the steps to create forecast types. Then you manage your forecast types on the Forecast Types page. The Setup redesign makes it easy.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** To get started, select **Forecast Types** from the Setup tree. If you're using Salesforce Classic, switch to Lightning Experience to find the Forecast Types page. Forecast type administration is now available in Lightning Experience only.



Next, click **Create a Forecast Type**, and then move through the setup flow to select an object, measure, date type, and hierarchy to forecast on. Optionally, specify a split type or product family grouping. Give the forecast type an appropriate name. And choose the opportunity fields to show as columns in the opportunity list.



Then activate the new forecast type to make it available to users.

Enterprise API, Metadata API, and Tooling API support forecast type creation and management.

# SEE ALSO:

Salesforce Help: Create and Manage Forecast Types in Collaborative Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Forecast Types in Collaborative Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Setting Up Einstein Forecasting (can be outdated or unavailable during release preview)

Measure Forecasts Your Way in Lightning Experience

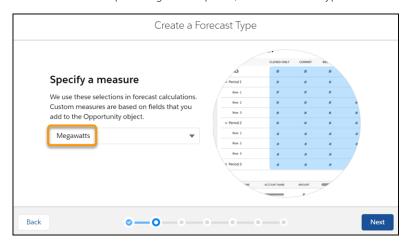
# Measure Forecasts Your Way in Lightning Experience

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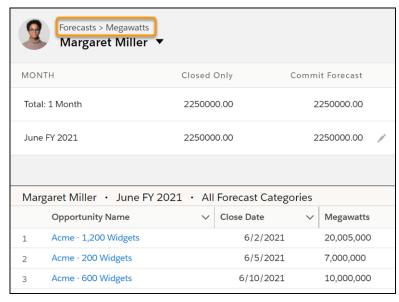
Where: This change applies to Lightning Experience in Performance Edition and in Unlimited Edition with the Sales Cloud.

**When:** This feature is available in production shortly after all instances are upgraded to the Summer '21 release. To see the feature in sandboxes, run Match Production License or request a refresh after the feature is available in production.

How: Here's an example. Using the setup flow, create a forecast type based on the Megawatts field on the Opportunity object.



Then activate the forecast type to make it available to your users.



Enterprise API, Metadata API, and Tooling API support custom measure forecasts.

# SEE ALSO:

Salesforce Help: Create and Manage Forecast Types in Collaborative Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Forecast Types in Collaborative Forecasts (can be outdated or unavailable during release preview)

Get an Improved Experience from Forecast Types in Setup

# Campaigns

Better organize your account-based marketing efforts when you add accounts as campaign members.

# IN THIS SECTION:

# Focus on Accounts by Tracking as Campaign Members (Generally Available)

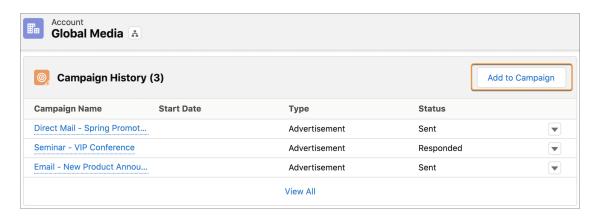
Account-Based Campaign Management tools are now generally available. Add accounts as campaign members from related lists and create standard and custom reports to track their engagement.

# Focus on Accounts by Tracking as Campaign Members (Generally Available)

Account-Based Campaign Management tools are now generally available. Add accounts as campaign members from related lists and create standard and custom reports to track their engagement.

Where: This change is available in all Salesforce editions.

**How:** To allow users to add accounts as campaign members, turn on the feature in Salesforce Setup. Then update your page layouts to include the Campaign History related list on account records.



Accounts, including person accounts, that are added as campaign members also appear in Campaigns and Campaign Member related lists and standard reports.

# SEE ALSO:

Salesforce Help: Accounts as Campaign Members (can be outdated or unavailable during release preview)

# **Orders**

Package providers can create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior.

# IN THIS SECTION:

# Provide Patch Upgrades for Non-Lightning Flow 1GP Packages that use New Order Save Behavior

You can now create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior. If the subscriber uses Lightning Flow, you must still create minor versions instead of patch upgrades. Previously, patch upgrades for 1GP packages failed if the package developer had New Order Save Behavior enabled. In that case, package developers created minor versions for their packages instead to ensure that all subscribers could receive package updates.

# Provide Patch Upgrades for Non-Lightning Flow 1GP Packages that use New Order Save Behavior

You can now create patch upgrades for non-Lightning Flow 1GP packages that use New Order Save Behavior. If the subscriber uses Lightning Flow, you must still create minor versions instead of patch upgrades. Previously, patch upgrades for 1GP packages failed if the package developer had New Order Save Behavior enabled. In that case, package developers created minor versions for their packages instead to ensure that all subscribers could receive package updates.

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

# Other Changes in Core Sales Features

Expand your sales reps' view of the customer and their outreach options with a native LinkedIn Sales Navigator integration. The original territory management feature was retired. Delete your original territory management sharing records on the Release Updates page in Setup. And track ForecastingItem records that changed.

#### IN THIS SECTION:

# Connect with Customers and Prospects via LinkedIn with Our Native LinkedIn Sales Navigator Integration

Your sales reps can connect with customers in more ways with more information using the Linkedln Sales Navigator native integration. With native embedded profile components, sales reps can see Linkedln insights directly on lead, contact, opportunity, and account pages. And they can send InMails and connection requests with native Lightning actions. Sales managers can also add Linkedln InMail and connection request steps to High Velocity Sales cadences.

#### Original Territory Management Was Retired

The original territory management feature was retired. Users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management.

#### Delete Your Original Territory Management Sharing Records (Update)

This update deletes your original territory management sharing records to prevent issues in Enterprise Territory Management. Previously you contacted Salesforce Customer Support or used Metadata API to delete original territory management sharing records. This update lets you delete them on the Release Updates page in Setup.

# Attributes Added to ForecastingItem

Now that the Forecasting Item object has the getDeleted() and getUpdated() attributes, a log entry shows the Forecasting Item records that were deleted or updated during a certain period.

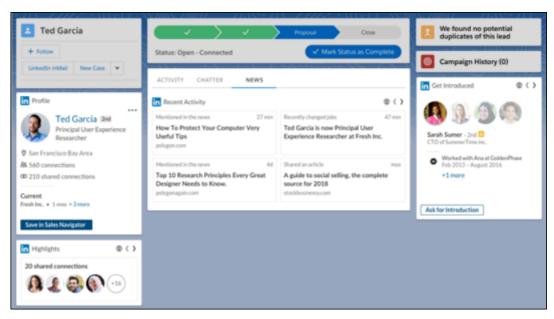
# Connect with Customers and Prospects via LinkedIn with Our Native LinkedIn Sales Navigator Integration

Your sales reps can connect with customers in more ways with more information using the LinkedIn Sales Navigator native integration. With native embedded profile components, sales reps can see LinkedIn insights directly on lead, contact, opportunity, and account pages. And they can send InMails and connection requests with native Lightning actions. Sales managers can also add LinkedIn InMail and connection request steps to High Velocity Sales cadences.

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

**Who:** This feature is available to users with Sales Navigator Team or Sales Navigator Enterprise licenses for LinkedIn Sales Navigator.

**How:** In Lightning App Builder, add the LinkedIn Sales Navigator (Native) components to lead, contact, opportunity, and account pages. Add the InMail and Connection Request Lightning actions to the same pages. Add InMail and Connection Request steps to High Velocity Sales Cadences.



Previously, Sales Navigator was only available as an AppExchange package from Linkedln. The native integration uniquely allows for deeper Linkedln Sales Navigator workflows with High Velocity Sales.

If you've already installed the AppExchange package from LinkedIn, you can still enable the native integration to use LinkedIn Sales Navigator with High Velocity Sales. The Setup page includes a summary of the features of each.

# Choosing between the LinkedIn Sales Navigator native integration and the AppExchange package? The LinkedIn Sales Navigator native integration in Salesforce offers different features than the AppExchange package. Features Native Integration AppExchange Package Lightning actions for InMails and connection requests LinkedIn profile components on lead, contact, account, and opportunity pages InMail and connection request steps in High Velocity Sales sales cadences Data validation (Not at Company flag) Support for Salesforce Classic

# Original Territory Management Was Retired

The original territory management feature was 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.

#### SEE ALSO:

*Knowledge article*: The Original Territory Management Module Will Be Retired in the Summer '21 Release Delete Your Original Territory Management Sharing Records (Update)

# Delete Your Original Territory Management Sharing Records (Update)

This update deletes your original territory management sharing records to prevent issues in Enterprise Territory Management. Previously you contacted Salesforce Customer Support or used Metadata API to delete original territory management sharing records. This update lets you delete them on the Release Updates page in Setup.

**Where:** This change applies to Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**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:** By deleting original territory management sharing records, this update eliminates unintended user access to records and resolves a known issue related to blank rows on Activities reports.

**How:** When this update is enabled, the enableRemoveTMGroupMembership field on the SharingSettings Metadata API type is set to true, and users can no longer access records based on original territory management sharing.

#### SEE ALSO:

Release Update Announcements

Original Territory Management Was Retired

Knowledge article: Migrating from Original Territory Management to Enterprise Territory Management

# Attributes Added to ForecastingItem

Now that the Forecasting Item object has the getDeleted() and getUpdated() attributes, a log entry shows the Forecasting Item records that were deleted or updated during a certain period.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Enterprise API supports Collaborative Forecasts.

# **Productivity Features**

Connect Einstein Activity Capture to your Microsoft Exchange on-premises server with a service account. Record calls with Dialer by default. Get more control of what email behavior counts as an engagement. Package builder email templates easier than before.

# IN THIS SECTION:

# Einstein Activity Capture

Use a service account with a Microsoft Exchange on-premises server. Sync events where all attendees are part of your internal domain. Easily troubleshoot connection issues. Enjoy a reorganized Einstein Activity Capture settings page.

# Dialer

You can now have Dialer calls recorded by default.

# **Email Experience**

Get more control of the email behavior that's counted as an engagement. Define IP address ranges to filter out when certain people, such as internal users, interact with an email. And you can join a pilot for choosing how to send list emails.

# **Email Templates**

Developers can package builder email templates without the Access Drag-and-Drop Content Builder user permission. Packages and change sets automatically include supported email attachments. Improved error handling makes errors visible and easy to view until the user is ready to fix them and save the template. The addition of web-safe fonts to the rich text editor lets your users make emails and email templates more visually compelling.

# Salesforce Inbox

Check out the latest improvements to Salesforce Inbox.

#### Calendar

Attendees can see the event organizer's name in their event details. Developers can create recurring events from the standard Event object. Sales reps can create monthly events that automatically start on the selected calendar date.

# **Einstein Activity Capture**

Use a service account with a Microsoft Exchange on-premises server. Sync events where all attendees are part of your internal domain. Easily troubleshoot connection issues. Enjoy a reorganized Einstein Activity Capture settings page.

#### IN THIS SECTION:

# Use a Service Account with Microsoft Exchange

If you use Microsoft Exchange Server 2019, 2016, or 2013, you can connect Einstein Activity Capture with a service account. Service accounts give you more control over which users Salesforce can access data from. Plus, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

#### Sync Internal Events

When sales reps sync their internal events between their connect account and Salesforce, they keep their Salesforce calendar and availability up to date. Plus, teams can track important internal events related to customers. Events are internal events when all attendees are part of your internal domain. Previously, internal events weren't synced between Salesforce and sales reps' connected accounts unless you made a request to Salesforce Customer Support.

# Troubleshoot Einstein Activity Capture Connection Issues More Easily

To help sales reps get up and running with Einstein Activity Capture, you can now check the status of their email and calendar connections.

#### Include Google Meet Details on Google Calendar Events

To resume including Google Meet joining details on Google Calendar events, turn on the feature from the Einstein Activity Capture settings. In September 2020, a restriction that Google made to its event API now requires this feature to include joining details on Google Calendar events that are originally created in Salesforce.

# Prevent Sensitive Information from Appearing on the Activity Timeline

To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify automated email replies and keep them private.

#### Find Einstein Activity Capture Settings Faster

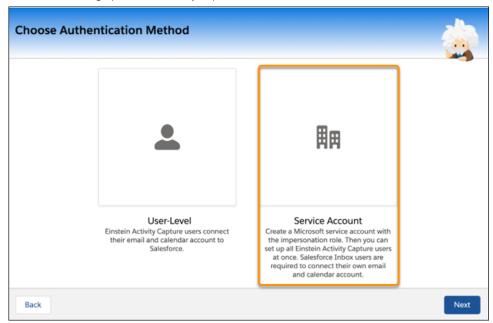
The reorganized Einstein Activity Capture settings help you quickly find what you need. Settings that apply to all users are now under the Settings tab instead of the Capture Settings tab and are organized by theme. You can still access settings that apply to specific configurations by editing a configuration.

# Use a Service Account with Microsoft Exchange

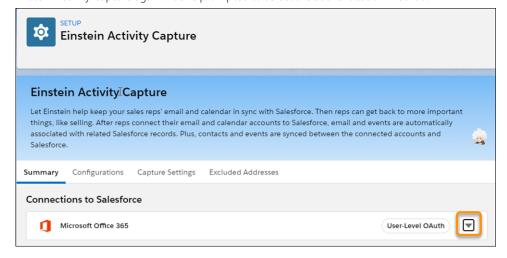
If you use Microsoft Exchange Server 2019, 2016, or 2013, you can connect Einstein Activity Capture with a service account. Service accounts give you more control over which users Salesforce can access data from. Plus, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

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

How: When setting up Einstein Activity Capture for the first time, select Service Account as the authentication method.



If you already set up Einstein Activity Capture, you can reset the feature and select a different authentication method. From the Einstein Activity Capture settings page, select Reset Einstein Activity Capture from the dropdown. After the reset process is complete, set up Einstein Activity Capture again. You're prompted to select the authentication method.





**Note**: Users in configurations that capture email data are prompted to accept the Einstein Activity Capture terms of service. Until they do so, email data isn't captured.

#### SEE ALSO:

*Salesforce Help*: Use a Service Account to Connect an Exchange Server and Einstein Activity Capture (can be outdated or unavailable during release preview)

# Sync Internal Events

When sales reps sync their internal events between their connect account and Salesforce, they keep their Salesforce calendar and availability up to date. Plus, teams can track important internal events related to customers. Events are internal events when all attendees are part of your internal domain. Previously, internal events weren't synced between Salesforce and sales reps' connected accounts unless you made a request to Salesforce Customer Support.

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

How: From the Einstein Activity Capture settings in setup, go to the Settings tab. Turn on the Sync Internal Events setting.



#### SEE ALSO:

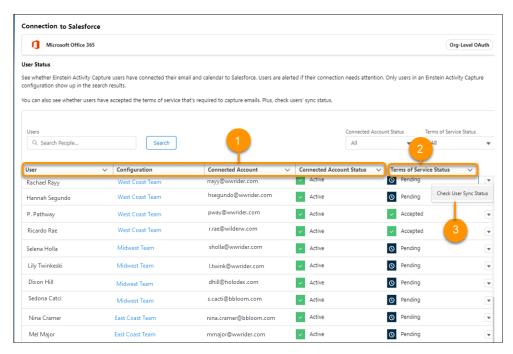
*Salesforce Help*: Considerations for Excluding Data from Einstein Activity Capture (can be outdated or unavailable during release preview)

# Troubleshoot Einstein Activity Capture Connection Issues More Easily

To help sales reps get up and running with Einstein Activity Capture, you can now check the status of their email and calendar connections.

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

Why: If sales reps have issues with Einstein Activity Capture, you can check their connections in one place.



The new User Status page shows users and their assigned configuration, the email address used to connect to Salesforce, and the connection status (1).

If you use an org-level OAuth 2.0 or a service account authentication method, you also see whether users accepted the terms of service that's required to capture emails (2). For a more detailed look at what's causing an issue, you can check a user's sync status (3).

**How:** From Setup, go to the User Status page under Einstein Activity Capture. The default view shows all Einstein Activity Capture users who are in an active configuration. To refine your results, search for a user or filter by status.

SEE ALSO:

Salesforce Help: Check Connection Status for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

# Include Google Meet Details on Google Calendar Events

To resume including Google Meet joining details on Google Calendar events, turn on the feature from the Einstein Activity Capture settings. In September 2020, a restriction that Google made to its event API now requires this feature to include joining details on Google Calendar events that are originally created in Salesforce.

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

**How:** From the Einstein Activity Capture settings in Setup, go to the Settings tab. Turn on **Include Google Meet Details on Google Events**. Then when sales reps create events in Salesforce, the details to join with Google Meet are added to the Google version of the event when the event syncs to Google Calendar.

SEE ALSO:

Salesforce Help: Sync Events with Einstein Activity Capture (can be outdated or unavailable during release preview)

# Prevent Sensitive Information from Appearing on the Activity Timeline

To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify automated email replies and keep them private.

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

**Why:** We all receive automated email notifications from external businesses. If someone creates a Salesforce contact record with an automated email address, sensitive information from that automated email address is visible to all users from the activity timeline. To enhance security, Einstein Activity Capture now attempts to identify automated email replies before they're added to the timeline and set sharing to Don't Share.

For example, if a user receives a notification from their bank that a financial statement is ready or an automated response about a password reset, the email is visible only to the recipient. The email owner can later change the sharing setting to something less restrictive.

Some automated email replies are useful to your colleagues and aren't set to private. Examples include out-of-office replies and email bounce notifications.

**How:** Einstein Activity Capture automatically filters out automated emails. But to add additional protections, we recommend that you update the Excluded Addresses list with customer domains and email addresses from the services your company uses. Services that offer human resources, payroll, or financial support for your company are good candidates to add to the Excluded List. Then, if someone creates a Salesforce contact record with the email address no-reply@confidential.tax.details.com, emails from that sender aren't added to the contact's activity timeline.

# SEE ALSO:

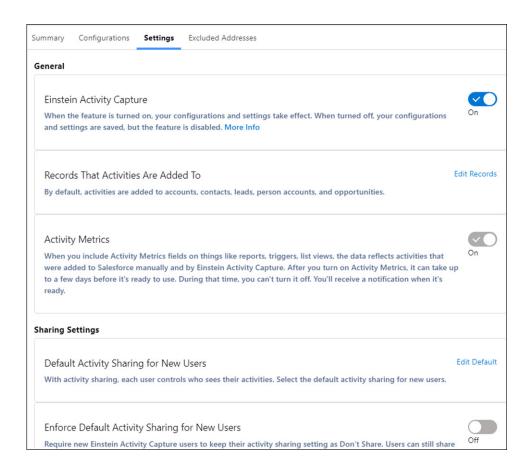
Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture (can be outdated or unavailable during release preview)

# Find Einstein Activity Capture Settings Faster

The reorganized Einstein Activity Capture settings help you quickly find what you need. Settings that apply to all users are now under the Settings tab instead of the Capture Settings tab and are organized by theme. You can still access settings that apply to specific configurations by editing a configuration.

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

**How:** In Setup, go to the Einstein Activity Capture settings page and then click the Settings tab. The tab was previously called Capture Settings.



# SEE ALSO:

Salesforce Help: Set Up Einstein Activity Capture (can be outdated or unavailable during release preview)

# Dialer

You can now have Dialer calls recorded by default.

# IN THIS SECTION:

# Record Calls by Default

You can now enable default recording for Dialer. Your users can still decide whether to record individual calls. It's up to users to comply with any privacy rules and regulations.

# Record Calls by Default

You can now enable default recording for Dialer. Your users can still decide whether to record individual calls. It's up to users to comply with any privacy rules and regulations.

**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.

**How:** To enable default recording, turn on the feature from the Recording and Consent page in Setup.



# **Email Experience**

Get more control of the email behavior that's counted as an engagement. Define IP address ranges to filter out when certain people, such as internal users, interact with an email. And you can join a pilot for choosing how to send list emails.

#### IN THIS SECTION:

#### Refine Email Open Data with IP Address Blocking

To ensure that email tracking engagement data doesn't include when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

# Select Auth Type for Email Relay

Now you can choose Auth Plain or Auth Login as the SASL mechanism to use with email relay. Previously, the authentication type was considered as Auth Plain when you enabled SMTP Auth. The selected authentication type also appears on the email relay record page in the new Auth Type column.

#### Learn More with Email Reporting

Your sales managers want answers to questions such as how effective the email outreach strategy is, which rep sends the most effective emails, and what percentage of emails are inbound vs. outbound. Use the new email messages custom report to answer those questions.

#### Add Flair to Emails with Web-Safe Fonts

Your users can add even more style and branding to emails with web-safe fonts.

# Send List Email With Your Email Account (Pilot)

Let your sales reps choose how to send their list emails. Now, reps can send list emails from Gmail, Office 365, or Microsoft Exchange. Previously, reps could send list emails via Salesforce only.

# Refine Email Open Data with IP Address Blocking

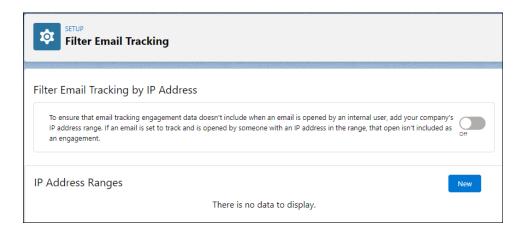
To ensure that email tracking engagement data doesn't include when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

**Where:** This update is available in Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This change also applies to High Velocity Sales, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. This change also applies to Salesforce Inbox, available for an extra cost in the same editions and at no cost in Essentials edition.



Note: If your org has Einstein Activity Capture enabled, either Inbox or High Velocity Sales must be enabled.

**How:** From Setup, in the Quick Find box, enter *Filter Email Tracking*, and then select **Filter Email Tracking**.



Enter IP address ranges at any time. To start filtering, enable the feature.





Note: Use IPv4 addresses. IPv6 addresses aren't supported for IP address filtering.

# SEE ALSO:

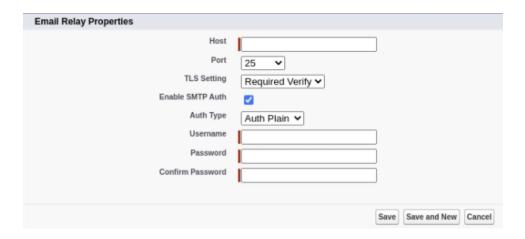
Salesforce Help: Enable Filtering for Email Tracking (can be outdated or unavailable during release preview)
Salesforce Help: Set Up IP Address Ranges for Filtering (can be outdated or unavailable during release preview)

# Select Auth Type for Email Relay

Now you can choose Auth Plain or Auth Login as the SASL mechanism to use with email relay. Previously, the authentication type was considered as Auth Plain when you enabled SMTP Auth. The selected authentication type also appears on the email relay record page in the new Auth Type column.

**Where:** This update is available in Lightning Experience and all Salesforce apps in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Email Relay Properties, use the Auth Type dropdown to select Auth Plain or Auth Login.

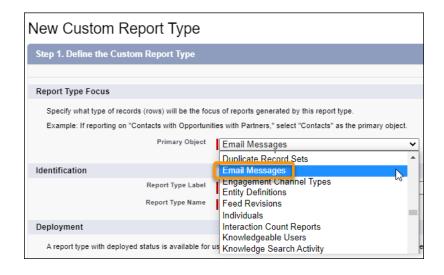


# Learn More with Email Reporting

Your sales managers want answers to questions such as how effective the email outreach strategy is, which rep sends the most effective emails, and what percentage of emails are inbound vs. outbound. Use the new email messages custom report to answer those questions.

Where: This update is available in Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

**How:** Create custom reports based on the Email Messages primary object.



Reports are available for emails only. See list email activity in activity reports.

#### SEE ALSO:

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

Salesforce Help: Set Up a Custom Report Type (can be outdated or unavailable during release preview)

IdeaExchange: Allow others to view HTML Email Status Report from emails I sent (partially delivered)

IdeaExchange: Additional fields for HTML Email Status Report

# Add Flair to Emails with Web-Safe Fonts

Your users can add even more style and branding to emails with web-safe fonts.

**Where:** This update is available in Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** The new font style options appear in these email composers:

- Global email composer
- List email composer
- Campaigns list email
- One-to-one composer on leads, contacts, accounts, and cases

The fonts also appear in Email Template Builder and Email Content Builder:

- Rich text and button components in Email Template Builder and Email Content Builder
- Template detail page (for Lightning email templates only)
- Enhanced letterheads

SEE ALSO:

Add Flair to Email Templates with Web-Safe Fonts

# Send List Email With Your Email Account (Pilot)

Let your sales reps choose how to send their list emails. Now, reps can send list emails from Gmail, Office 365, or Microsoft Exchange. Previously, reps could send list emails via Salesforce only.

Where: This update is available in Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

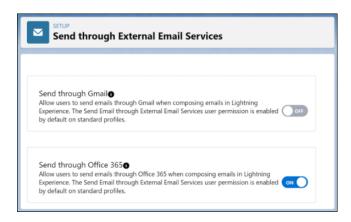
You can provide feedback and suggestions for sending list email through external services in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

Use of this feature is subject to the Salesforce Acceptable Use Policy.

**Who:** This update is available for Gmail, Office 365, and Microsoft Exchange customers. If you use Microsoft Exchange, you must use Inbox to send list emails through a connected account. Inbox is available with an Inbox, High Velocity Sales, or Sales Cloud Einstein license.

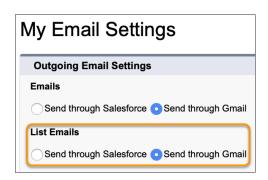
**Why:** Sending list emails through Gmail, Office 365, or Microsoft Exchange ensures that the email looks like it's been sent directly from a user instead of by email automation. Recipients are more likely to open an email that looks like it's been sent directly. Also, list emails are in the user's sent folder, so the send history is intact.

**How:** For Gmail and Office 365, go to Setup. In the Quick Find box, enter *Send through External Email Services*, and then select **Send through External Email Services**.



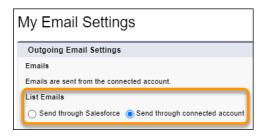
For Microsoft Exchange, assign an Inbox license to users.

Then your users can choose their preferred setting for list emails. Users can open their personal settings any time to access this setting. For Gmail and Office 365 users:





For Microsoft Exchange users with an Inbox license:



# SEE ALSO:

Salesforce Help: Send List Email in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Send Email from Salesforce with Gmail™ or Office 365™ (can be outdated or unavailable during release preview)

# **Email Templates**

Developers can package builder email templates without the Access Drag-and-Drop Content Builder user permission. Packages and change sets automatically include supported email attachments. Improved error handling makes errors visible and easy to view until the user is ready to fix them and save the template. The addition of web-safe fonts to the rich text editor lets your users make emails and email templates more visually compelling.

#### IN THIS SECTION:

# Let Admins Create Managed Packages Without Email Template Builder Permissions

You can create a managed package that includes email template builder templates without the Access Drag-and-Drop Content Builder user permission. Previously, this permission was required for admins to build managed packages with email template builder templates.

#### Include Email Template Attachments Automatically in Packages and Change Sets

Now your users can provide supporting content for Lightning email templates, including email templates created in Email Template Builder, when they're packaged or added to a change set. Template attachments of supported file types are now automatically added to a package or change set. Previously, users were required to resave existing templates before its attachments were available in a package or change set. Attachments include white papers, ebooks, and quote templates.

# Fix Email Builder Templates Easily with Improved Error Handling

Updated error popovers make it easier for your users to identify which components to fix before they can save an email template created in Email Template Builder or content created in Email Content Builder. The error messages remain visible so your users can continue working on the template and fix errors when they're ready to.

# Add Flair to Email Templates with Web-Safe Fonts

Your users can add even more style and branding to email templates with web-safe fonts.

#### Control When to Close HTML Tags

To close HTML tags, now you can type </ when using the HTML component in Email Template Builder and Email Content Builder. The rest of the closing tag is completed automatically. Previously, the closing tag appeared when you entered the opening tag.

# Let Admins Create Managed Packages Without Email Template Builder Permissions

You can create a managed package that includes email template builder templates without the Access Drag-and-Drop Content Builder user permission. Previously, this permission was required for admins to build managed packages with email template builder templates.

Where: This change applies to Lightning Experience in Developer Edition only.

SEE ALSO:

Salesforce Help: Select Who Can Work in Email Template Builder (can be outdated or unavailable during release preview)
Salesforce Help: Component Behavior in Packages (can be outdated or unavailable during release preview)

# Include Email Template Attachments Automatically in Packages and Change Sets

Now your users can provide supporting content for Lightning email templates, including email templates created in Email Template Builder, when they're packaged or added to a change set. Template attachments of supported file types are now automatically added to a package or change set. Previously, users were required to resave existing templates before its attachments were available in a package or change set. Attachments include white papers, ebooks, and quote templates.

**Where:** This change to packaging applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions. This change to change sets applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions. Creating a managed package is supported in Developer Edition only.

SEE ALSO:

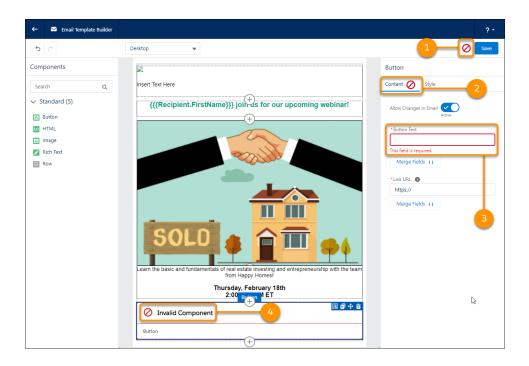
*Salesforce Help*: Supported File Types for Lightning Email Attachments in Packaging and Change Sets (can be outdated or unavailable during release preview)

# Fix Email Builder Templates Easily with Improved Error Handling

Updated error popovers make it easier for your users to identify which components to fix before they can save an email template created in Email Template Builder or content created in Email Content Builder. The error messages remain visible so your users can continue working on the template and fix errors when they're ready to.

**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:** The error icon (1) tells the user that the email template or content has an error. Click the icon to see a summary of all the errors in a template. Click an individual error within the summary to go to the error in the template.



When a user selects a component with an error, the tab (2) and field (3) with the error are indicated in the property panel. On the template builder canvas, components with errors (4) are indicated.

# Add Flair to Email Templates with Web-Safe Fonts

Your users can add even more style and branding to email templates with web-safe fonts.

**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:** The new font style options appear in Email Template Builder and Email Content Builder:

- Rich text and button components in Email Template Builder and Email Content Builder
- Template detail page (for Lightning email templates only)
- Enhanced letterheads

The fonts also appear in these email composers:

- Global email composer
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- Campaigns list email
- One-to-one composer on leads, contacts, accounts, and cases

SEE ALSO:

Add Flair to Emails with Web-Safe Fonts

# Control When to Close HTML Tags

To close HTML tags, now you can type </ when using the HTML component in Email Template Builder and Email Content Builder. The rest of the closing tag is completed automatically. Previously, the closing tag appeared when you entered the opening tag.

**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.

# Salesforce Inbox

Check out the latest improvements to Salesforce Inbox.

#### IN THIS SECTION:

#### Salesforce Inbox Mobile

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

# Salesforce Inbox Mobile

Salesforce Inbox integrates your email and calendar with Salesforce so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- Inbox Mobile for iOS
- Inbox Mobile for Android

To learn about the latest features and enhancements in Inbox desktop, see the Outlook Integration, Gmail Integration, and Email Experience sections of the Salesforce release notes.

#### SEE ALSO:

Outlook® Integration
Gmail™ Integration
Email Experience

# Calendar

Attendees can see the event organizer's name in their event details. Developers can create recurring events from the standard Event object. Sales reps can create monthly events that automatically start on the selected calendar date.

# IN THIS SECTION:

# See Event Organizer Names on Attendee Events

When an attendee views their event details, they can see the organizer's name. Sales reps can contact or follow up with their event organizer. Previously, attendee event details didn't show the organizer.

# Create Recurring Events from the API

Developers can create recurring events from the standard Event object for Lightning Experience. Previously, recurring events could be deleted but not created in the API.

# Monthly Events Automatically Start on Today's Date

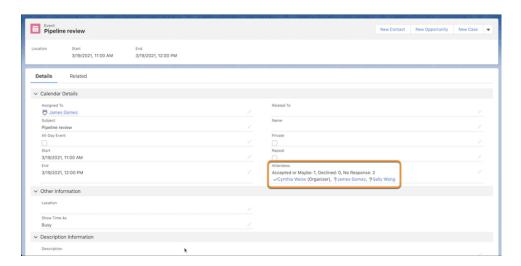
Sales reps can create repeating monthly events that automatically start on the calendar date selected when choosing an event creation date or the current date. When a rep creates a monthly recurring event, events are automatically scheduled on the same numerical day as the start date in the months that follow. Previously, monthly recurring events automatically started and repeated on the first of the month, regardless if a calendar date was selected.

# See Event Organizer Names on Attendee Events

When an attendee views their event details, they can see the organizer's name. Sales reps can contact or follow up with their event organizer. Previously, attendee event details didn't show the organizer.

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

**How:** If you already have the attendee field added to your event layout, no setup is required. Otherwise, from Setup, in the Quick Find box, enter *Object*, and then click *Object Manager*. Select the **Event** object, and navigate to the event layout page. Add the Attendees field and save your changes. On the event details page, the Attendees field shows the event organizer.



# SEE ALSO:

Salesforce Help: Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App (can be outdated or unavailable during release preview)

# Create Recurring Events from the API

Developers can create recurring events from the standard Event object for Lightning Experience. Previously, recurring events could be deleted but not created in the API.

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

#### SEE ALSO:

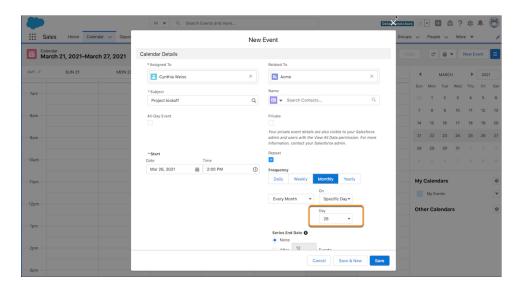
Object Reference: Salesforce and Lightning Platform Event (can be outdated or unavailable during release preview)
New and Changed Objects

# Monthly Events Automatically Start on Today's Date

Sales reps can create repeating monthly events that automatically start on the calendar date selected when choosing an event creation date or the current date. When a rep creates a monthly recurring event, events are automatically scheduled on the same numerical day as the start date in the months that follow. Previously, monthly recurring events automatically started and repeated on the first of the month, regardless if a calendar date was selected.

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

**How:** This feature is available automatically if recurring events are enabled in Lightning Experience. If the current date is March 26, or you click to create an event on March 26 and then select a monthly frequency, the Day field automatically populates the day 26.



# Salesforce Maps

Increase adoption of and adherence to company policies and safety protocols. Plot data from proprietary and third-party systems on the map, and plan territories that align with leadership's business targets.

#### IN THIS SECTION:

# Salesforce Maps

Help field reps adopt and adhere to your company's policies and safety protocols. Plot data from proprietary and third-party systems, and specify which actions appear in pop-ups for markers on the map.

# Salesforce Maps Advanced

Optimize visits and routes even when appointments from other calendars create conflicts. Prevent events from appearing that you don't want to show on the schedule.

# Salesforce Maps Territory Planning

Design territories based on your leadership's targets when you apply a top-down approach. Give managers authority to design specific areas in territories. And update units with the latest Salesforce data in cloned data sets.

# Salesforce Maps

Help field reps adopt and adhere to your company's policies and safety protocols. Plot data from proprietary and third-party systems, and specify which actions appear in pop-ups for markers on the map.

# IN THIS SECTION:

# Automate Safety Protocols for Customer Visits

Request approvals from managers for on-site visits. Prompt field reps to review and respond to your company's safety requirements for minimizing the risk of exposure to COVID-19.

# Map Customer Data from Proprietary and Third-Party Systems

Schedule customer visits in Salesforce Maps using data that you store outside Salesforce. Connect to your own data sources through Salesforce Connect. On the map, plot data from multiple sources such as Salesforce and proprietary systems. Plan and schedule visits using any of that data.

# Specify Which Custom Actions Appear for Each Base Object

Determine the custom actions that your reps can take for each base object in Salesforce Maps. For example, you set up custom actions so that your reps can update details on accounts and stages on opportunities. To give your reps a simplified view of the custom actions available in pop-ups, show them just the ones that apply to each plotted layer.

# Map New Shape Layers

Discover the shape layers available in Salesforce Maps. Plot specific areas using new geographic boundaries, and grow your business using the latest public data.

#### Other Enhancements in Salesforce Maps

Stay updated on name changes to labels for privacy settings. Set limits for markers that appear on the map when plotting data from external sources.

# **Automate Safety Protocols for Customer Visits**

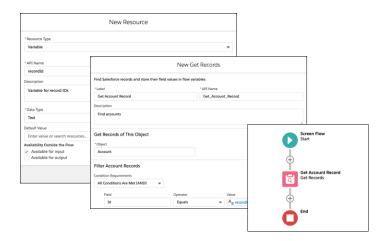
Request approvals from managers for on-site visits. Prompt field reps to review and respond to your company's safety requirements for minimizing the risk of exposure to COVID-19.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Help reps adopt and adhere to your company's processes and safety protocols using flows, which you integrate with Salesforce Maps. You choose whether to trigger flows as your reps check into or out of their customer visits. Managers can approve customers for on-site visits and give reps indicators that show which customers to schedule appointments with.

**How:** Identify safety protocols that you want your reps to follow. For example, when your reps schedule visits for their accounts, prompt them to sign off on safety items that appear in a task when they arrive at customer visits.

In Salesforce Settings, you create checkbox fields for every safety item in the Activity object and add the fields to the Activity page layout. You then build a flow that gets record details from markers on the map and creates tasks that include the safety items.



Then in Salesforce Maps Settings, you create a custom action button that starts the flow.

SEE ALSO:

Salesforce Help: Keep Field Reps Safe During Customer Visits

# Map Customer Data from Proprietary and Third-Party Systems

Schedule customer visits in Salesforce Maps using data that you store outside Salesforce. Connect to your own data sources through Salesforce Connect. On the map, plot data from multiple sources such as Salesforce and proprietary systems. Plan and schedule visits using any of that data.

**Where:** This change applies to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** Connect to your sources using Salesforce Connect, and then create base objects that represent the data that you want to plot on the map in Salesforce Maps.

SEE ALSO:

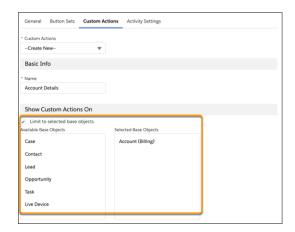
Salesforce Help: Work with External Data Sources (can be outdated or unavailable during release preview)

# Specify Which Custom Actions Appear for Each Base Object

Determine the custom actions that your reps can take for each base object in Salesforce Maps. For example, you set up custom actions so that your reps can update details on accounts and stages on opportunities. To give your reps a simplified view of the custom actions available in pop-ups, show them just the ones that apply to each plotted layer.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Create or edit a custom action in Salesforce Maps Settings. Then limit the custom action to the base objects that you select.



# Map New Shape Layers

Discover the shape layers available in Salesforce Maps. Plot specific areas using new geographic boundaries, and grow your business using the latest public data.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Country	Shape Layer
Belarus	Voblast
Belize	District
Benin	Departement
Burundi	Province
Cameroon	Region
Canada	County
Central African Republic	Prefecture
Comoros	Island
Cote d'Ivoire	District
Cuba	Provincia
Djibouti	Region
Dominican Republic	Provincia
Egypt	Mohafaza
El Salvador	Departamento
Ethiopia	Region
	Zone
Faroe Islands	Sysla
Israel	Mahoz
Jamaica	City/District
	Parish
Jordan	Governorate
	Municipality
	Postal Code
Kazakhstan	Audani
	Oblisi
Kenya	County
	Sub-County
Kuwait	Governorate

Country	Shape Layer
	Postal Code
	Neighbourhood
Kyrgyzstan	City
	County
Latvia	Postal Code
Lebanon	Caza
	Mohafazah
Lesotho	Council
	District
Liberia	County
	District
Libya	City
	District
Russia	Okrug
Thailand	Postal Code
Trinidad and Tobago	Island
United Arab Emirates	Emirate

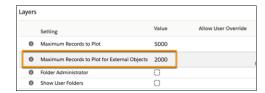
# Other Enhancements in Salesforce Maps

Stay updated on name changes to labels for privacy settings. Set limits for markers that appear on the map when plotting data from external sources.

**Where:** These changes apply to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The privacy setting label for user tracking isn't specific to a single tracking technology. **Pendo Enabled** changed to **User Tracking Enabled** and **Pendo Disabled** changed to **User Tracking Disabled**.

We also added a setting to permission groups that limits the markers you can plot from external sources onto the map. Plot as many as 2,000.



# Salesforce Maps Advanced

Optimize visits and routes even when appointments from other calendars create conflicts. Prevent events from appearing that you don't want to show on the schedule.

# IN THIS SECTION:

# Plan Visits and Routes When Appointments Overlap

Schedule appointments even when calendars from other systems block time slots in Salesforce Maps Advanced. Receive warnings of overlapping appointments and schedule around them.

# Prevent Certain Events from Appearing on Schedules

Reduce the noise and show only the things that matter when you schedule appointments. Flag private and all-day events that you don't want to schedule. Optimize schedules even when calendars from other systems block time slots in Salesforce Maps Advanced. Receive warnings of overlapping appointments and schedule around them.

# Other Enhancements in Salesforce Maps Advanced

More flexible visit plans help you achieve your business goals. Increase visits along higher-density routes, get optimization results faster, and optimize rep visit planning.

# Plan Visits and Routes When Appointments Overlap

Schedule appointments even when calendars from other systems block time slots in Salesforce Maps Advanced. Receive warnings of overlapping appointments and schedule around them.

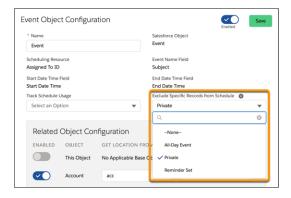
**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

# Prevent Certain Events from Appearing on Schedules

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**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** From Salesforce Maps Settings, select **Routes & Schedule**. Then select the types of events that you want to prevent from appearing on schedules.



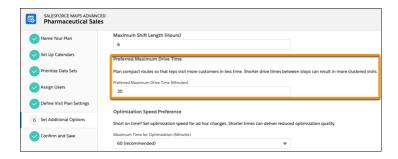
# Other Enhancements in Salesforce Maps Advanced

More flexible visit plans help you achieve your business goals. Increase visits along higher-density routes, get optimization results faster, and optimize rep visit planning.

**Where:** These changes apply to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

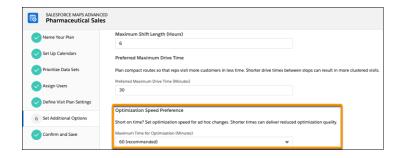
# **Visit More Customers in Less Time with Compact Routes**

Increase your reps' customer visits when you set recommended drive times between stops. Reps plan their days so that they spend less time behind the wheel and more time building relationships.



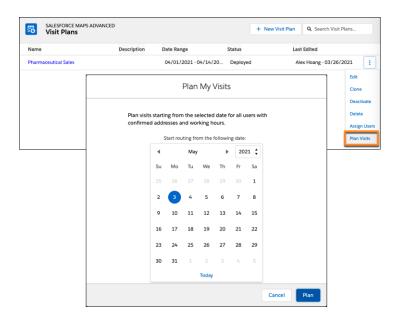
# Optimize Faster for Ad Hoc Changes on the Road

Run optimizations faster for when reps are on the road. Use the standard 60-minute maximum to get the best results. Shorter times can reduce optimization.



# **Optimize Visits for the Future**

Start the optimization process so that it's effective today or on a future date for all your reps. Plan visits starting from the date you select.



# Salesforce Maps Territory Planning

Design territories based on your leadership's targets when you apply a top-down approach. Give managers authority to design specific areas in territories. And update units with the latest Salesforce data in cloned data sets.

#### IN THIS SECTION:

#### Plan Territories That Align with Leadership's Targets

Keep sales and service management aligned with leadership's targets when you plan territories from the top-down in Salesforce Maps Territory Planning. That way, you design territories based on your company's overall business strategies, starting with the largest areas such as regions and districts.

#### Grant Access to Areas in Alignments

Keep managers focused on designing territories in the areas that leadership assigns to them in Salesforce Maps Territory Planning. Ensure privacy among your managers when you provide everyone access to only their respective areas.

#### Copy and Update Data Sets

Practice designing territories using copies of a data set. Or validate the effectiveness of your alignments by comparing them with ones that you create using refreshed data in Salesforce Maps Territory Planning. When you clone data sets and any of their alignments, you create copies of them that can include the latest data from your sources.

## Map New Container Sets

Discover the container sets available in Salesforce Maps Territory Planning. When you create data sets and plan territories, select specific areas using new geographic territory boundaries such as postal codes.

#### Other Enhancements in Salesforce Maps Territory Planning

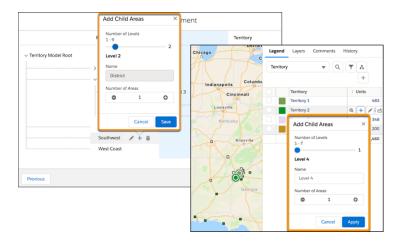
Change multiple unit assignments at once, and import attributes without fear of any erroneous data failing the whole import.

## Plan Territories That Align with Leadership's Targets

Keep sales and service management aligned with leadership's targets when you plan territories from the top-down in Salesforce Maps Territory Planning. That way, you design territories based on your company's overall business strategies, starting with the largest areas such as regions and districts.

**Where:** This change applies to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** Starting with the largest areas in your territory model, divide regions and districts into subordinate territories. Then create your alignments or adjust them from the map.



Instead of distributing units equally, distribute them in a way that helps your regions and districts reach their goals. To support that territory planning method, you get flexibility to:

- Start with regions that you optimize, and then divide them into smaller areas.
- Adjust an alignment's levels directly on the map. For example, you can divide a region into districts and districts into territories. Territory Planning assigns all units within the region to its first territory. To distribute those units among all territories, you later optimize the alignment.

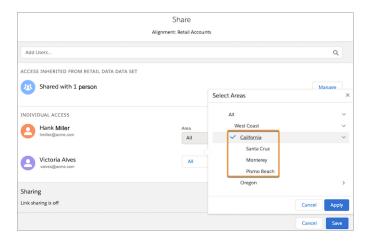
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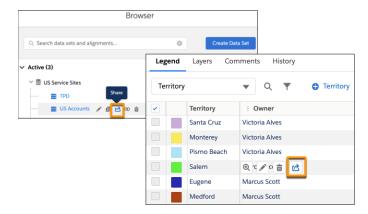
**Where:** This change applies to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** When you give managers access to specific areas, you choose whether to let them control the creation and management of it and its subordinate areas. That way, you:

- Delegate territory design responsibilities and authorize managers to determine the structure of their areas.
- Ensure that every manager plans territories for only their respective areas.
- Surface essential data and layers in the alignment's map legend for the areas that you grant access to. Doing so encourages everyone to work toward the same goals.



**How:** Give access to specific areas of an alignment when you share them from your active alignments list, the map legend, and the territory model editor.



## Copy and Update Data Sets

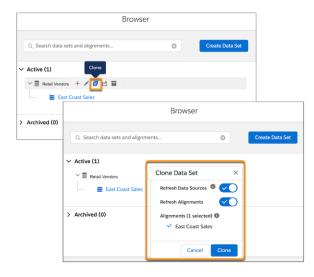
Practice designing territories using copies of a data set. Or validate the effectiveness of your alignments by comparing them with ones that you create using refreshed data in Salesforce Maps Territory Planning. When you clone data sets and any of their alignments, you create copies of them that can include the latest data from your sources.

**Where:** This change applies to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Create sandbox environments for sales and service managers who want to work with territory data and avoid affecting the original data set and its alignments. When you clone data sets, you choose whether to update all data sources. Updating the data sources reruns the reports and queries for the cloned data set. That way, you:

- Identify what's working and what isn't by comparing attributes in original alignments with the refreshed ones.
- Respond to requests from leadership to integrate the latest data into your territory model.
- Account for any changes and capture new business reflected in Salesforce resulting from, for example, marketing campaigns and product releases.
- Publish alignments that include the most up-to-date units.

How: To see the latest data in your data set whenever you make changes, click Clone next to the data set.



*IdeaExchange*: Add Data Set Refresh Button

## Map New Container Sets

Discover the container sets available in Salesforce Maps Territory Planning. When you create data sets and plan territories, select specific areas using new geographic territory boundaries such as postal codes.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and mobile for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Country	Container Set
Belize	District
Benin	Departement
Bermuda	Postal Code
Bolivia	Provincia
	Departamento
Bosnia And Herzegovina	Region
	Postal Code
	Kanton
Burundi	Province
Cameroon	Region
Cayman Islands	Postal Code

Country	Container Set
Central African Republic	Prefecture
Chile	Postal Code
Comoros	Island
Cote d'Ivoire	Region
	District
Cuba	Provincia
Djibouti	Region
El Salvador	Departamento
Equatorial Guinea	Provincia
Eritrea	Sub-Region
	Region
Estonia	Region
	Postal Code
Israel	Postal Code
	Mahoz

## Other Enhancements in Salesforce Maps Territory Planning

Change multiple unit assignments at once, and import attributes without fear of any erroneous data failing the whole import.

**Where:** These changes apply to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Save time assigning units in containers, and identify and fix errors when importing attributes.

#### Assign Units in a Container to Its Territory

Ensure that all unlocked units in a container belong to their rightful owner. Territory Planning lets you assign units in a container to its assigned territory.

#### Added Flexibility for Importing Supplemental Data

Import attributes even when some data generates errors because it doesn't match what's already in Territory Planning. Errors appear in a .csv log file, which you can download. Fix any errors, then import the file.

Update unit assignments using data from outside sources when you create data sets and alignments.

#### **Specify Which Salesforce Field Represents Unit Names**

Select the field that you want to populate for unit names when you create data sets.

# Salesforce Meetings

Reps can now take more actions and receive more insights to address customer concerns without leaving Salesforce Meetings. Microsoft Teams users can add the Meeting Digest within Teams.

#### IN THIS SECTION:

#### Take Action on Attendee Details Without Leaving the Meeting Digest

Help your reps stay focused on meeting prep with more actions available in the attendee list. In Meeting Digest, reps can update attendee details, start emails, or add new records to Salesforce.

#### Get More Insights to Keep Deals Moving Forward

To help meeting organizers address customer concerns and to better prepare for meetings, the Meeting Digest now includes insights into the highest priority cases and outstanding customer requests. Plus, after a meeting is over, reps receive helpful reminders in the Meeting Digest about scheduling follow-up meetings, quick actions to send emails to the internal team and all the attendees, and insights into outstanding requests.

#### Add Components to Optimize the Meeting Digest

To make using the Meeting Digest more flexible, the new Salesforce Meetings event record page layout includes a column where you can add other components. If Salesforce Meetings is enabled and you don't customize the event record page, it uses the new default page. Use Lightning App Builder to add other standard and custom components that your reps use when viewing the event record.

#### Get Zoom Integration Features with Salesforce Meetings

Zoom Integration features are now available for Salesforce Meetings users when Einstein Activity Capture is enabled. Capturing data about reps' video calls collects valuable metadata for insights into each Zoom meeting. Plus, reps who use Salesforce Inbox can generate links to Zoom meetings when they schedule meetings using Insert Availability.

### Add the Meeting Digest to a Meeting In Microsoft Teams

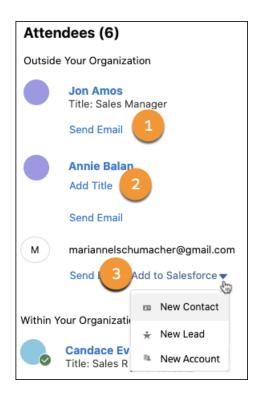
Your reps working in Microsoft Teams can add the Meeting Digest as a custom tab to a Teams meeting. With access in Teams, reps can review and prepare for meetings where they work, access the same related-record details, take notes, and ensure that record information stays up to date in Salesforce.

## Take Action on Attendee Details Without Leaving the Meeting Digest

Help your reps stay focused on meeting prep with more actions available in the attendee list. In Meeting Digest, reps can update attendee details, start emails, or add new records to Salesforce.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**How:** While reviewing the Meeting Digest, reps can launch the Lightning Email composer to draft and send an email to an attendee (1). The email composer populates with the attendee's email address and the record that's related to the meeting. The email is logged to the record related to the meeting. Reps can add an attendee's title if that detail is missing from their Salesforce record (2). If the attendee doesn't have a matching Salesforce record, reps can choose to create a contact, lead, or account (3).



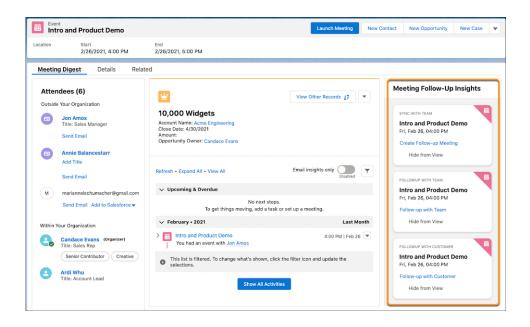
Salesforce Help: Meeting Preparation and Follow-Up With the Meeting Digest (can be outdated or unavailable during release preview)

# Get More Insights to Keep Deals Moving Forward

To help meeting organizers address customer concerns and to better prepare for meetings, the Meeting Digest now includes insights into the highest priority cases and outstanding customer requests. Plus, after a meeting is over, reps receive helpful reminders in the Meeting Digest about scheduling follow-up meetings, quick actions to send emails to the internal team and all the attendees, and insights into outstanding requests.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**Why:** All insights for a meeting appear in the Meeting Insights area of the Meeting Digest. The High Priority Cases insight includes cases associated with the related record's account, external contacts, and external email addresses. Outstanding requests include emails from leads or contacts who are attendees in the meeting. After the meeting ends, the insights are specific to follow-up actions.



Salesforce Help: Meeting Preparation and Follow-Up With the Meeting Digest (can be outdated or unavailable during release preview)

# Add Components to Optimize the Meeting Digest

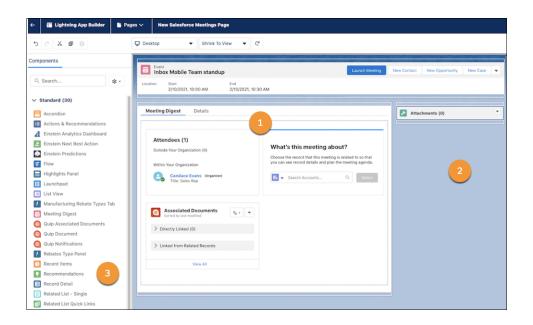
To make using the Meeting Digest more flexible, the new Salesforce Meetings event record page layout includes a column where you can add other components. If Salesforce Meetings is enabled and you don't customize the event record page, it uses the new default page. Use Lightning App Builder to add other standard and custom components that your reps use when viewing the event record.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**How:** Using Lightning App Builder, create a record page for the Event object and clone the Event Page Default for Salesforce Meetings page.



The page includes the Meeting Digest component in the widest area (1) and a related list that shows event record attachments in the smaller area (2). Add standard and custom components (3) above or below the Meeting Digest or in the column next to it.



Salesforce Help: Lightning App Builder (can be outdated or unavailable during release preview)
Salesforce Help: Set Up Salesforce Meetings (can be outdated or unavailable during release preview)

## Get Zoom Integration Features with Salesforce Meetings

Zoom Integration features are now available for Salesforce Meetings users when Einstein Activity Capture is enabled. Capturing data about reps' video calls collects valuable metadata for insights into each Zoom meeting. Plus, reps who use Salesforce Inbox can generate links to Zoom meetings when they schedule meetings using Insert Availability.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions when Salesforce Meetings is available and Einstein Activity Capture is enabled.

**How:** Ensure that Salesforce Meetings is available and that Einstein Activity Capture is enabled. Then, from Setup, in the Quick Find box, enter *Video*, and then select **Zoom Video Setup**. After completing the setup, reps are prompted to connect their Video accounts.



**Note**: Data captured during Zoom meetings is collected and available in the video record in Salesforce. With the addition of Einstein Conversation Insights, a feature outside of Salesforce Meetings, users can play call recordings from the video call record and see call details.

#### SEE ALSO:

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

# Add the Meeting Digest to a Meeting In Microsoft Teams

Your reps working in Microsoft Teams can add the Meeting Digest as a custom tab to a Teams meeting. With access in Teams, reps can review and prepare for meetings where they work, access the same related-record details, take notes, and ensure that record information stays up to date in Salesforce.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Performance and Unlimited editions.

When: Adding the Meeting Digest in Microsoft Teams is available with the Microsoft Teams Integration later in the Summer '21 release.

**Who:** This feature is available to Microsoft Teams Integration users if they have access to Salesforce Meetings and their events are synched using Einstein Activity Capture. This feature is available in Microsoft Teams on desktop.

**How:** The first time a Microsoft Teams user pins Salesforce Meetings in Teams, they're asked to connect their Teams account to Salesforce. After connecting their account, if a meeting in Teams matches an event that's synched to Salesforce using Einstein Activity Capture, the event organizer can pin the Salesforce Meetings to the meeting in Teams. Other attendees currently can't pin Salesforce Meetings.

All meeting attendees can see the pinned tab in Teams. But only attendees who have access to the matching event record in Salesforce can see and interact with Salesforce Meetings inside the tab.

#### SEE ALSO:

Bring Salesforce and Microsoft Teams Together (Generally Available)

# **Einstein Conversation Insights**

Einstein Conversation Insights is now available to sales users without the High Velocity Sales product. And service agents can use the product's coaching features with new service-related insights. Your users can also leave Chatter comments on call segments, and we're rolling out a bevy of features for video calls.

Einstein Conversation Insights doesn't record your calls. You connect it with your recording system such as Sales Dialer, Service Cloud Voice, 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:

#### Use Conversation Insights Without High Velocity Sales

High Velocity Sales isn't required for users to take advantage of Conversation Insights features. The tools are now available as a standalone product.

#### Use Conversation Insights with Service Agents

Service agents and their managers can now take advantage of all the coaching features already available for sales reps. What's more, managers can access insights available exclusively for service users, such as customer dissatisfaction or attrition risk.

#### Add Service Cloud Voice as a Conversation Insights Recording Provider

Service Cloud Voice with Amazon Connect is now a supported recording provider for sales and service calls.

#### Comment on Call Segments

To highlight part of a customer conversation, Conversation Insights users can now comment on relevant sections of calls with Chatter.

#### Share Video Calls

Managers and sales reps can share video calls with users and groups who can benefit from watching video call recordings. Video calls can provide insights into successful sales techniques and customer relationships.

#### Make Observations on Video Records with Chatter

Note important observations about video calls in the call recording Chatter feed. Notes stay with the recording so sales reps can refer to any insights later on. Sales reps and managers can comment on video call recordings using the Chatter feed.

#### Match Video Call Participants with Their Records

Contacts, leads, person accounts, and users who attend video calls are automatically listed on call recordings. Sales reps have more time to focus on important details during calls instead of worrying about tracking participants manually. Plus, participant's names are linked to their record pages and compact layouts are displayed on hover.

#### Add Video Calls to Collections

Call collections highlight successful sales video calls. Now you can archive video calls in collections to train new sales reps or review sales team highlights.

## Use Conversation Insights Without High Velocity Sales

High Velocity Sales isn't required for users to take advantage of Conversation Insights features. The tools are now available as a standalone product.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

**How:** Einstein Conversation Insights is available separately from High Velocity Sales. For access to sales insights, use Einstein Conversation Insights for Sales. For access to service insights, use Einstein Conversation Insights for Service.

Existing High Velocity Sales users with access to Einstein Conversation Insights have access to sales insights only.

# Use Conversation Insights with Service Agents

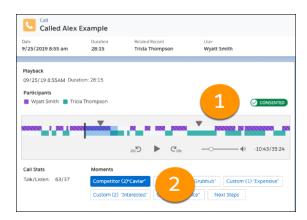
Service agents and their managers can now take advantage of all the coaching features already available for sales reps. What's more, managers can access insights available exclusively for service users, such as customer dissatisfaction or attrition risk.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to users with the Conversation Insights for Service permission set.

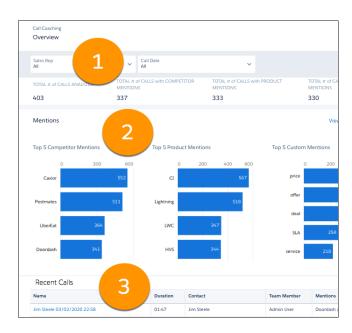
**Why:** Conversation Insights for Service has a set of automatic service-related insights that are specific to service use cases. These insights include mentions related to customer escalation, attrition risk, payments, and the longest speaking turn for the agent and customer. Automatic insights related to sales, such as next steps and trending terms are not included.

Use the coaching features available for sales reps and their managers for service agent use cases. Play conversation recordings to gain visibility into mentions of competitors, products, and custom keywords.



From voice call records, managers can play call recordings and see call details, including the talk-to-listen ratio. The different colors show the participants on the call. Jump to different mentions in the call from the player (1). Click different mentions (2) to highlight and jump to specific areas of the call.

Managers can also see reports and dashboards about different insights.



From the Overview page, managers can filter by service agent and call date (1), and review reports of top mentions based on role hierarchy (2). The Overview page also features links to recordings in the Recent Calls table (3). These recordings are the calls most recently made by your team.

#### SEE ALSO:

Salesforce Help: Compare Conversation Insights for Sales and Service (can be outdated or unavailable during release preview)

# Add Service Cloud Voice as a Conversation Insights Recording Provider

Service Cloud Voice with Amazon Connect is now a supported recording provider for sales and service calls.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

**How:** Add Amazon Connect as a recording provider from General Settings under Conversation Insights in Setup.

# **Comment on Call Segments**

To highlight part of a customer conversation, Conversation Insights users can now comment on relevant sections of calls with Chatter.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to users with access to Einstein Conversation Insights for Service.

**How:** Conversation Insights users can add comments to specific parts of calls by clicking the gray bar in a recording's timeline. The comment is tied to a specific timestamp at first, but users can edit the end time to comment on a portion of the call.



The comment appears as a popover on the timeline and on the record's Chatter feed. As with other Chatter posts, users can mention others to notify them about important updates. Click **Go to Comment** to queue the related section of the recording.

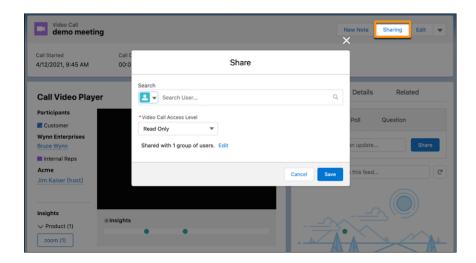
## **Share Video Calls**

Managers and sales reps can share video calls with users and groups who can benefit from watching video call recordings. Video calls can provide insights into successful sales techniques and customer relationships.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: Sales reps and their managers can share calls with other users and groups who have access to Einstein Conversation Insights.

**How:** From the video record page, reps and their managers can click **Sharing**. In the share window, they can select the users, roles, or public group to share with. Then, they can set the video call access level and save it. Calls can also be unshared by clicking **Edit** from this window.

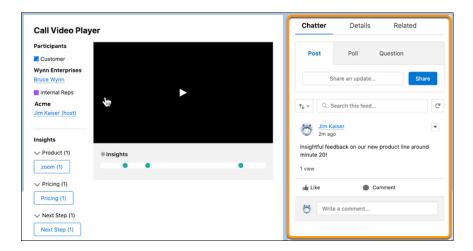


## Make Observations on Video Records with Chatter

Note important observations about video calls in the call recording Chatter feed. Notes stay with the recording so sales reps can refer to any insights later on. Sales reps and managers can comment on video call recordings using the Chatter feed.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

How: Reps can add and search for comments in the Chatter feed on any video call.

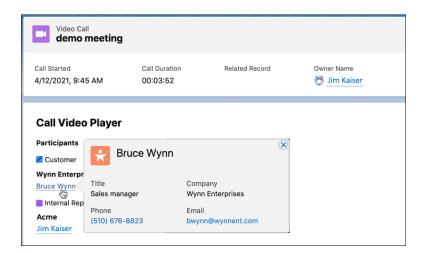


# Match Video Call Participants with Their Records

Contacts, leads, person accounts, and users who attend video calls are automatically listed on call recordings. Sales reps have more time to focus on important details during calls instead of worrying about tracking participants manually. Plus, participant's names are linked to their record pages and compact layouts are displayed on hover.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

How: To see record details for a video call participant, hover over their name in the participant list.

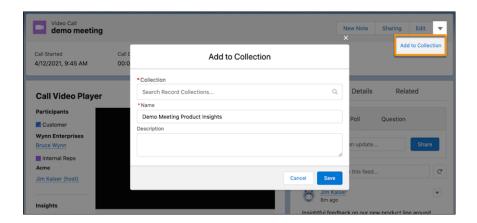


## Add Video Calls to Collections

Call collections highlight successful sales video calls. Now you can archive video calls in collections to train new sales reps or review sales team highlights.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

**How:** From the video record page, select **Add to Collection** from the page actions dropdown. Then, search the collection name or create a collection and then save it.



# **High Velocity Sales**

Report on engagement for leads, contacts, users, and sales cadences. Add LinkedIn steps to sales cadences and see engagement data on sales cadence pages.

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:

#### Report on Engagement for Leads, Contacts, Users, and Sales Cadences

New custom report types and sample reports let sales managers see who engages with emails and calls and when they engage with them. Daily and monthly reports show engagement data for leads, contacts, and users. A monthly report shows engagement for sales cadences.

#### Sales Cadences

Add LinkedIn InMail and connection request steps to sales cadences, and see engagement data for each step, email template, and call script on sales cadence pages.

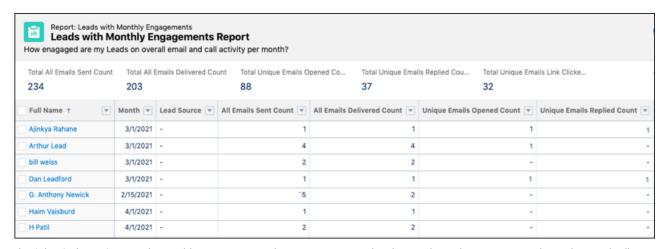
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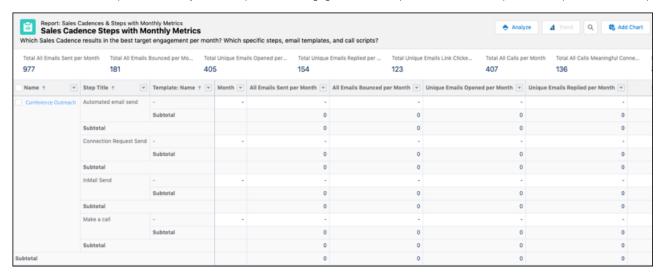
Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions.

When: These reports become available on July 1, 2021.

**Why:** The daily and monthly reports for leads, contacts, and users show sales managers detailed engagement activity for emails and calls.



The Sales Cadence Steps with Monthly Metrics report shows engagement details per sales cadence, step, email template, and call script.



How: To view the reports, see the Sample Reports folder in High Velocity Sales. To work with the report types, see Report Types in Setup.

### Sales Cadences

Add LinkedIn InMail and connection request steps to sales cadences, and see engagement data for each step, email template, and call script on sales cadence pages.

#### IN THIS SECTION:

#### Connect with Prospects via LinkedIn with Sales Cadences

Sales teams that use LinkedIn to learn about and communicate with customers and prospects can now build InMail and connection requests right into their sales process. When you turn on Use LinkedIn with Sales Cadences, sales managers can create sales cadences that connect with prospects via LinkedIn with InMail and connection request steps.

#### See the Engagement Success of Each Sales Cadence Step

Let sales managers see the effectiveness their sales cadence steps with the new Sales Cadence Engagement component. On sales cadence pages, managers can view engagement rates and totals for each email template or call script on each step so they can make updates to better drive their pipeline.

#### Other Enhancements to Sales Cadences

Add more prospects to sales cadences and advance sales cadences programmatically.

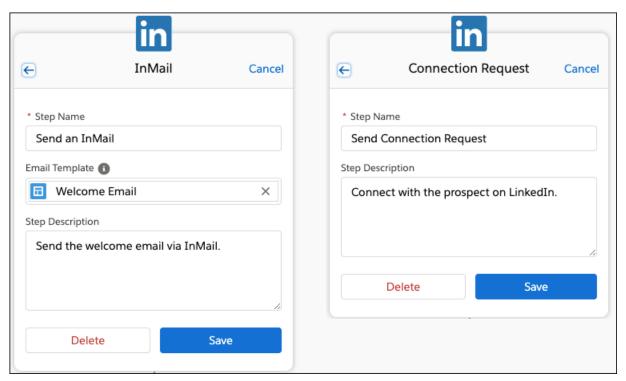
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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

**Who:** This feature is available to users with the High Velocity Sales Cadence Creator permission.

**How:** Expand your sales team's outreach options with LinkedIn steps in sales cadences. In High Velocity Sales Setup, turn on Use LinkedIn with Sales Cadences.



## See the Engagement Success of Each Sales Cadence Step

Let sales managers see the effectiveness their sales cadence steps with the new Sales Cadence Engagement component. On sales cadence pages, managers can view engagement rates and totals for each email template or call script on each step so they can make updates to better drive their pipeline.

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

When: Sales cadence engagement data becomes available in July 2021.

**How:** In Lightning App Builder, add the Sales Cadence Engagement component to sales cadence page layouts.



#### Other Enhancements to Sales Cadences

Add more prospects to sales cadences and advance sales cadences programmatically.

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

Who: These features are available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

**Why:** Sales teams can now increase their active sales cadence target limit from 150,000 to 500,000. To increase the limit, contact Salesforce Customer Support.

We've also expanded the sales cadence APIs so you can now use Process Builder, Flow, or custom code to advance or skip steps automatically.

# Sales Cloud Einstein

Score different types of leads separately for more accurate scores and set up Einstein Lead Scoring more easily with guided setup.

#### IN THIS SECTION:

### Score Lead Segments Separately for More Accurate Results

When you tell Einstein to evaluate your leads and conversion history separately for different groups of leads, scores are more useful. For example, you can score leads from trade shows and advertising campaigns separately to let Einstein determine their unique conversion patterns and provide better scores for each.

#### Enable Einstein Lead Scoring Easily with Guided Setup

The choices you make when setting up Einstein Lead Scoring affect the accuracy of your lead scores. The new guided setup flow explains each choice as you go, providing context so you can make the right decisions for your business.

#### SEE ALSO:

Einstein Release Notes

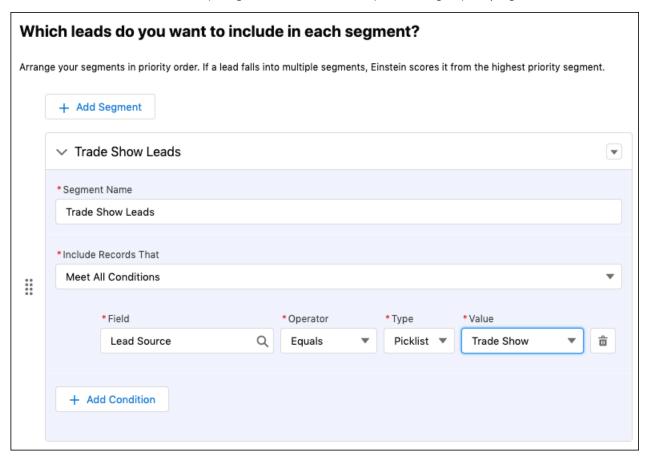
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When you tell Einstein to evaluate your leads and conversion history separately for different groups of leads, scores are more useful. For example, you can score leads from trade shows and advertising campaigns separately to let Einstein determine their unique conversion patterns and provide better scores for each.

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

**Why:** If your business works with different types of leads, their conversion patterns could have significant differences. When you use field-based criteria to put them in different segments, Einstein can calculate more accurate scores based on those patterns. Define your segments based on the criteria that make sense for your business.

**How:** In Einstein Lead Scoring Setup, use field-based criteria to define each of your lead segments. Arrange your segments in priority order. If a lead meets the criteria for multiple segments, Einstein scores it as part of the higher priority segment.





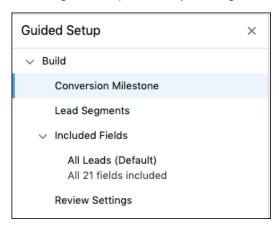
**Note:** Immediately after the Summer '21 release date and each time you update Einstein Lead Scoring settings, some data in the Tableau CRM Lead Scoring Dashboard, including lead conversion rates, can be incorrect until the next time Einstein updates your scores. This issue occurs while Einstein updates the segment IDs for each lead segment, even if you score all your leads in a single segment.

# Enable Einstein Lead Scoring Easily with Guided Setup

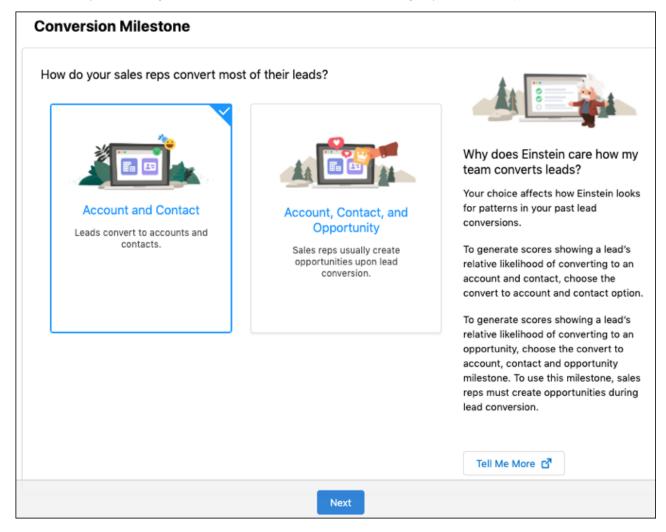
The choices you make when setting up Einstein Lead Scoring affect the accuracy of your lead scores. The new guided setup flow explains each choice as you go, providing context so you can make the right decisions for your business.

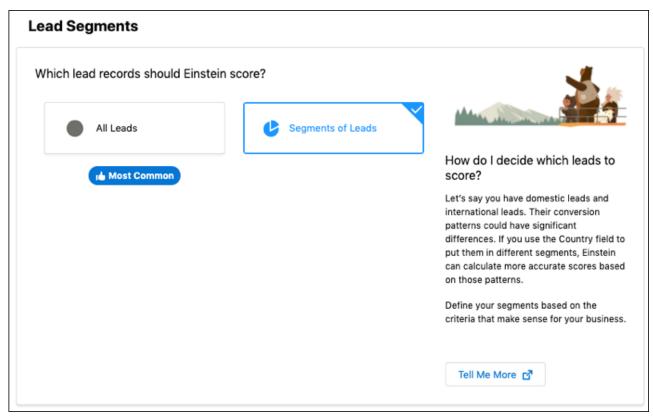
Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Enterprise, and Unlimited editions.

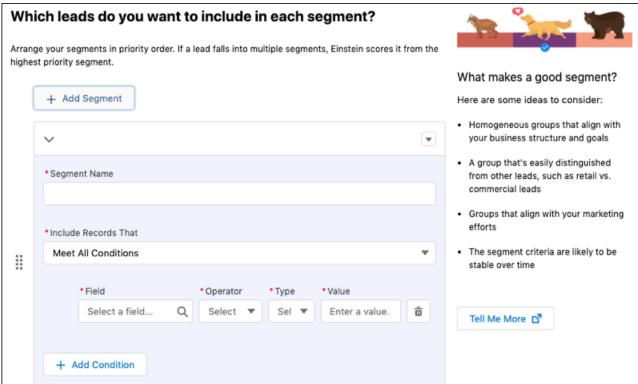
How: The guided setup flow walks you through the setup choices you make to optimize Lead Scoring for your business.

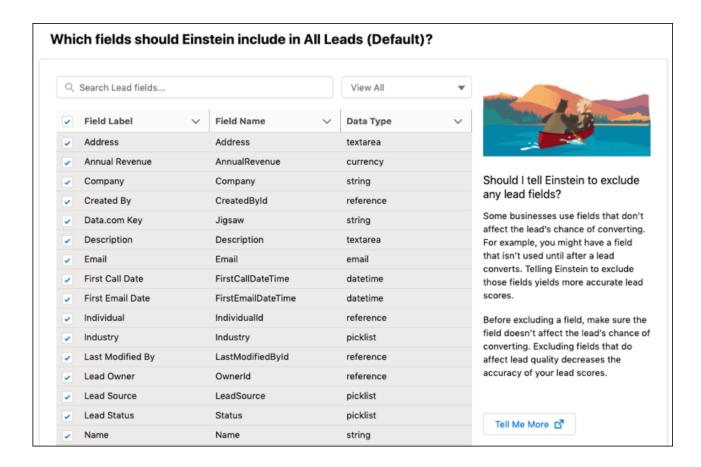


The setup flow walks you through choosing the conversion milestone that matches how your company does business, creating segments of leads for analysis, and telling Einstein which lead fields to consider when looking for your conversion patterns.









# Integration with Google

Block internal email opens from email tracking in the Gmail integration with Inbox. For customers who sync events with Lightning Sync, include Google Meet joining details on Google Calendar events.

#### IN THIS SECTION:

#### Gmail<sup>™</sup> Integration

Block internal email opens from email tracking in the Gmail integration with Inbox.

#### Lightning Sync for Google

Include Google Meet details on Google Calendar events. And if you're curious about the enhancements available for contact and event sync, see what Einstein Activity Capture is offering.

# Gmail<sup>™</sup> Integration

Block internal email opens from email tracking in the Gmail integration with Inbox.

#### IN THIS SECTION:

### Exclude Internal Email Tracking Data in the Gmail Integration with Inbox

Get a more accurate indication of the total email opens and links clicked in the emails sent from Gmail that are set for email tracking. To omit internal opens from engagement data, including when the sender opens the email, add your company's IP address range to the email tracking exclusion list.

## Exclude Internal Email Tracking Data in the Gmail Integration with Inbox

Get a more accurate indication of the total email opens and links clicked in the emails sent from Gmail that are set for email tracking. To omit internal opens from engagement data, including when the sender opens the email, add your company's IP address range to the email tracking exclusion list.

**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:

Refine Email Open Data with IP Address Blocking

## Lightning Sync for Google

Include Google Meet details on Google Calendar events. And if you're curious about the enhancements available for contact and event sync, see what Einstein Activity Capture is offering.

#### IN THIS SECTION:

#### Include Google Meet Details on Google Calendar Events

To resume including Google Meet joining details on Google Calendar events, turn on the feature from your Lightning Sync configuration. In September 2020, a restriction that Google made to its event API now requires this feature to include joining details on Google Calendar events that are originally created in Salesforce.

#### Check Out What's New with Einstein Activity Capture for Google Users

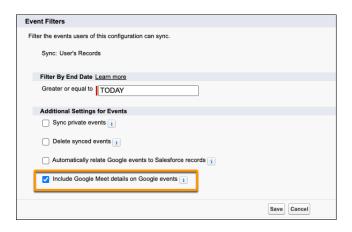
Starting in Winter '21, Einstein Activity Capture became the go-to contact and event sync product for customers with new Salesforce subscriptions. But even if you're a current Lightning Sync user, see what's new with our next-generation product. To help sales reps get up and running with Einstein Activity Capture, now you can check the status of reps' email and calendar connections. And just like Lightning Sync, Einstein Activity Capture is introducing a setting that lets you include Google Meet details on your Google Calendar events.

## Include Google Meet Details on Google Calendar Events

To resume including Google Meet joining details on Google Calendar events, turn on the feature from your Lightning Sync configuration. In September 2020, a restriction that Google made to its event API now requires this feature to include joining details on Google Calendar events that are originally created in Salesforce.

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

**How:** From Setup, on the data set for each Lightning Sync configuration assigned to your users, select **Include Google Meet details on Google events**. Then when sales reps create events in Salesforce, the details to join with Google Meet are added to the Google version of the event when the event syncs to Google Calendar.



Salesforce Help: Define Lightning Sync for Google Settings for Reps (can be outdated or unavailable during release preview)

## Check Out What's New with Einstein Activity Capture for Google Users

Starting in Winter '21, Einstein Activity Capture became the go-to contact and event sync product for customers with new Salesforce subscriptions. But even if you're a current Lightning Sync user, see what's new with our next-generation product. To help sales reps get up and running with Einstein Activity Capture, now you can check the status of reps' email and calendar connections. And just like Lightning Sync, Einstein Activity Capture is introducing a setting that lets you include Google Meet details on your Google Calendar events.

Where: Lightning Sync and Einstein Activity Capture are available in various editions.

#### SEE ALSO:

#### Einstein Activity Capture

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)

# Integration with Microsoft®

New server and client setup options available for the Outlook integration. The side panel action menu in Salesforce for Outlook is no longer available.

#### IN THIS SECTION:

### Bring Salesforce and Microsoft Teams Together (Generally Available)

Your sales and service teams use Salesforce to manage customer relationships. They also chat in Microsoft® Teams and discuss topics relevant to their sales pipeline and service cases. The Salesforce integration with Teams provides context about Salesforce records from Teams channels and chat conversations, which means no more switching between applications. The power of Salesforce with the connectivity of Teams enables groups to work together to find the information they need, when they need it. Salesforce users can mention Salesforce records in Teams to facilitate collaboration. They can preview details of records that others post, pin records to channel tabs for easy access, and keep records up to date with inline editing. Reps can also post important conversation moments to Salesforce record Chatter feeds directly from Teams.

### Outlook® Integration

Use the Outlook integration from Outlook for Mac with macOS Big Sur. Set up the Exchange server without a public Exchange Web Services endpoint. Install the Outlook integration using a file instead of Microsoft AppSource.

#### Lightning Sync for Microsoft® Exchange

We encourage current Lightning Sync users on Microsoft Office 365° to review the latest Microsoft announcements on Basic Authentication retirement for Exchange Online. Microsoft recently adjusted the retirement timeline. And if you're curious about what's new for contact and event sync, see what Einstein Activity Capture is offering.

#### Salesforce for Outlook

If you still use Salesforce for Outlook, learn about its phased retirement schedule, starting with the removal of the side panel action menu this June. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to reconnect.

# Bring Salesforce and Microsoft Teams Together (Generally Available)

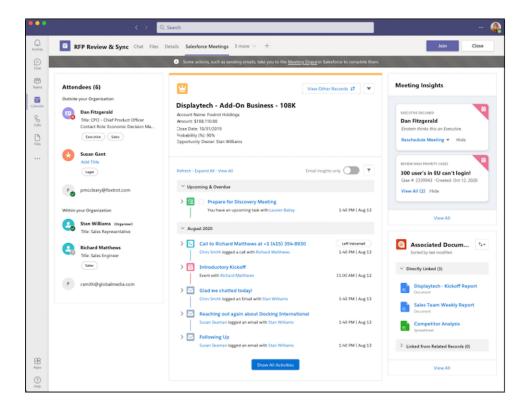
Your sales and service teams use Salesforce to manage customer relationships. They also chat in Microsoft® Teams and discuss topics relevant to their sales pipeline and service cases. The Salesforce integration with Teams provides context about Salesforce records from Teams channels and chat conversations, which means no more switching between applications. The power of Salesforce with the connectivity of Teams enables groups to work together to find the information they need, when they need it. Salesforce users can mention Salesforce records in Teams to facilitate collaboration. They can preview details of records that others post, pin records to channel tabs for easy access, and keep records up to date with inline editing. Reps can also post important conversation moments to Salesforce record Chatter feeds directly from Teams.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud and Service Cloud. When enabled, the integration features are available through the desktop, mobile, and web versions of Teams.

When: You can enable the integration starting on June 25, 2021.

**Why:** Combining the power of Salesforce with the connectivity of Microsoft Teams enables groups to work together to find the information they need, when they need it, saving time and effort. To provide an even better experience from our original pilot, integration users can take advantage of more benefits to improve their customer relationships:

- Reps can work with any Salesforce objects they have access to, including custom objects, and they can mention them in Teams conversations or pin objects to chat and channel tabs.
- Reps working in Teams can take full advantage of Salesforce Meetings for their customer meetings.



**How:** Pilot customers must reenable the Salesforce integration for Teams. From Setup, in the Quick Find box, enter *Teams*, select **Teams Integration**, then enable the integration.

#### SEE ALSO:

Salesforce Help: Microsoft Teams Integration (can be outdated or unavailable during release preview) Add the Meeting Digest to a Meeting In Microsoft Teams

# Outlook® Integration

Use the Outlook integration from Outlook for Mac with macOS Big Sur. Set up the Exchange server without a public Exchange Web Services endpoint. Install the Outlook integration using a file instead of Microsoft AppSource.

#### IN THIS SECTION:

#### Outlook Integration Available with macOS Big Sur

Outlook integration and Outlook integration with Inbox users can now log in to the integration from Outlook for Mac if their computer is running macOS Big Sur. Previously, users who upgraded to the Big Sur operating system were blocked from accessing the integration.

### Set Up the Outlook Integration Without Public Exchange Web Services

You can now integrate Microsoft Outlook with Salesforce without making Exchange Web Services (EWS) publicly available to Salesforce. This change simplifies the Outlook integration requirements. And it brings the integration to organizations who couldn't benefit from its features before.

#### Install the Outlook Integration from a File Instead of Microsoft AppSource

The Outlook integration is now available to install from a file instead of only from Microsoft AppSource. Installing from a file brings the integration to more companies whose security policies don't allow access to Microsoft AppSource.

#### Exclude Internal Email Tracking Data in the Outlook Integration with Inbox

Get a more accurate indication of the total email opens and links clicked in the emails sent from Outlook that are set for email tracking. To omit internal opens from engagement data, including when the sender opens the email, add your company's IP address range to the email tracking exclusion list.

#### Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending

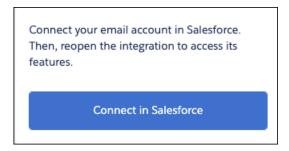
Support for running the Outlook integration in Outlook 2013, Outlook 2016, and volume-licensed versions of Outlook 2019 ends December 31, 2021. To continue using the Outlook integration after the end of 2021, make plans now to upgrade. After December 2021 you need Office version 16.0.11629 and later, and Windows 10 versions 1903 and later.

## Outlook Integration Available with macOS Big Sur

Outlook integration and Outlook integration with Inbox users can now log in to the integration from Outlook for Mac if their computer is running macOS Big Sur. Previously, users who upgraded to the Big Sur operating system were blocked from accessing the integration.

**Where:** This change applies to the Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

**How:** From Outlook for Mac, users who already connected their email account to Salesforce are prompted to log in to Salesforce as usual. First-time integration users who also have Inbox are prompted to connect their account in Salesforce.



Click **Connect in Salesforce** to open Lightning Experience to the Email and Calendar Accounts page. Click **New Account** and follow the prompts to connect an account. Then return to Outlook for Mac, close and reopen the integration, and continue the login process.

## Set Up the Outlook Integration Without Public Exchange Web Services

You can now integrate Microsoft Outlook with Salesforce without making Exchange Web Services (EWS) publicly available to Salesforce. This change simplifies the Outlook integration requirements. And it brings the integration to organizations who couldn't benefit from its features before.

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

**When:** For existing Salesforce customers, this setup is available on a rolling basis starting in the Summer '21 release. For details about timing and eligibility, contact your Salesforce account executive. For customers that are new to Salesforce in Summer '21 or haven't enabled the Outlook integration before Summer '21, this functionality is available automatically.

**How:** Without publicly exposing EWS, for all integration features to be available to sales reps, the Exchange server and the Outlook client must support Microsoft Office JavaScript API v1.8 or later. That API version is available in:

- Exchange online
- Microsoft 365 with version 1910 (built 12130.20272) or later
- Office 2019 (retail only) with version 1910 (build 12130.20272) or later

To verify if your version of Exchange or Outlook supports JavaScript API v1.8 or later, check the Microsoft documentation.

If you use the following Exchange versions or Outlook clients, which run JavaScript API v1.7 or earlier, you can still set up Outlook integration without publicly exposing EWS to Salesforce. But sales reps can't log email attachments directly from the integration and can't use Inbox features.

- Exchange 2016 and 2019
- Office 2013, 2016, or Office 2019 one-time purchase

In either scenario, a local EWS connection is still required between Outlook and Exchange. And the Exchange Metadata URL must still be publicly exposed.

#### SEE ALSO:

Salesforce Help: Outlook Integration System Requirements (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Your Exchange Server for the Outlook Integration (can be outdated or unavailable during release preview)

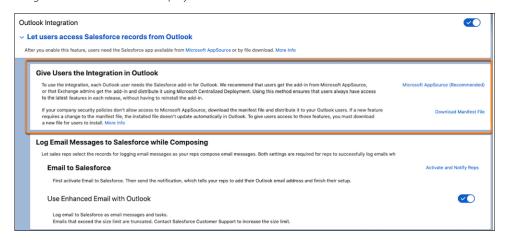
External Link: Outlook JavaScript API requirements set (Microsoft Documentation)

## Install the Outlook Integration from a File Instead of Microsoft AppSource

The Outlook integration is now available to install from a file instead of only from Microsoft AppSource. Installing from a file brings the integration to more companies whose security policies don't allow access to Microsoft AppSource.

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

**How:** Salesforce admins get the manifest file from the Outlook Integration and Sync page in Salesforce setup. After saving the file, admins can either place the file in a central location where sales reps can access it, or distribute the installation to their sales reps' Outlook clients using Microsoft's Centralized Deployment. Admins can also share the link with their users.



Sales reps use the Add from File or Add from URL option in Outlook when installing the add-in.

(1) Important: To ensure that you always have the latest version of the add-in that provides the latest features, we still recommend getting the Salesforce app from Microsoft AppSource, either by individual access or admin centralized deployment. Getting the app from the store ensures that updates are available when the file is updated. Although infrequent, some features can require a change to the manifest file. If you install the add-in using the file method, you must reinstall the file to access features that require an update. Check the release notes for each release for alerts about features that require a file update.

#### SEE ALSO:

External Link: Get an Office add-in for Outlook (Microsoft Documentation)

Salesforce Help: Distribute the Outlook Integration to Users (can be outdated or unavailable during release preview)

## Exclude Internal Email Tracking Data in the Outlook Integration with Inbox

Get a more accurate indication of the total email opens and links clicked in the emails sent from Outlook that are set for email tracking. To omit internal opens from engagement data, including when the sender opens the email, add your company's IP address range to the email tracking exclusion list.

**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:

Refine Email Open Data with IP Address Blocking

## 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.

**Where:** This change applies to the Outlook integration, formerly known as Lightning for Outlook, in all editions, for users running 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)

# Lightning Sync for Microsoft® Exchange

We encourage current Lightning Sync users on Microsoft Office 365° to review the latest Microsoft announcements on Basic Authentication retirement for Exchange Online. Microsoft recently adjusted the retirement timeline. And if you're curious about what's new for contact and event sync, see what Einstein Activity Capture is offering.

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#### Check Out What's New with Einstein Activity Capture for Microsoft Users

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#### Review Microsoft Announcements on Basic Authentication Retirement for Exchange Online

At the end of 2020, Microsoft revised the retirement timeline for Basic Authentication on Exchange Online. If your company uses Exchange Online and a service account as your Lightning Sync connection method, review the updated retirement timeline. Then you can be prepared to update your connection method when it's time. Or you can consider moving to Einstein Activity Capture.

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Where: Lightning Sync and Einstein Activity Capture are available in various editions.

SEE ALSO:

**Einstein Activity Capture** 

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)

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**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 to migrate 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 affects 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 still use Salesforce for Outlook, learn about its phased retirement schedule, starting with the removal of the side panel action menu this June. And for customers whose Salesforce for Outlook connections are blocked due to a recent change in their access to Salesforce Classic, learn how to reconnect.

#### IN THIS SECTION:

#### Action Menu No Longer Available

Sales reps can no longer create Salesforce records directly from Outlook using the side panel action menu. Learn how that change affects you and your sales reps, and about the Salesforce for Outlook full product retirement that's scheduled for June 2023.

#### 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

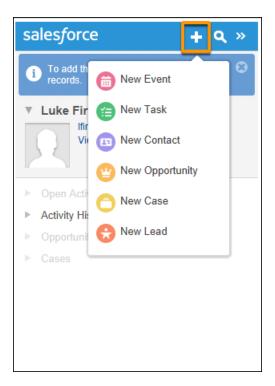
Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

## Action Menu No Longer Available

Sales reps can no longer create Salesforce records directly from Outlook using the side panel action menu. Learn how that change affects you and your sales reps, and about the Salesforce for Outlook full product retirement that's scheduled for June 2023.

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

**How:** Starting in Summer '21, reps no longer see the new records button () in the side panel in Outlook. As a result, reps can no longer create Salesforce records using Salesforce for Outlook.



To create Salesforce records again, reps can log into Salesforce. Or, if you're ready to move to our next-generation product, the Outlook Integration, reps can create records directly from Outlook using the side panel available with that product.

While you can continue to edit or create email publisher layouts from Outlook Configurations in Setup, doing so no longer affects the action menus in the Salesforce for Outlook side panel. But if you plan to move to the Outlook Integration, we recommend that you avoid deleting any existing layouts. You can repurpose them when you set up the Outlook integration.

Remaining Salesforce for Outlook features are available until the full product is retired in June 2023. For more details, 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 Summer '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 (can be outdated or unavailable during release preview)

# Other Changes in the Sales Cloud

Learn about other changes we made to improve usability.

#### IN THIS SECTION:

#### Know Where Your Activity Data Is Stored

When you use Einstein Activity Capture, Inbox, or High Velocity Sales, some of your activity data is stored on the Salesforce Amazon Web Services Infrastructure. Now you can see whether your data is stored in data centers in the United States or Germany.

#### Connected Accounts Page Was Renamed

To help distinguish among the types of accounts that sales reps can connect to Salesforce, the Connected Accounts page, which is where users see which email and calendar accounts are connected to Salesforce, is called Email and Calendar Accounts.

#### New Location for Activity Storage Information

The Activity Storage page that showed the number of activities captured by Inbox and Einstein Activity Capture was removed. You can now find the activity storage information on the User Status page.

# Know Where Your Activity Data Is Stored

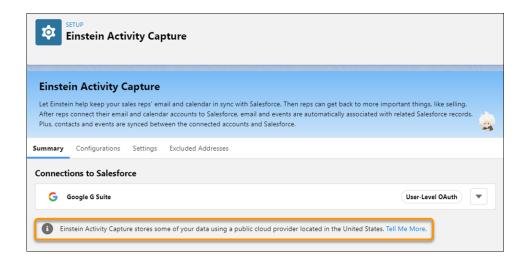
When you use Einstein Activity Capture, Inbox, or High Velocity Sales, some of your activity data is stored on the Salesforce Amazon Web Services Infrastructure. Now you can see whether your data is stored in data centers in the United States or Germany.

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

**How:** If you use Inbox, go to the Inbox Setup Assistant.

If you use High Velocity Sales, go to the High Velocity Sales setup page.

If you use Einstein Activity Capture, go to the Summary tab on the Einstein Activity Capture settings page.



Salesforce Inbox

**High Velocity Sales** 

Einstein Activity Capture

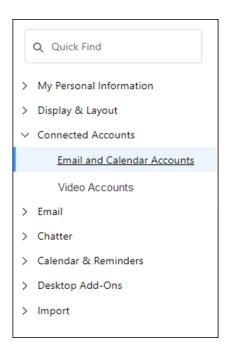
# Connected Accounts Page Was Renamed

To help distinguish among the types of accounts that sales reps can connect to Salesforce, the Connected Accounts page, which is where users see which email and calendar accounts are connected to Salesforce, is called Email and Calendar Accounts.

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

Who: The Email and Calendar Accounts page is available to Einstein Activity Capture and Inbox users.

**How:** When users manage their connected Microsoft or Google account through features such as Einstein Activity Capture and Inbox, they go to their personal settings and then click **Email and Calendar Accounts** under Connected Accounts.



Salesforce Help: Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox (can be outdated or unavailable during release preview)

# New Location for Activity Storage Information

The Activity Storage page that showed the number of activities captured by Inbox and Einstein Activity Capture was removed. You can now find the activity storage information on the User Status page.

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

Who: Activity storage information is available when you use Inbox with or without Einstein Activity Capture.

How: From Setup, in the Quick Find box, enter Einstein Activity Capture, and then select User Status.

#### SEE ALSO:

Salesforce Help: Data Retention for Einstein Activity Capture and Inbox (can be outdated or unavailable during release preview)
Troubleshoot Einstein Activity Capture Connection Issues More Easily

# Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Salesforce Anywhere. Use templates in more places with the Template Library in Lightning Experience, streamline your template process with template live apps, and update live Salesforce data from anywhere. Measure and report on your users' document engagement with Quip metrics in Tableau and Tableau CRM.

#### IN THIS SECTION:

When to Expect Salesforce Anywhere Features

New Salesforce Anywhere features are coming soon.

#### Access Your Templates from the Lightning App Builder

Now you can access your Template Library galleries, like your Created by Me gallery or company galleries, from the Lightning App Builder. This change saves you from switching back and forth between Quip and Lightning Experience.

#### Keep a Record of Your Customer Documents with PDFs in Salesforce Flow

Now you can export your customer-facing or completed documents to PDFs and attach them to the relevant records. Use the Export Document to PDF action in Salesforce Flow to automatically export a completed document like a Pricing Proposal. And then attach the PDF to the record for recordkeeping.

### Simplify Your Template Setup with Template Live Apps

It's easier to add templated versions of Salesforce records and related lists to your templates. When you @mention Salesforce Record or Salesforce List in a template, select **Template Record** or **Template Related List**, and choose which fields you want to dynamically fill based on the Salesforce record. Entering mail merge isn't necessary, unless you want to reference related objects and fields.

#### Report on Quip Document and User Engagement from More Places

It's easier than ever to report on how your users engage with documents and templates. With Quip engagement metrics in Tableau, Tableau CRM, and Salesforce reports, you decide where you collect metrics and how they interact with other data sources. For example, you can see how your templates relate to lead conversion and opportunity close rates, see which territories have the best template adoption, and more.

#### Update Your Salesforce Data on the Go

Now you can insert and update the Salesforce List and Salesforce Record live apps from the Quip iOS mobile app. Your users can keep documents, like Account Plans, up to date with the latest Salesforce changes right from their phones. Account Executives can update an Opportunity stage and add notes about a customer meeting right as it happens, saving them administrative work later.

#### Learn About Changes to Salesforce Anywhere Beta

Thank you for participating in the Salesforce Anywhere beta and trying out the Anywhere mobile app, messages, and alerts. We're winding down our beta as of the Summer '21 release.

### Get the Enhanced Salesforce Anywhere Experience

Keep your templates secure, turn off metrics, and learn more about the other new enhancements to Salesforce Anywhere.

# When to Expect Salesforce Anywhere Features

New Salesforce Anywhere features are coming soon.

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

When: See when you can start using new Salesforce Anywhere features.

Feature	Date
Template Library in Lightning App Builder	When the release goes live for your org.
Attach PDF to Record	Available now
Template Live Apps	May 2021
Quip Engagement Metrics in Tableau and Tableau CRM	Available in Tableau now. Available in Tableau CRM as the release goes live for your org.
Salesforce Live Apps on iOS	Available now
Verification Emails	Early June 2021

Feature	Date
Single-Click Connect for VPC	Available now
Hide Templates from Lightning Components	Available now
Open in Quip Button Removed for Templates	Available now
Auto-Refresh Reports Enhancements	Early June 2021
Link to Chatter and Group Records	Available now
Document Title Syncing	Available now
Connect to a Non-Default Org	Available now

# Access Your Templates from the Lightning App Builder

Now you can access your Template Library galleries, like your Created by Me gallery or company galleries, from the Lightning App Builder. This change saves you from switching back and forth between Quip and Lightning Experience.

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: From the Lightning App Builder, add the Quip Document component, and set it to One template for each record.

# Keep a Record of Your Customer Documents with PDFs in Salesforce Flow

Now you can export your customer-facing or completed documents to PDFs and attach them to the relevant records. Use the Export Document to PDF action in Salesforce Flow to automatically export a completed document like a Pricing Proposal. And then attach the PDF to the record for recordkeeping.

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.

#### SEE ALSO:

Automate Pricing Proposals with Salesforce Flow Export a Document to a PDF from a Process Flow Core Action for Quip: Export Quip Document to PDF

# Simplify Your Template Setup with Template Live Apps

It's easier to add templated versions of Salesforce records and related lists to your templates. When you @mention Salesforce Record or Salesforce List in a template, select **Template Record** or **Template Related List**, and choose which fields you want to dynamically fill based on the Salesforce record. Entering mail merge isn't necessary, unless you want to reference related objects and fields.

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:** To add template records and related lists, mark the document as a template.

# Report on Quip Document and User Engagement from More Places

It's easier than ever to report on how your users engage with documents and templates. With Quip engagement metrics in Tableau, Tableau CRM, and Salesforce reports, you decide where you collect metrics and how they interact with other data sources. For example, you can see how your templates relate to lead conversion and opportunity close rates, see which territories have the best template adoption, and more.

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. Only users with Tableau CRM Growth or Tableau CRM Plus licenses can use Quip engagement metrics in Tableau CRM. Tableau Creator licenses are required to access Quip engagement metrics in Tableau, and Tableau Server licenses are recommended for the best cross-team collaboration.

# Update Your Salesforce Data on the Go

Now you can insert and update the Salesforce List and Salesforce Record live apps from the Quip iOS mobile app. Your users can keep documents, like Account Plans, up to date with the latest Salesforce changes right from their phones. Account Executives can update an Opportunity stage and add notes about a customer meeting right as it happens, saving them administrative work later.

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.

# Learn About Changes to Salesforce Anywhere Beta

Thank you for participating in the Salesforce Anywhere beta and trying out the Anywhere mobile app, messages, and alerts. We're winding down our beta as of the Summer '21 release.

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

**Why:** The Salesforce Anywhere beta experience includes these changes.

- We're removing the Anywhere app from the publicly listed iOS store. Existing users with access to the Anywhere mobile app can still access beta messages and alerts on mobile in the Summer '21 release.
  - Note: Anywhere features in mobile remain in a beta status and aren't supported by Salesforce Customer success or engineering. For more information on our beta feature policy, review the <u>full agreement</u>. If you have questions about what this policy means for your use of Salesforce Anywhere, please let us know or contact your Account Executive.
- We're removing messages and alerts from Lightning Experience.

# Get the Enhanced Salesforce Anywhere Experience

Keep your templates secure, turn off metrics, and learn more about the other new enhancements to Salesforce Anywhere.

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:** Salesforce Anywhere (Quip) features include these enhancements.

- In Spring '21, we announced the launch of templated data mentions, which dynamically autofill your documents created from
  embedded templates with data from the Salesforce record. They're now called Template Data Mentions. To insert one in a template,
  @mention Template Data Mention.
- Use verification emails to keep your Salesforce and Quip sites secure.

- If a user has different email addresses for their Quip and Salesforce accounts, a verification link is sent to their Salesforce email
  to confirm their identity when they first connect Quip and Salesforce.
- Turn off Quip engagement metrics without contacting Support.
- Let your Quip VPC users complete the connection to Salesforce with one click via the Salesforce Anywhere (Quip) banner.
- Keep your embedded templates secure.
  - To prevent users from accidentally opening a template embedded in the Quip Document component, we removed the Open in Quip button.
  - We hid templates from a record's Files component, its Notes and Attachments component, and from the Files tab.
- Link a document to a Chatter or Group record from the Quip Associated Documents component.
- Create a document from the Quip Associated Documents component faster than ever.
  - We removed the number of steps required to create a document in Lightning Experience. Your users can now name the document
    and see who can access it via Synced Sharing at the same time.
- Salesforce reports in an inactive document stop auto-refreshing after 4 hours. Users can manually refresh a report anytime, up to the allowed Salesforce API hourly org limit.
- Document titles stay up to date in the Files tab in Salesforce.
- When a user goes to connect more Salesforce sandbox orgs to their Quip site, they can now connect an org that isn't the default set by the admin.

### Salesforce CMS

Take more control of your Salesforce CMS content. Manage publication schedules, share content through the Experience Cloud Content Delivery Network (CDN), edit custom content types, and view details about your CMS Experiences and where they use CMS content at a glance.

#### IN THIS SECTION:

#### Create and Manage Content Publication Schedules in Salesforce CMS

Now you can schedule your Salesforce CMS content to publish and unpublish at designated dates and times, as well as publish with an auto-unpublish in one step. And you can view publication schedules. Previously you could only publish and unpublish content immediately.

#### Share CMS Content through a Default Domain in Public Channels

Now you can serve Salesforce CMS content through the Experience Cloud Content Delivery Network (CDN) without setting up a custom domain for your public channel. As an alternative to obtaining a custom domain for your public channel, we're offering a default domain that you can use to directly source your CMS content through our CDN partner, Akamai.

#### Edit Existing Salesforce CMS Custom Content Types

Use the ManagedContentType Metadata and Tooling APIs to add new fields or change the properties of existing fields in custom content types.

### Access CMS Content with an LWC Wire Adapter (Beta)

Use the Lightning Web Components Wire Service to access Salesforce CMS content data. The lightning/cmsDeliveryApi module listContent wire adapter retrieves published CMS content versions for an Experience Builder site.

#### See More Details About Your Site on the CMS Experiences Page

See more information about your site at a glance. New columns include Last Published, Last Published By, Template, and Framework. The Framework column tells you whether your site is using Lightning Web Runtime, Aura, or Visualforce under the hood. You can also link to your live site from the Action column.

#### Locate CMS Image Content References by Site

Track which sites use your Salesforce CMS image content. The enhanced Used by card on the image information page now links to Experience Builder sites that use that image.

# Create and Manage Content Publication Schedules in Salesforce CMS

Now you can schedule your Salesforce CMS content to publish and unpublish at designated dates and times, as well as publish with an auto-unpublish in one step. And you can view publication schedules. Previously you could only publish and unpublish content immediately.

**Where:** This change applies to Lightning Experience when you purchase Salesforce CMS in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** To create, edit, and delete schedules, you must have a content manager role or content admin role in that CMS workspace, or be a Salesforce admin.

**How:** Open the content details page in Salesforce CMS and click **Schedule Publish** or **Schedule Unpublish** to create a content publication schedule. Optionally, include referenced content in the publication schedule.

An at-a-glance list of publication activity, including publication date, publication name, and status is available for each version of the content in the new, **Publication Activity** tab. To see schedule information for pending, completed, canceled, or failed publications, select > **View Schedule**. From the same row-level actions, select > **Edit Schedule** to change schedule information for a pending publication. Select > **Delete Schedule** to cancel a pending publication.

A publication calendar is available for the entire CMS workspace. To see an overview of pending, completed, and failed publication calendars, open the workspace in Salesforce CMS and click **Publication Calendar**. To see schedule information for pending, completed, or failed publications, select > **View Schedule**. From the same row-level actions, select > **Edit Schedule** to change schedule information for a pending publication. Select > **Delete Schedule** to cancel a pending publication and remove the entry from the Publication Calendar.

# Share CMS Content through a Default Domain in Public Channels

Now you can serve Salesforce CMS content through the Experience Cloud Content Delivery Network (CDN) without setting up a custom domain for your public channel. As an alternative to obtaining a custom domain for your public channel, we're offering a default domain that you can use to directly source your CMS content through our CDN partner, Akamai.

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

**How:** The default domain for public channels requires My Domain. If you don't have a deployed My Domain, set one up and deploy it to your users.

If you have a deployed My Domain, you can start sharing your Salesforce CMS content to a public channel with the default domain. In the Salesforce CMS app, click **Create Channel**, and select **Public Channel**. On the CMS Channels page, click > **Edit** beside your public channel. Navigate to the dropdown menu under **Domain** and select the default My Domain URL. The default domain URL format is https://MyDomainName.cdn.salesforce-experiences.com.

You can also use the default domain to serve CMS images to Pardot Email.

SEE ALSO:

Salesforce Help: Experience Cloud Content Delivery Network (CDN) Overview (can be outdated or unavailable during release preview)

Salesforce Help: My Domain Overview (can be outdated or unavailable during release preview)

Set Up Your Image Repository Faster with a Default CDN Domain

# **Edit Existing Salesforce CMS Custom Content Types**

Use the ManagedContentType Metadata and Tooling APIs to add new fields or change the properties of existing fields in custom content types.

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

**Who:** To create and edit content using the Tooling API, enable the Customize Application user permission. To create and edit content using the Metadata API, enable the Modify Metadata Through Metadata API Functions user permission.

How: Use the ManagedContentType Metadata or Tooling API to edit custom content types. Add or edit nodes in the existing ManagedContentType type. Each node is a single field in the resulting form. After you edit a custom content type, it appears as a form for adding content in the Salesforce CMS app. In your CMS workspace, select the custom content type you edited and then add details to the new fields. This API ensures that changes to custom content types are backward compatible to prevent breaking existing content.

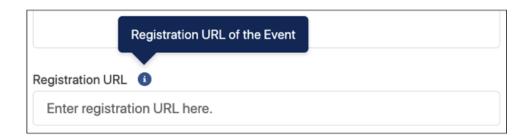


**Example**: Using the Metadata API, this example shows an update to an Event custom content type to add Registration URL field. The new node is the last entry.

```
"Metadata" : {
   "description" : "Information about upcoming events",
    "developerName" : "demoMct",
    "managedContentNodeTypes" : [ {
     "helpText" : "The title of this event.",
      "isLocalizable" : true,
     "isRequired" : true,
      "nodeLabel" : "Event Name",
     "nodeName" : "title",
      "nodeType" : "NAMEFIELD",
      "placeholderText" : "Enter Event Name Here"
      "helpText" : "Event Image",
     "isLocalizable" : false,
      "isRequired" : false,
      "nodeLabel" : "Event Image",
      "nodeName" : "bannerImage1",
     "nodeType" : "IMG",
      "placeholderText" : "Upload a Image here"
      "helpText" : "Time at which the event starts.",
      "isLocalizable" : false,
     "isRequired" : false,
      "nodeLabel" : "Event Start Time",
      "nodeName" : "startTime",
      "nodeType" : "DATETIME",
```

```
"placeholderText" : null
 }, {
   "helpText" : "Time at which the event ends.",
   "isLocalizable" : false,
   "isRequired" : false,
    "nodeLabel" : "Event End Time",
    "nodeName" : "endTime",
   "nodeType" : "DATETIME",
   "placeholderText" : null
    "helpText" : "Venue of the Event",
   "isLocalizable" : true,
   "isRequired" : false,
   "nodeLabel" : "Event Venue",
    "nodeName" : "address",
    "nodeType" : "MTEXT",
    "placeholderText" : "Enter Venue address here."
 }, {
    "helpText" : null,
   "isLocalizable" : true,
   "isRequired" : false,
   "nodeLabel" : "Additional Details and Contact Information",
    "nodeName" : "details",
    "nodeType" : "RTE",
    "placeholderText" : "Enter any additional details here."
    "helpText" : "Registration URL of the Event",
   "isLocalizable" : false,
   "isRequired" : false,
    "nodeLabel" : "Registration URL",
   "nodeName" : "regUrl",
    "nodeType" : "URL",
    "placeholderText" : "Enter registration URL here."
 "masterLabel" : "Event",
 "urls" : null
}
```

In the Salesforce CMS workspace, the edited custom content type shows the new fields.



SEE ALSO:

Salesforce MetaData API Developer Guide: ManagedContentType (can be outdated or unavailable during release preview)
Salesforce Tooling API Developer Guide: ManagedContentType (can be outdated or unavailable during release preview)

# Access CMS Content with an LWC Wire Adapter (Beta)

Use the Lightning Web Components Wire Service to access Salesforce CMS content data. The lightning/cmsDeliveryApi module listContent wire adapter retrieves published CMS content versions for an Experience Builder site.

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



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

**Who:** To create and edit content, you must have a content admin or content manager role in that CMS workspace or be a Salesforce admin.

**How:** Use the lightning/cmsDeliveryApi module listContent wire adapter to get the published CMS content versions for an Experience Builder site.

```
import { LightningElement, wire } from "lwc";
import Id from '@salesforce/community/Id';
import { listContent } from 'lightning/cmsDeliveryApi';

export default class ListContentDemo extends LightningElement {
    @wire(listContent, {communityId: '$Id'})
    cmsRecords;
}
```

SEE ALSO:

New and Changed Modules for Lightning Web Components

# See More Details About Your Site on the CMS Experiences Page

See more information about your site at a glance. New columns include Last Published, Last Published By, Template, and Framework. The Framework column tells you whether your site is using Lightning Web Runtime, Aura, or Visualforce under the hood. You can also link to your live site from the Action column.

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

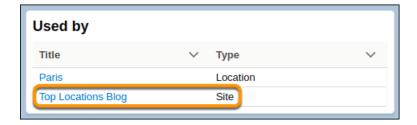
# Locate CMS Image Content References by Site

Track which sites use your Salesforce CMS image content. The enhanced Used by card on the image information page now links to Experience Builder sites that use that image.

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

Who: To view content, you must have a contributor role in that CMS workspace.

**How:** From your Salesforce CMS workspace, click the name of the image content. The Used by card lists Experience Builder sites that reference this image content. Click the link to view this reference at the site level.



SEE ALSO:

Salesforce Help: Work with Image Content in Salesforce CMS (can be outdated or unavailable during release preview)

# Security and Identity

Preview Multi-Factor Authentication Assistant behavior before you deploy it. URL redirects and OAuth 2.0 flows are more secure and efficient. You can now update users' email addresses more easily and securely. HTTPS is required for Salesforce domains, and enhanced domains meet browser security requirements. Encrypt the User Email field (beta). Learn more about API version use with the new API Total Usage event type. Security Center now integrates with Threat Detection (beta). For sites, improve page load times with caching and update guest user licenses.

#### IN THIS SECTION:

#### Identity and Access Management

Identity and Access Management provides you with an upgraded version of the Multi-Factor Authentication Assistant, which includes a step that helps you preview multi-factor authentication (MFA) during your evaluation period. Other improvements include updates to OAuth 2.0 flows and connected app access to Customer Data Platform (CDP) ingest API services. And you can secure email address updates by requiring password resets. Customer 360 Identity provides extra customer protection with secure Embedded Login redirects and verification of email address updates. We're deprecating Identity Connect 2.1 and Identity Connect 3.0.1.2. You can upgrade to Identity Connect 7 when it's released later this spring. In the Winter '22 release, Salesforce is increasing the length of one-time passwords to improve security.

#### **Domains**

Deploy a My Domain, and enable enhanced domains to meet the latest browser requirements. Improve Search Engine Optimization (SEO) by redirecting your site traffic to your custom domain. Secure HTTPS connections are enforced and HSTS preloading is recommended for your domains.

#### Salesforce Shield

Use the new Real-Time Event Monitoring Permission Set Event (generally available) to monitor permission changes and even make Transaction Security policies for user permissions. The APITotalUsage event log file type helps you track unused API versions. And the new USER\_TYPE field helps identify if users associated with events are authenticated or guest users. Shield Platform Encryption now supports the User Email field (beta) and contact point fields.

#### **Security Center**

New date range fields on metric detail pages give you flexibility over which metric details you see at once. And Security Center now integrates with Event Monitoring Threat Detection (beta). You can see the total number of events per threat type, along with detailed information about each threat event without leaving the Security Center app. Threat event metrics update in near real time, offering you a more timely and complete view of your security posture.

#### Other Security Changes

Improve load times for authenticated site visitors through a new Visualforce page caching option. Update your site guest users to the latest license. Secure HTTPS connections are enforced for third-party domain connections, and you can decide what types of cookies are allowed on your Salesforce Sites.

# Identity and Access Management

Identity and Access Management provides you with an upgraded version of the Multi-Factor Authentication Assistant, which includes a step that helps you preview multi-factor authentication (MFA) during your evaluation period. Other improvements include updates to OAuth 2.0 flows and connected app access to Customer Data Platform (CDP) ingest API services. And you can secure email address updates by requiring password resets. Customer 360 Identity provides extra customer protection with secure Embedded Login redirects and verification of email address updates. We're deprecating Identity Connect 2.1 and Identity Connect 3.0.1.2. You can upgrade to Identity Connect 7 when it's released later this spring. In the Winter '22 release, Salesforce is increasing the length of one-time passwords to improve security.

#### IN THIS SECTION:

#### Manage Your Customer Identities in a Central Location with Salesforce Customer Identity Plus

Salesforce Customer Identity Plus brings together the power of Salesforce and Auth0's identity-as-a-service SaaS to deliver our latest consumer identity and access management (CIAM) solution. With Customer Identity Plus, connect to all of your customers, apps, and products by managing customer identities centrally for Commerce Cloud, Sales Cloud, and third-party applications. Customer Identity Plus makes identity configuration easy through simple clicks and SDKs that can seamlessly integrate an identity layer into existing applications. And if you want customization capabilities, Customer Identity Plus gives you full control over design and authentication flows.

#### Get More Guidance from the Multi-Factor Authentication Assistant

The Multi-Factor Authentication Assistant now includes a step that helps you preview multi-factor authentication (MFA) during your evaluation period. While you're getting ready to roll out MFA for Salesforce, we recommend turning it on for a few of your Salesforce champions. Conducting a preview or pilot with some trusted users lets you test the rollout process and collect early feedback on the MFA user experience. Use these insights to ensure there are no gaps in your rollout or change management plans. You can also determine the kinds of onboarding materials your users need when you're ready to launch MFA more broadly.

#### Get Assigned Scopes with Access Tokens in the OAuth 2.0 JWT Bearer Flow

With the OAuth 2.0 JWT bearer flow, for connected apps that are preauthorized, standard and custom scopes are automatically returned with an access token. Previously, only standard scopes or scopes issued with former access tokens were returned.

#### Improve Performance Times of the OAuth 2.0 Hybrid App Flows

Improve performance times of the OAuth 2.0 hybrid app flows by directly bridging an access token into a web session without using frontdoor, jsp. With the hybrid app token flow, a hybrid app sets the domains' associated SIDs in the session cookies. It then directly bridges its own 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.

#### Give Authorized Access to Salesforce CDP Ingestion API Data

To authorize a connected app to access Salesforce CDP Ingestion API data, assign it the new OAuth scope: Access and manage your Salesforce CDP Ingestion API data. Customers can use the associated external app to upload and maintain external data sets in the Salesforce CDP platform.

#### Redirect Expired Tabs to a Custom Logout URL

For Salesforce sessions, you can now redirect all expired tabs in your browser to a custom logout URL. Previously, the redirect URL wasn't applied to all expired tabs. Instead, only one tab was being redirected correctly, and the other tabs were redirected to Salesforce.com.

#### Require Password Changes for Email Address Updates

You can now require a user to change passwords before an admin-initiated email address update is approved. To quickly update your users' email addresses, you can change email addresses without requiring a password reset. But, for better security, you can require users to change their passwords before email address updates are approved.

#### Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Enforced)

To protect user accounts against security threats, Salesforce now requires Experience Cloud users, partners, and customers to verify their email address changes. This update, first available in Winter '21, was scheduled for auto-enforcement in Spring '21, but was postponed to and is enforced in Summer '21.

#### Block Customer Redirects to Unknown URLs

Protect your customers with a new Embedded Login setting that blocks redirects to unknown URLs. After customers successfully log in to your Experience Cloud site with Embedded Login, they're redirected to URLs that are located in the same host or domain as the site or that are allow-listed.

#### Identity Connect 2.1 and Identity Connect 3.0.1.2 Are Being Deprecated

As of the Winter '22 release, we're deprecating Identity Connect 2.1 and Identity Connect 3.0.1.2, and you can no longer download these versions of the product. We recommend that you upgrade to Identity Connect 7 when it becomes available.

#### One-Time Passwords Are Getting Longer in Winter '22

In Winter '22, to improve security, Salesforce is increasing the length of one-time passwords (OTPs) used for identity verification from five digits to six digits. If you have customizations that rely on six-digit OTPs, such as custom Apex implementations for multi-factor authentication (MFA) or passwordless login, change them before the Winter '22 release.

# Manage Your Customer Identities in a Central Location with Salesforce Customer Identity Plus

Salesforce Customer Identity Plus brings together the power of Salesforce and Autho's identity-as-a-service SaaS to deliver our latest consumer identity and access management (CIAM) solution. With Customer Identity Plus, connect to all of your customers, apps, and products by managing customer identities centrally for Commerce Cloud, Sales Cloud, and third-party applications. Customer Identity Plus makes identity configuration easy through simple clicks and SDKs that can seamlessly integrate an identity layer into existing applications. And if you want customization capabilities, Customer Identity Plus gives you full control over design and authentication flows.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Developer, and Unlimited editions for an extra cost.

When: Salesforce Customer Identity Plus is generally available on July 20, 2021.

SEE ALSO:

Salesforce Help: Salesforce Customer Identity Plus (can be outdated or unavailable during release preview)

### Get More Guidance from the Multi-Factor Authentication Assistant

The Multi-Factor Authentication Assistant now includes a step that helps you preview multi-factor authentication (MFA) during your evaluation period. While you're getting ready to roll out MFA for Salesforce, we recommend turning it on for a few of your Salesforce champions. Conducting a preview or pilot with some trusted users lets you test the rollout process and collect early feedback on the MFA user experience. Use these insights to ensure there are no gaps in your rollout or change management plans. You can also determine the kinds of onboarding materials your users need when you're ready to launch MFA more broadly.

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

**When:** The Preview MFA step in the Multi-Factor Authentication Assistant is available for all Salesforce orgs on a rolling basis between May 7, 2021 and June 12, 2021. In sandboxes, the step's **Learn How** button isn't functional until June 12, 2021.

**How:** In Lightning Experience, from Setup, in the Quick Find box, enter *MFA*, then select **Multi-Factor Authentication Assistant**. The new Preview MFA step is available from the Evaluate MFA Options and Requirements stage in the Get Ready phase.

#### SEE ALSO:

Future Requirement to Enable Multi-Factor Authentication (MFA)

Salesforce Help: Meet the Multi-Factor Authentication Assistant (can be outdated or unavailable during release preview)
Salesforce Help: A Framework for Rolling Out and Supporting MFA (can be outdated or unavailable during release preview)

### Get Assigned Scopes with Access Tokens in the OAuth 2.0 JWT Bearer Flow

With the OAuth 2.0 JWT bearer flow, for connected apps that are preauthorized, standard and custom scopes are automatically returned with an access token. Previously, only standard scopes or scopes issued with former access tokens were returned.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions. Connected apps can be installed in all editions.

**How:** To automatically receive scopes assigned to a connected app during the OAuth 2.0 JWT bearer flow, preapprove the connected app by taking one of these steps.

- Assign the Admin approved users are pre-authorized Permitted Users policy to the connected app.
- Allowlist connected apps in your org from the Manage API Access page.

#### SEE ALSO:

Salesforce Help: OAuth 2.0 JWT Bearer Flow for Server-to-Server Integration (can be outdated or unavailable during release preview)

Salesforce Help: Manage OAuth Access Policies for a Connected App (can be outdated or unavailable during release preview)

Salesforce Help: Manage API Access (can be outdated or unavailable during release preview)

### Improve Performance Times of the OAuth 2.0 Hybrid App Flows

Improve performance times of the OAuth 2.0 hybrid app flows by directly bridging an access token into a web session without using frontdoor, jsp. With the hybrid app token flow, a hybrid app sets the domains' associated SIDs in the session cookies. It then directly bridges its own 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.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

**How:** During the hybrid app token flow and hybrid app refresh token flow, Salesforce returns three new parameters with the access token.

- cookie-clientSrc
- sidCookieName
- cookie-sid Client

The hybrid app uses the access token and these parameters to directly bridge a web session.

#### SEE ALSO:

Salesforce Help: OAuth 2.0 Authorization and Session Management for Hybrid Apps (can be outdated or unavailable during release preview)

### Give Authorized Access to Salesforce CDP Ingestion API Data

To authorize a connected app to access Salesforce CDP Ingestion API data, assign it the new OAuth scope: Access and manage your Salesforce CDP Ingestion API data. Customers can use the associated external app to upload and maintain external data sets in the Salesforce CDP platform.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer editions. Connected apps can be installed in all editions.

**How:** Assign the Access and manage your Salesforce CDP Ingestion API data scope to the connected app that represents your external app.



#### SEE ALSO:

Salesforce Help: Enable OAuth Settings for API Integration (can be outdated or unavailable during release preview)

### Redirect Expired Tabs to a Custom Logout URL

For Salesforce sessions, you can now redirect all expired tabs in your browser to a custom logout URL. Previously, the redirect URL wasn't applied to all expired tabs. Instead, only one tab was being redirected correctly, and the other tabs were redirected to Salesforce.com.

**Where:** This change applies to Salesforce Classic (not available in all orgs) in Essentials, Personal, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

How: Enable My Domain, and then enable Store the redirect logout URL in your local browser on the Session Settings page.



SEE ALSO:

Salesforce Help: Modify Session Security Settings (can be outdated or unavailable during release preview)

### Require Password Changes for Email Address Updates

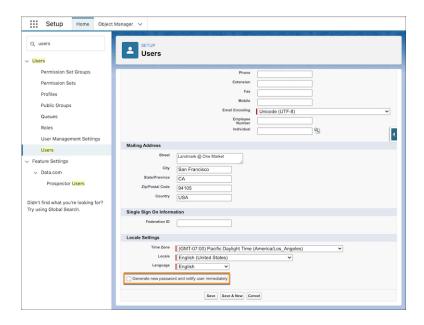
You can now require a user to change passwords before an admin-initiated email address update is approved. To quickly update your users' email addresses, you can change email addresses without requiring a password reset. But, for better security, you can require users to change their passwords before email address updates are approved.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

**How:** When you change a user's email address and the Generate new password and notify user immediately setting is enabled, the user receives a password reset link at their new email address. Users must create a new password to activate the new email address. Previously, the user's email address became active as soon as you saved the change.

When you change a user's email address and the Generate new password and notify user immediately setting is disabled, Salesforce sends a verification message to the user's new email address. The new email address becomes active as soon as the user clicks the verification link. This change applies only to admin-initiated email address updates. If a user changes their own email address, they still enter a verification code sent to their old address before the new address becomes active.

You can find the setting on the Users page in Setup.



#### SEE ALSO:

Salesforce Help: Edit Users (can be outdated or unavailable during release preview)
Salesforce Help: Considerations for Editing Users (can be outdated or unavailable during release preview)

# Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Enforced)

To protect user accounts against security threats, Salesforce now requires Experience Cloud users, partners, and customers to verify their email address changes. This update, first available in Winter '21, was scheduled for auto-enforcement in Spring '21, but was postponed to and is enforced in Summer '21.

**Where:** This change applies to Aura, LWR, and Visualforce sites sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Unlimited, and Developer editions.

**When:** This update was first available in Winter '21 and scheduled for auto-enforcement in Spring '21, but was postponed. 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.

**How:** This update enables the Require email confirmations for email address changes setting. With this setting enabled, when an Experience Cloud user changes their email address, Salesforce sends a verification email to the new address. After the user clicks the verification link in the message, the new address becomes active. You can disable this setting, but it's not recommended.

#### SEE ALSO:

Spring '21 Release Notes: Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Postponed)

Salesforce Help: Customize Email Sent from Experience Cloud Sites for Email Verification (can be outdated or unavailable during release preview)

Salesforce Help: Email Address Change Template (can be outdated or unavailable during release preview)

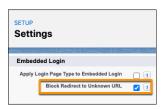
Release Update Announcements

### Block Customer Redirects to Unknown URLs

Protect your customers with a new Embedded Login setting that blocks redirects to unknown URLs. After customers successfully log in to your Experience Cloud site with Embedded Login, they're redirected to URLs that are located in the same host or domain as the site or that are allow-listed.

**Where:** This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Essentials, Unlimited, and Developer editions.

**How:** Use the Block Redirect to Unknown URL site setting to block redirects to unknown, possibly not secure, URLs. These URLs are provided in the state parameter of the Embedded Login OAuth response during a server-side callback. With this new setting, redirects are only allowed to a URL that is in the same host or domain as the site, or that is allow-listed in the Embedded Login salesforce-allowed-domains metatag.



#### SEE ALSO:

Salesforce Help: Prerequisites: Configure Your Experience Cloud Site and Website (can be outdated or unavailable during release preview)

Salesforce Help: Create an Embedded Login Server-Side Callback (can be outdated or unavailable during release preview)
Salesforce Help: Embedded Login Meta Tag Reference (can be outdated or unavailable during release preview)

# Identity Connect 2.1 and Identity Connect 3.0.1.2 Are Being Deprecated

As of the Winter '22 release, we're deprecating Identity Connect 2.1 and Identity Connect 3.0.1.2, and you can no longer download these versions of the product. We recommend that you upgrade to Identity Connect 7 when it becomes available.

**Where:** This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

When: Identity Connect 7 will be available by the end of July 2021.

**How:** When Identity Connect 7 is available, we provide a release note announcing its availability and a download link on the Identity Connect setup page. Before you upgrade to Identity Connect 7, make sure that you have the latest version of the Identity Connect managed package installed.

SEE ALSO:

Salesforce Help: Install Identity Connect (can be outdated or unavailable during release preview)

### One-Time Passwords Are Getting Longer in Winter '22

In Winter '22, to improve security, Salesforce is increasing the length of one-time passwords (OTPs) used for identity verification from five digits to six digits. If you have customizations that rely on six-digit OTPs, such as custom Apex implementations for multi-factor authentication (MFA) or passwordless login, change them before the Winter '22 release.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

When: Six-digit OTPs are enforced in Winter '22. Your customizations aren't affected in the Summer '21 release.

#### SEE ALSO:

Salesforce Help: Implement Multi-Factor Authentication with Apex (can be outdated or unavailable during release preview)
Salesforce Help: Choose Your Passwordless Login Implementation (can be outdated or unavailable during release preview)

### **Domains**

Deploy a My Domain, and enable enhanced domains to meet the latest browser requirements. Improve Search Engine Optimization (SEO) by redirecting your site traffic to your custom domain. Secure HTTPS connections are enforced and HSTS preloading is recommended for your domains.

#### IN THIS SECTION:

#### Enable Enhanced Domains (Update)

To comply with the latest browser and security standards, enable enhanced domains on your Salesforce org's My Domain. With enhanced domains, your company-specific My Domain name is included in your URLs, including Salesforce Sites and Experience Cloud sites. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Salesforce enhanced domains also comply with the latest browser requirements, allowing your users to access Salesforce using browsers that block third-party cookies. Because this update affects application URLs, including Experience Cloud sites, Salesforce Sites, and Visualforce pages, we recommend that you enable enhanced domains before it's enforced in Summer '22.

#### Redirect Site Traffic to Your Custom Domain

Improve your custom domain's Search Engine Optimization (SEO) by redirecting requests for your site's system-managed URL to the HTTPS custom domain, such as https://example.com, that serves the site. System-managed site base URLs end in .force.com, .my.salesforce-sites.com, or .my.site.com. Redirecting traffic from these URLs to your branded domain improves the user experience and helps search engines properly rank your custom domain.

#### Secure HTTPS Connections Are Enforced in Domains

To better protect your data, Salesforce disabled HTTP-only domains. Settings that enforce HTTPS connections or upgrade HTTP requests were enabled and then removed in Summer '21 because they're required and enforced by default. We also renamed our non-HTTPS domain configuration option to reflect that it's for temporary use only.

#### Allow Only Secure Connections to Your Domain with HSTS Preloading

As a security best practice, enable and submit your domain for HTTP Strict Transport Security (HSTS) preloading so that HTTPS connections are always used in supported browsers. Currently, all HTTP requests are redirected to HTTPS. However, connections are still vulnerable during that redirection.

#### 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 org ID. 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.

### **Enable Enhanced Domains (Update)**

To comply with the latest browser and security standards, enable enhanced domains on your Salesforce org's My Domain. With enhanced domains, your company-specific My Domain name is included in your URLs, including Salesforce Sites and Experience Cloud sites. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Salesforce enhanced domains also comply with the latest browser requirements, allowing your users to access Salesforce using browsers that block third-party cookies. Because this update affects application URLs, including Experience Cloud sites, Salesforce Sites, and Visualforce pages, we recommend that you enable enhanced domains before it's enforced in Summer '22.

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

**When:** Enhanced domains are available in Hyperforce orgs and in orgs with a deployed My Domain routed through Salesforce Edge Network. They aren't available in scratch orgs or in Developer Edition orgs. For more information on the availability of this feature, join the discussion on the My Domain and Enhanced Domains group in the Trailblazer Community.

Salesforce enforces this update in Summer '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

**Why:** When you enable enhanced domains, all application URLs start with your My Domain name, and instance names are removed. The domain suffix (the part after the My Domain name) changes for Experience Cloud sites, Salesforce Sites, content files, Site.com Studio, Experience Builder, and Visualforce URLs. And sandbox URLs include the word sandbox, making them easy to identify.

Here are some My Domain URL formats with enhanced domains. The login URL is the same as without enhanced domains, but the rest of the URLs change.

URL TYPE	ENHANCED DOMAIN FORMAT
Login	MyDomainName.my.salesforce.com
Content files	MyDomainName.file.force.com
Experience Cloud sites	MyDomainName.my.site.com
Experience Builder	MyDomainName.builder.salesforce-experience.com
Salesforce Sites	MyDomainName.my.salesforce-sites.com
Visualforce pages	MyDomainNamePackageName.vf.force.com
Sandbox login	MyDomainNameSandboxName.sandbox.my.salesforce.com
Experience Cloud sites in a sandbox org	MyDomainNameSandboxName.sandbox.my.site.com

For a full list of URL formats and URL format changes when deploying a My Domain with enhanced domains, see My Domain URL Formats in Salesforce Help.

**How:** We recommend testing all My Domain changes in a sandbox before updating production.

To complete this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Enable Enhanced Domains, follow the testing and activation steps.

SEE ALSO:

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

Salesforce Help: My Domain URL Formats (can be outdated or unavailable during release preview)

Release Update Announcements

### Redirect Site Traffic to Your Custom Domain

Improve your custom domain's Search Engine Optimization (SEO) by redirecting requests for your site's system-managed URL to the HTTPS custom domain, such as https://example.com, that serves the site. System-managed site base URLs end in .force.com, .my.salesforce-sites.com, or .my.site.com. Redirecting traffic from these URLs to your branded domain improves the user experience and helps search engines properly rank your custom domain.

**Where:** This change applies to Experience Cloud sites and Salesforce Sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** From Setup, in the Quick Find Box, enter Sites, then select **Sites**. In the Sites list, click the site name, then click **Edit**. Select **Redirect to custom domain** and save your changes.

If multiple custom domains serve the site, requests are routed to the site's primary custom URL only if it's an HTTPS custom domain. Otherwise, requests are redirected to the first HTTPS custom domain associated with this site, in alphanumeric order. If no HTTPS custom domain serves the site, this option has no effect.

SEE ALSO:

Salesforce Help: Manage Your Domains (can be outdated or unavailable during release preview)

Salesforce Help: Create and Edit Salesforce Sites (can be outdated or unavailable during release preview)

Salesforce Help: Configure a Custom Domain for Your Experience Cloud Site (can be outdated or unavailable during release preview)

### Secure HTTPS Connections Are Enforced in Domains

To better protect your data, Salesforce disabled HTTP-only domains. Settings that enforce HTTPS connections or upgrade HTTP requests were enabled and then removed in Summer '21 because they're required and enforced by default. We also renamed our non-HTTPS domain configuration option to reflect that it's for temporary use only.

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

**Why:** HTTPS uses Transport Layer Security (TLS), which makes it more secure than HTTP. TLS is designed to facilitate data security and privacy for communications over the internet.

Custom domains allow you to use a domain that you own to host your externally facing content through Salesforce Sites and Experience Cloud sites. On the Domain Details page, we enabled and removed the Enable Strict Transport Security headers setting, so all HTTP requests are redirected to HTTPS. We recommend that you select one of the options to serve your domain over HTTPS. However, if you're in the process of configuring DNS or adding a subdomain whose CNAME points to another service, you can select the Temporary non-HTTPS domain option. Previously, this option was: Salesforce serves the domain over HTTP without support for HTTPS access.

For Salesforce Sites and Experience Cloud sites that aren't served on a custom domain, we upgraded all requests to HTTPS. On the Site Details page, we removed the Require Secure Connections (HTTPS) and Upgrade all requests to HTTPS settings because they're enforced.

The HSTS for Salesforce Sites and Experience Cloud Sites setting on the Sessions Setting page was also enabled and removed.

Because Health Check score calculations used the removed settings, this change can have a minor impact on your score.

#### SEE ALSO:

Salesforce Help: Options to Serve a Custom Domain (can be outdated or unavailable during release preview)

Salesforce Help: How Is the Health Check Score Calculated? (can be outdated or unavailable during release preview)

Secure HTTPS Connections to Third-Party Domains Are Enforced

Allow Only Secure Connections to Your Domain with HSTS Preloading

Spring '21 Release Notes: Enable HTTPS on Your Domains

### Allow Only Secure Connections to Your Domain with HSTS Preloading

As a security best practice, enable and submit your domain for HTTP Strict Transport Security (HSTS) preloading so that HTTPS connections are always used in supported browsers. Currently, all HTTP requests are redirected to HTTPS. However, connections are still vulnerable during that redirection.

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

**How:** From Setup, in the Quick Find box, enter *Domains*, and then select **Domains**. Edit the custom domain. On the Domain Details page, select **Allow HSTS preloading registration**. Then, go to <a href="https://hstspreload.org">https://hstspreload.org</a> and submit your domain. This setting is automatically enabled in domains created or edited in Summer '21 or later, but HSTS preloading isn't enabled until you submit the domain on that website.

Regardless of whether the setting is enabled, we only modify the HSTS headers of domains that are eligible for registration. For information on format requirements, see Add a Domain in Salesforce Help.

#### SEE ALSO:

Salesforce Help: Add a Domain (can be outdated or unavailable during release preview)
Secure HTTPS Connections Are Enforced in Domains

# 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 org ID. 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. 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 ID. If you prefer to use a different My Domain name, you can change it.

#### SEE ALSO:

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

Winter '21 Release Notes: Deploy a My Domain (Update)

Release Update Announcements

### Salesforce Shield

Use the new Real-Time Event Monitoring Permission Set Event (generally available) to monitor permission changes and even make Transaction Security policies for user permissions. The APITotalUsage event log file type helps you track unused API versions. And the new USER\_TYPE field helps identify if users associated with events are authenticated or guest users. Shield Platform Encryption now supports the User Email field (beta) and contact point fields.

#### IN THIS SECTION:

### Shield Platform Encryption

By popular demand, Shield Platform Encryption for User Email (beta) offers an extra layer of protection for user emails used throughout your Salesforce deployment. You can also encrypt addresses, email addresses, and phone numbers for the points of contact associated with individual and person accounts.

#### **Event Monitoring**

Some Event Log File types now include a USER\_TYPE field to help you identify whether users associated with events are authenticated or guest users. The new API Total Usage event type gives admins insights into which orgs use retired API versions. And, use the Security Center app to review metrics about Threat Detection events (beta).

# Shield Platform Encryption

By popular demand, Shield Platform Encryption for User Email (beta) offers an extra layer of protection for user emails used throughout your Salesforce deployment. You can also encrypt addresses, email addresses, and phone numbers for the points of contact associated with individual and person accounts.

#### IN THIS SECTION:

#### **Encrypt Contact Point Information**

Contact information is a critical part of many business processes. It's personally identifiable, which can require extra layers of protection. Now you can encrypt the addresses, email addresses, and phone numbers for the points of contact associated with individual and person accounts.

#### Encrypt Your Users' Email Addresses (Beta)

In spite of all of the apps that help you communicate in real time, email remains the lifeblood of most businesses. Email addresses are used everywhere, from logging in to validation processes and everything in between. Shield Platform Encryption now offers you an extra layer of protection for user emails when they're stored at rest. User Email supports probabilistic and case-insensitive deterministic encryption schemes, helping you preserve critical business functionality.

### **Encrypt Contact Point Information**

Contact information is a critical part of many business processes. It's personally identifiable, which can require extra layers of protection. Now you can encrypt the addresses, email addresses, and phone numbers for the points of contact associated with individual and person accounts

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 Shield Platform Encryption add-on subscription.

**How:** From Setup, on the Encryption Policy page, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply the probabilistic encryption to these fields.

- Contact Point Address—Address
- Contact Point Email—Email address
- Contact Point Phone—Telephone number

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt? (can be outdated or unavailable during release preview)

### Encrypt Your Users' Email Addresses (Beta)

In spite of all of the apps that help you communicate in real time, email remains the lifeblood of most businesses. Email addresses are used everywhere, from logging in to validation processes and everything in between. Shield Platform Encryption now offers you an extra layer of protection for user emails when they're stored at rest. User Email supports probabilistic and case-insensitive deterministic encryption schemes, helping you preserve critical business functionality.

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



**Note:** As a beta feature, Shield Platform Encryption for User Email 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 Shield Platform Encryption for User Email in the Shield group in the Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

Who: Available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

**How:** From Setup, in the Quick Find box, enter *Encryption Policy*, and then select **Encrypt Fields**. Click **Edit**, select **Email** under the User section, and choose your encryption scheme.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt? (can be outdated or unavailable during release preview)
Salesforce Help: General Shield Platform Encryption Considerations (can be outdated or unavailable during release preview)

### **Event Monitoring**

Some Event Log File types now include a USER\_TYPE field to help you identify whether users associated with events are authenticated or guest users. The new API Total Usage event type gives admins insights into which orgs use retired API versions. And, use the Security Center app to review metrics about Threat Detection events (beta).

#### IN THIS SECTION:

#### Get Information About User Type in the EventLogFile

Certain Event Log File types now include a USER\_TYPE field, which can, for example, tell you whether the user associated with an event is authenticated or is a guest user.

#### Track API Version Use with the API Total Usage Event

Gain visibility into API version use with the API Total Usage event type in the EventLogFile object. This event type helps you streamline your API version management strategy and plans. You can also use it to monitor your general API consumption. This event records calls to SOAP, Bulk v1, and REST API requests up to version 30.0. Data is retained for 24 hours.

#### See Threat Detection Metrics in Security Center (Beta)

Detailed threat event information is critical for any response to potentially malicious activity. But sometimes you need aggregated metrics and summary information about the threats that affect your organization. The Security Center app now offers an easy way to get aggregated metrics about each category of threat event gathered by the Threat Detection app. Security Center updates in near real time, giving you a complete, accurate, and timely picture of your security posture.

#### Monitor Changes to Permission Sets and Permission Set Groups (Pilot)

To protect your data and prevent unauthorized access, monitor permission changes made in permission sets and permission set groups using Real-Time Event Monitoring. Use PermissionSetEvent to monitor when permissions are added or removed from permission sets and permission set groups, or when user assignments for these features change. You can also create transaction security policies to block the assignment of critical permissions.

### Get Information About User Type in the EventLogFile

Certain Event Log File types now include a USER\_TYPE field, which can, for example, tell you whether the user associated with an event is authenticated or is a guest user.

**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:** Event Monitoring is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions and use the EventLogFile to monitor events.

**How:** The USER TYPE field is available for these event types.

- Apex REST API
- Apex SOAP
- Apex Trigger
- API
- Asynchronous Report
- Aura Request
- Console
- Login
- Multiblock Report
- One Commerce Usage
- Queued Execution
- Report
- REST API
- Sites
- URI

Visualforce Request

SEE ALSO:

Object Reference: EventLogFile Supported Event Types (can be outdated or unavailable during release preview)

New and Changed Objects

New and Changed Standard Platform Events

### Track API Version Use with the API Total Usage Event

Gain visibility into API version use with the API Total Usage event type in the EventLogFile object. This event type helps you streamline your API version management strategy and plans. You can also use it to monitor your general API consumption. This event records calls to SOAP, Bulk v1, and REST API requests up to version 30.0. Data is retained for 24 hours.

**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:** The API Total Usage Event is free to all customers. Customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions can use the EventLogFile to monitor events.

SEE ALSO:

Object Reference: API Total Usage (can be outdated or unavailable during release preview) New and Changed Objects

### See Threat Detection Metrics in Security Center (Beta)

Detailed threat event information is critical for any response to potentially malicious activity. But sometimes you need aggregated metrics and summary information about the threats that affect your organization. The Security Center app now offers an easy way to get aggregated metrics about each category of threat event gathered by the Threat Detection app. Security Center updates in near real time, giving you a complete, accurate, and timely picture of your security posture.

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

Who: This change is available to customers who purchase Security Center and Threat Detection add-on subscriptions.



**Note**: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

Monitor Security Threats to Your Environment with Threat Detection (Beta)

### Monitor Changes to Permission Sets and Permission Set Groups (Pilot)

To protect your data and prevent unauthorized access, monitor permission changes made in permission sets and permission set groups using Real-Time Event Monitoring. Use PermissionSetEvent to monitor when permissions are added or removed from permission sets and permission set groups, or when user assignments for these features change. You can also create transaction security policies to block the assignment of critical permissions.

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



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

Who: Event Monitoring is available to customers who already purchased Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** To be nominated for this pilot, contact Salesforce. After the pilot is enabled, from Setup, in the Quick Find box, enter *Event Manager*, then select **Event Manager**. For Permission Set Event (Pilot), use the action menu to enable storage and streaming.

The event data from PermissionSetEvent is stored in PermissionSetEventStore. You can use PermissionSetEventStore to create transaction security policies using Condition Builder or Apex that block View All Data, Modify All Data, and Customize Application user permissions assignments.

#### SEE ALSO:

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

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

Salesforce Help: PermissionSetEventStore Policies (Pilot) (can be outdated or unavailable during release preview)

### **Security Center**

New date range fields on metric detail pages give you flexibility over which metric details you see at once. And Security Center now integrates with Event Monitoring Threat Detection (beta). You can see the total number of events per threat type, along with detailed information about each threat event without leaving the Security Center app. Threat event metrics update in near real time, offering you a more timely and complete view of your security posture.

#### IN THIS SECTION:

#### Monitor Security Threats to Your Environment with Threat Detection (Beta)

Quickly get a summary of all possible detected threat events in your connected tenants. The Threat Detection app monitors your tenants for four types of security threats and provides information to you in near real time, in a single, aggregated view.

#### Pick a Date Range to View Metric Changes Over Time

View changes to metric details that occurred during a chosen range of dates. This change allows you to see metric trends and changes over time not previously available with the single-day view.

### Monitor Security Threats to Your Environment with Threat Detection (Beta)

Quickly get a summary of all possible detected threat events in your connected tenants. The Threat Detection app monitors your tenants for four types of security threats and provides information to you in near real time, in a single, aggregated view.

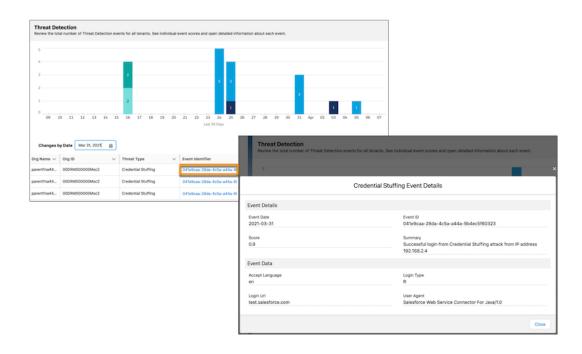
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change is available to customers who purchase Security Center and Threat Detection add-on subscriptions.



**Note:** As a beta feature, Threat Detection Integration with Security Center 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:** From the Security Center page of your parent tenant, click **Threat Detection**. Below the 30-day summary graph, choose a date. Click the Threat Identifier value to see details of a detected event. The four possible security threats are: Credential Stuffing, API Anomaly, Session Hijacking, and Report Anomaly.



SEE ALSO:

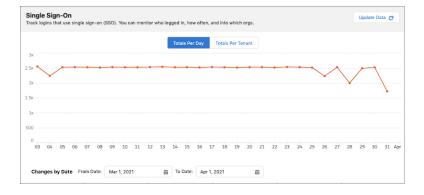
Salesforce Help: Review Threat Detection Events (Beta) (can be outdated or unavailable during release preview)

# Pick a Date Range to View Metric Changes Over Time

View changes to metric details that occurred during a chosen range of dates. This change allows you to see metric trends and changes over time not previously available with the single-day view.

**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, select a From Date and To Date. The From Date must be earlier than the To Date, or they can be the same day to view details of a single day.



#### SEE ALSO:

Salesforce Help: Review Detailed Metric Data (can be outdated or unavailable during release preview)

# Other Security Changes

Improve load times for authenticated site visitors through a new Visualforce page caching option. Update your site guest users to the latest license. Secure HTTPS connections are enforced for third-party domain connections, and you can decide what types of cookies are allowed on your Salesforce Sites.

#### IN THIS SECTION:

#### Cache Your Site's Visualforce Pages for Authenticated Users

Improve your authenticated users' experience by caching your site's Visualforce pages on their web browsers to reduce page load times. By default, proxy servers cache publicly available pages only for unauthenticated guest users. Now you can disable that proxy server caching and determine whether to cache each page on the end user's web browser instead. The page-specific caching applies to authenticated and unauthenticated users.

#### Update Site Guest Users to the Latest License

Some Experience Cloud sites and Salesforce Sites created before the Spring '21 release can have an outdated license associated with the site's guest users. If your site's guest users have the standard guest user license, update them to the provisioned guest user license, which gets updated automatically and has more consistent permissions.

#### Secure HTTPS Connections to Third-Party Domains Are Enforced

HTTPS connections are required to connect to third-party domains, and HTTP connections are no longer permitted. The Require secure connections (HTTPS) for all third-party domains setting on the Session Settings Setup page was removed because it can't be disabled. The Require secure connections (HTTPS) setting was also removed because it was previously enabled and can't be disabled.

#### Set Preferences for Allowed Cookies for Salesforce Sites

A new Salesforce Sites setting lets you decide what types of cookies are allowed on your site by default.

#### View Source IP Addresses in Your Private Connect Inbound Connections

You can now easily view the ranges of source IP addresses allocated to your inbound network connections by the Salesforce Transit VPC in your cloud provider, such as AWS. Use these IP addresses with Salesforce security features to get more protection. For example, you can specify that users can log in from these IP addresses without receiving a login challenge. Or add these source IP addresses to the list of restricted addresses that users can access Salesforce from.

#### Private Connect Is HIPAA Compliant

Your Health Insurance Portability and Accountability Act (HIPAA)-regulated Salesforce customers can now use Private Connect and maintain HIPAA compliance by signing the Salesforce Business Associate Addendum (BAA). Regulated Health Care Salesforce customers can rest assured that their customer data, including electronic protected health information (ePHI), is accessible exclusively through the private internet.

#### Add More Trusted Domains for Inline Frames

You can now add up to 512 domains where you allow iframes of your Visualforce pages, site pages, surveys, or embedded services. Previously, the limit was 256 domains.

### Cache Your Site's Visualforce Pages for Authenticated Users

Improve your authenticated users' experience by caching your site's Visualforce pages on their web browsers to reduce page load times. By default, proxy servers cache publicly available pages only for unauthenticated guest users. Now you can disable that proxy server caching and determine whether to cache each page on the end user's web browser instead. The page-specific caching applies to authenticated and unauthenticated users.

**Where:** This change applies to Visualforce pages for Experience Cloud sites and Salesforce Sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** From Setup, in the Quick Find Box, enter Sites, then select **Sites**. In the Sites list, click the site name, then click **Edit**. Deselect **Cache public Visualforce pages** and save your changes. Then use each Visualforce page's cache attribute to control whether the page is cached in the end user's web browser.

SEE ALSO:

Salesforce Help: Configure Site Caching (can be outdated or unavailable during release preview)

### Update Site Guest Users to the Latest License

Some Experience Cloud sites and Salesforce Sites created before the Spring '21 release can have an outdated license associated with the site's guest users. If your site's guest users have the standard guest user license, update them to the provisioned guest user license, which gets updated automatically and has more consistent permissions.

**Where:** This change applies to Experience Cloud sites and Salesforce Sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Because permissions in the outdated guest user license can vary between Salesforce orgs, updating this license can increase or restrict which permissions the guest users receive. For example, admins can allow users with the provisioned guest user license to access the Survey object, but this permission isn't available with the outdated license. In some cases, guest users lose permissions after the license is updated.

**How:** To see if you have users requiring this update, from Setup, in the Quick Find Box, enter Sites, then select **Sites**. In the Sites list, click the site name, then click **Edit**. The **Update Guest User Licensing** button appears only if users have the outdated license. Before clicking that button in production, we recommend testing in a sandbox to ensure unauthenticated guest users can access the necessary features in your sites.

In a sandbox, click **Update Guest User Licensing** for each site with that button. Test that you can access the expected pages, including login pages, as a guest user. After you make sure that all functionality within your sites works as before, you can click the **Update Guest User Licensing** button in production for your sites.



**Important**: This licensing change can't be undone.

# Secure HTTPS Connections to Third-Party Domains Are Enforced

HTTPS connections are required to connect to third-party domains, and HTTP connections are no longer permitted. The Require secure connections (HTTPS) for all third-party domains setting on the Session Settings Setup page was removed because it can't be disabled. The Require secure connections (HTTPS) setting was also 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 uses Transport Layer Security (TLS), which makes it more secure than HTTP. TLS is designed to facilitate data security and privacy for communications over the internet.

This change affects third-party domain content served within Salesforce. For example, you can't embed HTTP-only content within a Visualforce page. However, hyperlinks to HTTP-only domains on your Visualforce pages aren't affected. For the best security, we recommend that you update any hyperlinks to use HTTPS 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. When this setting is enforced, these assets don't always render correctly.

Because Health Check score calculations used the removed settings, this change can have a minor impact on your score.

#### SEE ALSO:

Secure HTTPS Connections Are Enforced in Domains

Salesforce Help: How Is the Health Check Score Calculated? (can be outdated or unavailable during release preview)

Spring '21 Release Notes: Require Secure HTTPS Connections for All Third-Party Domains

### Set Preferences for Allowed Cookies for Salesforce Sites

A new Salesforce Sites setting lets you decide what types of cookies are allowed on your site by default.

**Where:** This change applies to Salesforce Sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** From Setup, in the Quick Find box, enter Sites, and select **Sites**. To create a new site, click **New**, or, to modify an existing site, click **Edit**. To only allow required Salesforce-supplied cookies within the site, select **Allow only required cookies for this site**. If you don't turn on the setting, your site allows all cookies, including the required, functional, and advertising types.

SEE ALSO:

Salesforce Help: Create and Edit Salesforce Sites (can be outdated or unavailable during release preview)

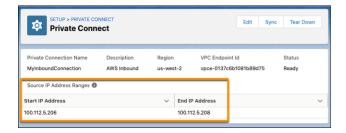
### View Source IP Addresses in Your Private Connect Inbound Connections

You can now easily view the ranges of source IP addresses allocated to your inbound network connections by the Salesforce Transit VPC in your cloud provider, such as AWS. Use these IP addresses with Salesforce security features to get more protection. For example, you can specify that users can log in from these IP addresses without receiving a login challenge. Or add these source IP addresses to the list of restricted addresses that users can access Salesforce from.

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

**Why:** Previously, these AWS IP addresses were hidden from Salesforce administrators. As a result, Private Connect admins couldn't use many of the Salesforce security features because they require known IP addresses. See Establish an Inbound Connection with AWS for the full list of security features that are now supported.

**How:** From Setup, in the Quick Find box, enter *Private Connect*, and then select **Private Connect**. Inbound connection names are now links that you click to see the details of a connection, including the ranges of AWS source IP addresses.



The source IP addresses for a provisioned inbound network connection don't change until you tear down and reprovision it. So you can safely use the IP addresses in the Salesforce security features.

If you created an inbound connection before the Summer '21 release, its source IP address table isn't automatically populated with IP address ranges. There are two ways to populate the table:

- To share a default pool of IP addresses, click Sync. These addresses aren't unique to your connection.
- To receive dedicated and unique IP address ranges, tear down and reprovision your connection.

#### SEE ALSO:

Salesforce Help: Secure Cross-Cloud Integrations with Private Connect (can be outdated or unavailable during release preview)

Trailhead: Salesforce Private Connect for AWS

Salesforce Help: Set Trusted IP Ranges for Your Organization (can be outdated or unavailable during release preview)

Salesforce Help: Restrict Access to Trusted IP Ranges for a Connected App (can be outdated or unavailable during release preview)

### Private Connect Is HIPAA Compliant

Your Health Insurance Portability and Accountability Act (HIPAA)-regulated Salesforce customers can now use Private Connect and maintain HIPAA compliance by signing the Salesforce Business Associate Addendum (BAA). Regulated Health Care Salesforce customers can rest assured that their customer data, including electronic protected health information (ePHI), is accessible exclusively through the private internet.

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

#### SEE ALSO:

Salesforce Help: Secure Cross-Cloud Integrations with Private Connect (can be outdated or unavailable during release preview)
Salesforce Private Connect - Business Associate Addendum Restrictions

### Add More Trusted Domains for Inline Frames

You can now add up to 512 domains where you allow iframes of your Visualforce pages, site pages, surveys, or embedded services. Previously, the limit was 256 domains.

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

**How:** For Visualforce pages, surveys, or embedded services, from Setup, in the Quick Find box, enter *Session Settings*, and then select **Session Settings**. Under Trusted Domains for Inline Frames, click **Add Domain**.

For Experience Cloud or Salesforce Sites pages, you add trusted domains on the Site Detail page.

#### SEE ALSO:

Salesforce Help: Modify Session Security Settings (can be outdated or unavailable during release preview)

Salesforce Help: Enable Clickjack Protection in Experience Cloud Sites (can be outdated or unavailable during release preview)

Salesforce Help: Allow Surveys to Be Framed Within the Chat Window on Websites (can be outdated or unavailable during release preview)

Visualforce Developer Guide: Putting Visualforce Pages on External Domains (can be outdated or unavailable during release preview)

### Service

Enjoy new Service Cloud tools that help you scale and streamline your business to provide a unified service experience powered by automation. Increase your time to value with the Service Setup Assistant, which creates an optimized Service app for you and your team and now takes care of more key setup steps. Use Workforce Engagement to streamline your contact center operation with data-driven shift planning tools and a win-win feature that lets employees grow and apply their skills (hint: it involves Trailhead). Get the full power and potential of Service Cloud Voice by integrating it with the telephony provider of your choice. Learn when Einstein refreshes replies for your chat agents, and track Einstein's progress in building your predictive model for Einstein Case Classification.

#### IN THIS SECTION:

#### Service Setup

We heard you liked getting started with an out-of-the-box Service app, so the Service Setup Assistant now takes care of even more tasks to make setup easier. The Assistant gives you a default help center, automated case email notifications, and sample data such as macros and flow recommendations to help you get to know Service Cloud best practices. It also completes key setup steps for Knowledge and walks you through giving your team access to the features they need.

#### Workforce Engagement

Run a better contact center to help your business, employees, and customers all win. Your business wins with our new data-driven planning tools that let you meet workload demands more efficiently. Your employees win with flexible scheduling tools, and better career ownership and growth opportunities. Your customers win because service is swifter and the agents who support them are the best match.

#### Channels

Integrate your choice of supported telephony systems now that Service Cloud Voice with Partner Telephony is generally available. Build customized solutions for customers with the Voice Toolkit API and Lightning web components. Give agents a set amount of time to wrap up after a call with After Conversation Work (beta). There's an upgrade for users restricting cookies to keep their Embedded Chat conversations going. Send multimedia messages on channels that use toll-free numbers.

#### Routing

Efficiently route work to the most qualified agents with Omni-Channel Flow (beta). Status-based and tab-based capacity limits both changed to 100.

#### Einstein for Service

We're always on the lookout for ways that Einstein can make you and your agents more productive. Einstein Case Wrap-Up, now generally available, predicts case field values when agents finish customer chats. And we notify you when Einstein Reply Recommendations refreshes reply templates so you can publish new and updated replies for agents to use.

#### Case Management

Updates to the Case Email quick action let you send longer emails, use Bulk Macros, and now offer full compatibility with right to left language keyboards. Generate a custom help center to let customers do more for themselves. Or streamline agent workflows with prebuilt case productivity enhancements like Lightning template compatibility with Web-to-Case, Support Settings, and Case Assignment Rules.

#### Knowledge

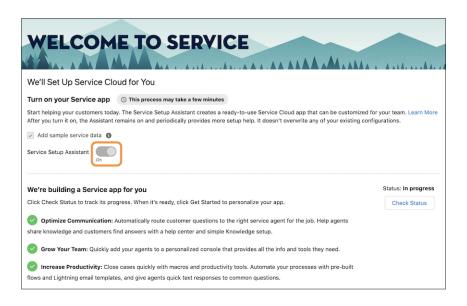
Let the Service Setup Assistant complete key Knowledge setup steps for you. Enjoy more space to create or update articles with the expanded size of the CKEditor, which also supports right-to-left languages. Help your agents quickly find articles that are most relevant to them with Einstein Article Recommendations. Try out Einstein Search for Knowledge (pilot).

# Service Setup

We heard you liked getting started with an out-of-the-box Service app, so the Service Setup Assistant now takes care of even more tasks to make setup easier. The Assistant gives you a default help center, automated case email notifications, and sample data such as macros and flow recommendations to help you get to know Service Cloud best practices. It also completes key setup steps for Knowledge and walks you through giving your team access to the features they need.

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

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



If it's your first time using the Service Setup Assistant, turn it on. When your Service app is ready, click **Get Started**.

If you already used the Assistant to create your Service app, click **Update My Service App** in the banner at the top of the screen to get the new features. Here's what new:

- Sample data: Leave Add sample service data selected to get a handful of sample cases, flow recommendations, macros, knowledge articles, and quick text messages. The sample data shows you some best practices for working with Service Cloud, and you can customize or delete it to your preference.
- **Case email notifications:** With the help of Lightning email templates and preconfigured support settings, automatically email the case contact when a case is created, updated, assigned, and closed.
- **User access:** When you add users, choose the features they need access to. The Assistant assigns them the relevant feature licenses and permission sets based on what your company has purchased.
- **Prebuilt help center:** Add knowledge articles and branding, and then publish the help center to give customers a place to resolve straightforward questions without contacting your support team. For complicated issues, customers can use a simple web form to create a case.
- **Knowledge setup:** Get an optimized record page for knowledge articles that includes a compact layout, Article Tools and Feed tabs, and a Compare Versions component. A global action makes it easier for agents to create articles, and prebuilt Channel Mapping configurations give agents article-specific responses to use when inserting articles into emails and chats.

Some of the features that the Service Setup Assistant sets up for you require extra licenses or configuration steps. If you don't have a license needed for a particular task, the task is skipped.

#### SEE ALSO:

Generate a Custom Help Center to Guide Customers to Solutions

Let the Service Setup Assistant Kick Off Your Knowledge Journey

Salesforce Help: Features Included in the Service Setup Assistant (can be outdated or unavailable during release preview)

# **Workforce Engagement**

Run a better contact center to help your business, employees, and customers all win. Your business wins with our new data-driven planning tools that let you meet workload demands more efficiently. Your employees win with flexible scheduling tools, and better career ownership and growth opportunities. Your customers win because service is swifter and the agents who support them are the best match.

#### IN THIS SECTION:

#### Use Historical Data to Predict Your Workload with Intelligent Forecasting

Many contact centers are challenged by siloed data, inaccurate algorithms, or cumbersome spreadsheets when building forecasts. Intelligent Forecasting solves these problems with machine learning and an intuitive report builder. Aggregate your contact center's historical data in a Workload History. Build an Intelligent Forecast from that history to slice your workload by time, region, skill, and custom data.

#### Generate Scheduling Requirements and Ensure Shift Coverage with Omni-Channel Planning

Predict shift scheduling requirements and make data-driven staffing decisions. Identify skill gaps in your workforce so you can better prepare agents to support customers. Compare your scheduled shifts to the requirements of the forecast to ensure coverage across channels. Slice this data by time or skills required.

#### Manage Agents, Shifts, and Time with Shift Scheduling

Shift scheduling enhancements ensure that your customers are supported by agents with the right skills and bandwidth to provide excellent service. Batch or manually assign shifts based on your business' unique scheduling rules and your agents' preferences. Approve agents' time sheets and absences.

### Give Agents Ownership with Agent Empowerment Tools

Because happy agents make customers happy, now there are Workforce Engagement features just for agents. Retain your high performers with career development opportunities, organization enhancements, and greater ownership over their schedules.

# Use Historical Data to Predict Your Workload with Intelligent Forecasting

Many contact centers are challenged by siloed data, inaccurate algorithms, or cumbersome spreadsheets when building forecasts. Intelligent Forecasting solves these problems with machine learning and an intuitive report builder. Aggregate your contact center's historical data in a Workload History. Build an Intelligent Forecast from that history to slice your workload by time, region, skill, and custom data.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

**When:** You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

**Who:** Users with the Workforce Engagement Analyst permission set can view, create, edit, and delete a Workload History and an Intelligent Forecast.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup and select your data model preference. Follow the configuration steps for Intelligent Forecasts.

Open **Intelligent Forecasts** in the App Launcher, and click **New**. Walk through the steps to create a Workload History, then walk through the steps to create an Intelligent Forecast from the Workload History that you created.

# Generate Scheduling Requirements and Ensure Shift Coverage with Omni-Channel Planning

Predict shift scheduling requirements and make data-driven staffing decisions. Identify skill gaps in your workforce so you can better prepare agents to support customers. Compare your scheduled shifts to the requirements of the forecast to ensure coverage across channels. Slice this data by time or skills required.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

**Who:** Users with the Workforce Engagement Analyst permission set can view, create, and edit Omni-Channel Plans. They can also view, create, edit, and delete Workload Histories and Intelligent Forecasts.

**Why:** Workforce Engagement is all about retaining and upskilling your agents. Omni-Channel Planning helps you understand exactly how many agents you need on shifts and what skills they need in order to provide excellent customer support.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for workload history and intelligent forecasting, and follow the configuration steps for Omni-Channel Planning.

Create a Workload History, then create an Intelligent Forecast from that Workload History. Open the Intelligent Forecast, and click **Add Omni-Channel Plan**. Follow the steps to create your Omni-Channel Plan.

Create shifts to compare available and assigned shifts in your plan.

# Manage Agents, Shifts, and Time with Shift Scheduling

Shift scheduling enhancements ensure that your customers are supported by agents with the right skills and bandwidth to provide excellent service. Batch or manually assign shifts based on your business' unique scheduling rules and your agents' preferences. Approve agents' time sheets and absences.

#### IN THIS SECTION:

#### Assign Many Agents to Shifts At Once with Batch Assignment

Ensure that your customers are supported by agents with the right skills and bandwidth to provide excellent service. Batch assign up to 200 shifts at a time, based on your business' unique scheduling rules and your agents' preferences. Meet scheduling demands swiftly with your existing workforce.

#### Manually Assign Agents to Shifts with Get Candidates

Adjust shift assignments if someone calls in sick or for another unforeseen event. Use the Get Candidates feature to manually assign one shift to one agent at a time. Review a list of candidates who meet your scheduling rules and manually select the candidate whose personal scheduling preferences are a strong match.

#### Approve Time Sheets and Time-Off Requests

Gain oversight into agents' time sheets and time-off requests. Approve or deny submissions from an individual agent's service resource profile or from the Time Sheets or Resource Absences tabs.

### Assign Many Agents to Shifts At Once with Batch Assignment

Ensure that your customers are supported by agents with the right skills and bandwidth to provide excellent service. Batch assign up to 200 shifts at a time, based on your business' unique scheduling rules and your agents' preferences. Meet scheduling demands swiftly with your existing workforce.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

Who: Users with the Workforce Engagement Schedule Coordinator permission set can batch assign shifts.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for shift scheduling.

To batch assign shifts to agents, open **Shifts** in the App Launcher, and set the tab to **Table View**. Select all or check a box for each shift you want to assign. Click **Assign**, then **Assign Shifts**.

### Manually Assign Agents to Shifts with Get Candidates

Adjust shift assignments if someone calls in sick or for another unforeseen event. Use the Get Candidates feature to manually assign one shift to one agent at a time. Review a list of candidates who meet your scheduling rules and manually select the candidate whose personal scheduling preferences are a strong match.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

Who: Users with the Workforce Engagement Schedule Coordinator permission set can use the Get Candidates feature.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for shift scheduling.

To manually assign shifts to agents, open **Shifts** in the App Launcher. Set the list view to **All Shifts** and set the Display As icon to **Schedule** view. Hover over a shift, and click **Get Candidates**. After reviewing each candidate's match preference, select an agent to assign the shift to. Submit your changes.

### Approve Time Sheets and Time-Off Requests

Gain oversight into agents' time sheets and time-off requests. Approve or deny submissions from an individual agent's service resource profile or from the Time Sheets or Resource Absences tabs.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

**Who:** Users with the Workforce Engagement Schedule Coordinator permission set can approve Time Sheets and Resource Absences. Users with the Workforce Engagement Agent permission set can submit Time Sheets and Resource Absences.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for Time Sheets and Resource Absences.

As an agent, open **Service Resources** from the App Launcher. Click your Service Resource profile, and click **Related**. Click **New** in either the Time Sheets or Absences related lists. Follow the steps to create a Time Sheet or Resource Absence. Saving your changes submits the Time Sheet or Resource Absence to your team lead.

As a team lead, open an agent's Service Resource profile. Click **Related**, then click to open a Time Sheet or an Absence, and change the status. Save your changes. Alternatively, open the **Time Sheets** or **Absences** tabs from the App Launcher, and see all submissions from agents there.

### Give Agents Ownership with Agent Empowerment Tools

Because happy agents make customers happy, now there are Workforce Engagement features just for agents. Retain your high performers with career development opportunities, organization enhancements, and greater ownership over their schedules.

#### IN THIS SECTION:

#### Grow Your Agents' Skills and Career Development with Agent Engagement

Empower agents to learn skills via myTrailhead and then apply these skills in forecasting, schedule planning, and shift creation. Customize myTrailhead to reflect support and product knowledge that your agents need in order to provide better service. Associate learning with skills and automatically assign those skills to agents when they complete a myTrailhead module. You can later assign agents to shifts where their skills are needed.

#### Give Agents a View of Their Work Week with Agent Home

Give agents a home base to see their schedule for the current week.

#### Improve Agents' Work-Life Balance with Service Resource Preferences

Show agents that you care about their well-being, both in and outside of work. Service Resource Preferences allow agents to specify daily operating hours that they prefer to work. These preferences are considered when a team lead assigns shifts using the Batch Assignment or Get Candidates features.

### Grow Your Agents' Skills and Career Development with Agent Engagement

Empower agents to learn skills via myTrailhead and then apply these skills in forecasting, schedule planning, and shift creation. Customize myTrailhead to reflect support and product knowledge that your agents need in order to provide better service. Associate learning with skills and automatically assign those skills to agents when they complete a myTrailhead module. You can later assign agents to shifts where their skills are needed.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license. Agent Engagement also requires a myTrailhead add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

**Who:** Users with a custom Learning Manager user profile can assign learning and users with a custom Learner user profile can take learning with Agent Engagement. Users must also have a Workforce Engagement Analyst, Workforce Engagement Schedule Coordinator, or Workforce Engagement Agent user profile.

**Why:** Agents sometimes get feedback far after an incident or at an irregular cadence. Agent Engagement allows for quick and immediate learning breaks in the normal flow of an agent's work. The feature allows agents to cross-skill, re-skill, and up-skill.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for Agent Engagement.

To assign learning as a team lead, open **Omni Supervisor** in the App Launcher. In the All Agents list, check the box next to any agent who is online, and click **Assign Learning**. Select the module you want to assign, and click **Assign Learning**.

To take a module and earn a skill as an agent, open the Omni-Channel widget, and double-click the module. Complete the module in the tab where it opens.

### Give Agents a View of Their Work Week with Agent Home

Give agents a home base to see their schedule for the current week.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

Who: Users with the Workforce Engagement Agent permission set can view their schedule in the Agent Home tab.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the configuration steps for Agent Home.

Agents open **Agent Home** from the App Launcher.

### Improve Agents' Work-Life Balance with Service Resource Preferences

Show agents that you care about their well-being, both in and outside of work. Service Resource Preferences allow agents to specify daily operating hours that they prefer to work. These preferences are considered when a team lead assigns shifts using the Batch Assignment or Get Candidates features.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

When: You can turn on Workforce Engagement in new and existing orgs after June 15, 2021.

Who: Users with the Workforce Engagement Agent permission set can submit a Service Resource Preference.

**How:** Purchase the Workforce Engagement add-on license. Enable Workforce Engagement in Setup, and select your data model preference. Follow the connfiguration steps for Service Resource Preferences.

As an agent, open **Operating Hours** in the App Launcher. Create a set of operating hours for your ideal schedule, and save your changes. Open the operating hours that you created, and click **Related**. Under Time Slots, click **New**. Create a time slot for each day of the week, specifying your preferred hours. Save your changes.

Open your service resource profile, and click **Related**. Under Preferences, click **New**. Fill in the details of your Service Resource Preference, and associate it to the operating hours that you created. Save your changes.

# Channels

Integrate your choice of supported telephony systems now that Service Cloud Voice with Partner Telephony is generally available. Build customized solutions for customers with the Voice Toolkit API and Lightning web components. Give agents a set amount of time to wrap up after a call with After Conversation Work (beta). There's an upgrade for users restricting cookies to keep their Embedded Chat conversations going. Send multimedia messages on channels that use toll-free numbers.

#### IN THIS SECTION:

#### Voice

Get the full power and potential of Service Cloud Voice by integrating it with the telephony provider of your choice. Service Cloud Voice with Partner Telephony lets you use any supported telephony provider, including Amazon Connect, with your Voice contact center. As part of this change, the Voice pages in Setup have new names to make it clear where to go. Give agents a set amount of wrap-up time after calls with After Conversation Work (ACW) (beta), and track agents' ACW time in Omni-Channel Supervisor and reports. And enjoy other new Voice features, including managed package support for the Voice Toolkit API, desk phone support (pilot), and insights into keywords uttered in calls with customers.

#### **Embedded Service for Web**

A conversation type is now required for deployments by selecting Embedded Chat, Flow, or Appointment Management for a better setup experience. Keep talking with customers who restrict their cookies and warn them to stay in their browser tab if they try to leave. Start and end chats without dropping or repeating the greetings for your customers using NVDA screen readers.

#### Messaging

User permissions are now required for agents to view previous conversation transcripts. Agents can now send customers multimedia messages on channels that use toll-free numbers.

## Voice

Get the full power and potential of Service Cloud Voice by integrating it with the telephony provider of your choice. Service Cloud Voice with Partner Telephony lets you use any supported telephony provider, including Amazon Connect, with your Voice contact center. As part of this change, the Voice pages in Setup have new names to make it clear where to go. Give agents a set amount of wrap-up time after calls with After Conversation Work (ACW) (beta), and track agents' ACW time in Omni-Channel Supervisor and reports. And enjoy other new Voice features, including managed package support for the Voice Toolkit API, desk phone support (pilot), and insights into keywords uttered in calls with customers.

## IN THIS SECTION:

## Use Your Telephony Provider with Service Cloud Voice for Partner Telephony (Generally Available)

Connect your existing telephony service with Service Cloud Voice, creating a unified and intuitive agent experience to deliver faster and more personalized service for customers. Resolve calls faster with Salesforce process automation that offers recommendations, initiates workflows, and reduces post-call handle time.

## Integrate Your Existing Amazon Connect Contact Center with Voice

If you invested in building out your Amazon Connect contact center, leverage those efforts by integrating with Service Cloud Voice with Partner Telephony. Give your agents a seamless experience and your customers top-notch service.

## Limit and Monitor After Conversation Work (Beta)

Give agents a set amount of time after a call to wrap up their work. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize call notes. Supervisors can track agents' ACW time in Omni-Channel Supervisor and reports.

#### Build Tailored Solutions for Your Customers with the Service Cloud Voice Toolkit API

Salesforce partners can provide their customers with custom solutions in all types of packages, including managed packages. The new Toolkit API is available as a Lightning web component. Previously, the Voice Toolkit API was only available as an Aura component and didn't support managed packages.

## Drill Into Call Data with Einstein Conversation Insights for Service

Give supervisors the data they need to coach agents on interactions with customers. Einstein Conversation Insights, previously known as Einstein Call Coaching, identifies key moments in customer call recordings from Sales Dialer or Service Cloud Voice. Get insight into call structure, agent talk/listen ratios, and how and when customized keywords such as product names or top customer issues are mentioned.

## Keep Your Contact Center Safe by Rotating Your Identity Provider Certificates

Salesforce uses certificates to bolster the security of your Service Cloud Voice contact centers that use Amazon Connect. If a certificate is about to expire, we let you know by email so you can replace it with a current certificate.

## Use AI to Detect Customer Intents in Real-Time Call Transcripts

Detect your customers' intents in real-time voice call transcripts and point agents to resources that can help them. Einstein Conversation Intelligence combines the seamless user experience of Service Cloud Voice with the power of Einstein Bots to trigger an event, such as refreshing the Next Best Action list, when a customer's intent is detected. For example, if a customer calls to check the warranty status of a product, automatically recommend relevant actions and flows to help the service agent address the request.

## Add User Permissions for Previous Conversation Entries

To view past voice transcriptions, authenticated users must have the Access Conversation Entries user permission. This permission is included in Salesforce standard profiles and added to the Contact Center Agent permission set. If you use a custom profile, enable the Access Conversation Entries user permission in it. Your active call transcripts aren't affected by the permission update.

## Route Calls with Flows, View Real-Time Queue Metrics, and Auto-Open Relevant Records on Calls (Pilot)

With the help of Flow Builder's power and flexibility, define your routing rules to dynamically route work to the right agent in the same place that you configure routing rules for your other channels. Give supervisors real-time queue metrics for voice calls in Omni-Channel Supervisor. And help agents provide more personalized service by automatically opening up to four relevant records in subtabs when an agent accepts a call.

#### Use Desk Phones with Service Cloud Voice (Pilot)

Use the hardphone of your choice, such as a desk phone or a mobile phone, to talk with customers.

## New Names for the Service Cloud Voice Setup Pages

The Setup pages for Service Cloud Voice with Amazon Connect were renamed to **Amazon Setup** and **Amazon Contact Centers**. We changed the names so that customers who use both Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony in the same org know which pages to use for each feature.

## New Name for the Call Controls Tab and Component

Let's call a phone a Phone.

## Service Cloud Voice Now Supported in Government Cloud

Service Cloud Voice is now available for Salesforce orgs in Government Cloud. Voice integrates intelligent telephony into Salesforce for a seamless agent experience. Agents can talk with your customers using an intuitive softphone that leverages the power of Amazon Connect, including real-time call transcription. Alternatively, you can integrate your own telephony provider into your Voice contact center to combine your existing customizations with Voice's streamlined agent and supervisor experience. Bring voice calls and your digital channels together so your agents can help customers at the right time using the channel that customers prefer.

## Use Your Telephony Provider with Service Cloud Voice for Partner Telephony (Generally Available)

Connect your existing telephony service with Service Cloud Voice, creating a unified and intuitive agent experience to deliver faster and more personalized service for customers. Resolve calls faster with Salesforce process automation that offers recommendations, initiates workflows, and reduces post-call handle time.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

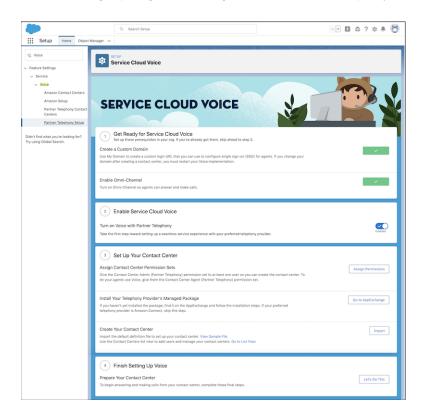
**Who:** Admins with the Contact Center Admin (Partner Telephony) permission set can set up Voice and create and manage contact centers for Service Cloud Voice with Partner Telephony. Agents with the Contact Center Agent (Partner Telephony) permission set can answer and make calls using Service Cloud Voice with Partner Telephony.

**Why:** Boost agent productivity by letting agents answer customer calls in the Service console so they can help customers on the phone without juggling multiple apps. Or, let agents use the phone of their choice—either the built-in softphone, a desktop phone, or mobile phone—with Service Cloud Voice with Partner Telephony.

Automatically open Salesforce records as subtabs when an agent accepts a call, so the agent has more context about the customer. Show real-time call transcription—available with certain telephony partners—so agents can focus on the customer instead of jotting

down notes. Show recommended actions based on the call context by integrating Voice with Einstein for Service. And monitor calls in the Omni-Channel Supervisor dashboard so managers can assist and train agents.

**How:** Ask your Salesforce account representative about which telephony partners are supported. Supported telephony partners publish a managed package on the App Exchange that integrates their system with Service Cloud Voice. Follow the steps on the setup page to install the managed package and to configure Voice with Partner Telephony.



## SEE ALSO:

Salesforce Help: Choose Your Service Cloud Voice Telephony Model (can be outdated or unavailable during release preview)
Salesforce Help: Set Up Service Cloud Voice with Partner Telephony (can be outdated or unavailable during release preview)

## Integrate Your Existing Amazon Connect Contact Center with Voice

If you invested in building out your Amazon Connect contact center, leverage those efforts by integrating with Service Cloud Voice with Partner Telephony. Give your agents a seamless experience and your customers top-notch service.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**Who:** Users with administrative access to their Amazon Web Services account and Amazon Connect instance can configure Amazon Connect. Users with administrative access to their Salesforce org can configure Service Cloud Voice.

**Why:** Agents can accept and control calls in the Omni-Channel softphone in the Service Console, reducing the number of apps to toggle and giving agents immediate access to customer data so they can provide personalized service. Real-time transcription shows the conversation as it's happening, so agents can listen and provide empathetic service instead of taking copious notes.

Launch automated workflows in Salesforce based on the real-time call transcript. Monitor calls in real time in Omni-Channel Supervisor, so managers can assist and coach agents. Check key performance indicators in the Contact Center Reporting Dashboard.

**How:** Configure Amazon Connect to integrate with Salesforce and deploy Voice-specific Lambda functions to your Connect instance. Turn on and configure Voice.

#### SEE ALSO:

Salesforce Help: Choose Your Service Cloud Voice Telephony Model (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Service Cloud Voice with Partner Telephony from Amazon Connect (can be outdated or unavailable during release preview)

## Limit and Monitor After Conversation Work (Beta)

Give agents a set amount of time after a call to wrap up their work. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize call notes. Supervisors can track agents' ACW time in Omni-Channel Supervisor and reports.

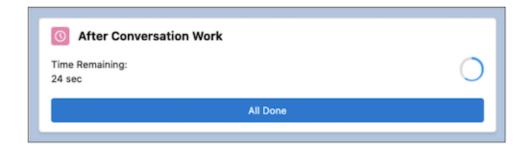
**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. After Conversation Work is available only for Voice Call channels.

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.



**Note:** After Conversation Work (ACW) is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

**How:** In your Voice Call service channel settings, select **Give agents wrap-up time after conversations**. In the Max Time (seconds) field, enter the number of seconds that agents have to wrap up their work after a conversation. The value must be between 30 and 3,600 seconds (60 minutes). Then, add the After Conversation Work component, which shows the ACW countdown, to your Voice Call record home page.



When a call's ACW time ends, the call work is considered complete whether or not the agent has closed the call record. If the agent finishes their wrap-up work before a call's ACW period runs out, they can click **All Done** or close the call record tab in the console to show that they're ready to help the next customer. Making an outbound call during the ACW period also ends the countdown.

## SEE ALSO:

Salesforce Help: Configure After Conversation Work Time (Beta) (can be outdated or unavailable during release preview)

## Build Tailored Solutions for Your Customers with the Service Cloud Voice Toolkit API

Salesforce partners can provide their customers with custom solutions in all types of packages, including managed packages. The new Toolkit API is available as a Lightning web component. Previously, the Voice Toolkit API was only available as an Aura component and didn't support managed packages.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. This change is available in all models of Service Cloud Voice.

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**Who:** Developers who want to listen to telephony and conversation events, display Next Best Action recommendations, and use Lightning Data Science can use the toolkit.

How: Add the toolkit to your Lightning web components.

SEE ALSO:

Service Cloud Voice Implementation Guide: Service Cloud Voice Toolkit API (can be outdated or unavailable during release preview)

## Drill Into Call Data with Einstein Conversation Insights for Service

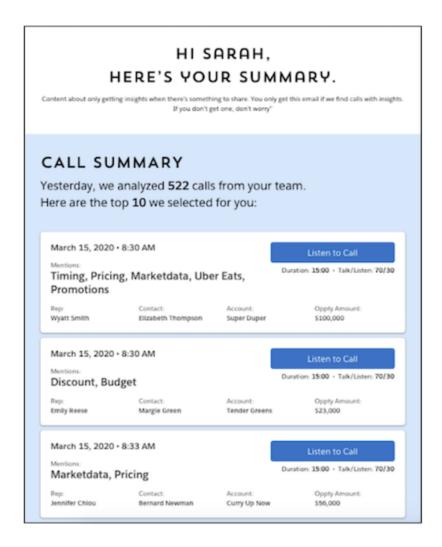
Give supervisors the data they need to coach agents on interactions with customers. Einstein Conversation Insights, previously known as Einstein Call Coaching, identifies key moments in customer call recordings from Sales Dialer or Service Cloud Voice. Get insight into call structure, agent talk/listen ratios, and how and when customized keywords such as product names or top customer issues are mentioned.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

Why: Conversation Insights gives you these resources to drive business decisions and training.

- Insight data in the audio player on call records, which provides an interactive snapshot of the keywords mentioned in the call
- Conversation Insights dashboard in the Service Console, where you can filter call data by internal rep (agent), call date, and type of mention
- Daily email summaries of the contact center's call insights



**How:** To set up Einstein Conversation Insights, go to the General Settings page under Conversation Insights in Setup. Turn on the feature, select a recording provider, and give users access. Then customize your insights, which are lists of keywords to watch for in call recordings. After you set up your insights, users with access can review call trends and receive daily insight stats.

## SEE ALSO:

Salesforce Help: Analyze Call Recordings for Insights (can be outdated or unavailable during release preview)
Salesforce Help: Compare Conversation Insights for Sales and Service (can be outdated or unavailable during release preview)

## Keep Your Contact Center Safe by Rotating Your Identity Provider Certificates

Salesforce uses certificates to bolster the security of your Service Cloud Voice contact centers that use Amazon Connect. If a certificate is about to expire, we let you know by email so you can replace it with a current certificate.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**Why:** When you create a Voice contact center with Amazon Connect, Salesforce creates a connected app that integrates Amazon Connect with Salesforce. Through SAML 2.0, the connected app and Salesforce (the identity provider) use a certificate to authenticate

users. When you're notified that a certificate in your org is expiring soon, check whether it's the one your contact center uses. If it is, provide a replacement certificate.

Although using an expired certificate with your contact center won't break anything, it's not a good security practice. Updating the certificate takes just a few minutes. The update process includes a brief period when single sign-on (SSO) is unavailable, so complete the update during a low-traffic time.

**How:** To learn how to replace a certificate, see Manage Contact Center Certificates.

## Use AI to Detect Customer Intents in Real-Time Call Transcripts

Detect your customers' intents in real-time voice call transcripts and point agents to resources that can help them. Einstein Conversation Intelligence combines the seamless user experience of Service Cloud Voice with the power of Einstein Bots to trigger an event, such as refreshing the Next Best Action list, when a customer's intent is detected. For example, if a customer calls to check the warranty status of a product, automatically recommend relevant actions and flows to help the service agent address the request.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.



Note: We provide Einstein Conversation Intelligence for Service Cloud Voice to selected customers through a pilot program that requires agreement to specific terms and conditions. Pilot programs are subject to change, and we can't guarantee acceptance. Einstein Conversation Intelligence for Service Cloud Voice 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.

**How:** To start using Conversation Intelligence, identify common customer intents, create your own bot, and use a training data set to teach the bot how those intents can arise in a conversation. Then, build your bot model and activate your bot so it can begin scanning real-time call transcripts to detect customer intents.

While some bots serve as an agent proxy in conversation with customers, customers don't interact with the Voice bot you create. Instead, your bot works quietly alongside your agents to help them resolve calls more easily.

The pilot comes with an optional starter kit of sample resources, including a bot, intent set, and flows, to help you learn your way around the feature. To learn more about this pilot, contact your Salesforce representative.

## Add User Permissions for Previous Conversation Entries

To view past voice transcriptions, authenticated users must have the Access Conversation Entries user permission. This permission is included in Salesforce standard profiles and added to the Contact Center Agent permission set. If you use a custom profile, enable the Access Conversation Entries user permission in it. Your active call transcripts aren't affected by the permission update.

**How:** From Setup, type *Profiles* in the Quick Find box. Select **Edit** by the correct user Profile Name in your list. Under Administrative Permissions, check the **Access Conversation Entries** box and **Save**.



Tip: Instead of assigning the user permission to all users with a user profile, you can assign the user permission to a permission set, and then assign the permission set to specific users or groups.

# Route Calls with Flows, View Real-Time Queue Metrics, and Auto-Open Relevant Records on Calls (Pilot)

With the help of Flow Builder's power and flexibility, define your routing rules to dynamically route work to the right agent in the same place that you configure routing rules for your other channels. Give supervisors real-time queue metrics for voice calls in Omni-Channel Supervisor. And help agents provide more personalized service by automatically opening up to four relevant records in subtabs when an agent accepts a call.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.



**Note:** Omni-Channel Flow for Voice is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. Omni-Channel Flow for Voice is made available on an AS IS basis and use of this feature is at your sole risk.

Why: The Omni-Channel Flow for Voice pilot includes the following features:

- **Dynamic flow-based routing:** Direct callers to the appropriate queue or preferred agent, creating an efficient and productive customer service experience.
- **Real-time queue metrics in Omni-Channel Supervisor:** Monitor your voice queues to better support agents and recognize potential service gaps.
- **Custom screen pops on voice calls:** To set up screen pops, build an invocable action on the Omni Flow. When an agent accepts a call, the flow's screen pop configuration determines which records automatically open as subtabs. For example, open a related contact, lead, opportunity, or any custom object.

**How:** Contact your Salesforce representative to join the Omni-Channel Flow for Voice pilot.

SEE ALSO:

Connect Your Customers to the Right Service Agents Using Omni-Channel Flow (Beta)

## Use Desk Phones with Service Cloud Voice (Pilot)

Use the hardphone of your choice, such as a desk phone or a mobile phone, to talk with customers.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. This pilot is available on orgs where Service Cloud Voice with Amazon Connect is set up.

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.



**Note:** We provide the Service Cloud Voice Desk Phone pilot to selected customers through a pilot program that requires agreement to specific terms and conditions. Pilot programs are subject to change, and we can't guarantee acceptance. Desk phone support for Service Cloud Voice 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.

Who: Agents with the Contact Center Agent permission set can set their phone type in orgs that are participating in the pilot.

**Why:** Let agents use the phone that they're most comfortable with. Previously, hardphones weren't supported on Service Cloud Voice with Amazon Connect.



**How:** Contact your Salesforce account executive to learn more about participating in this pilot.

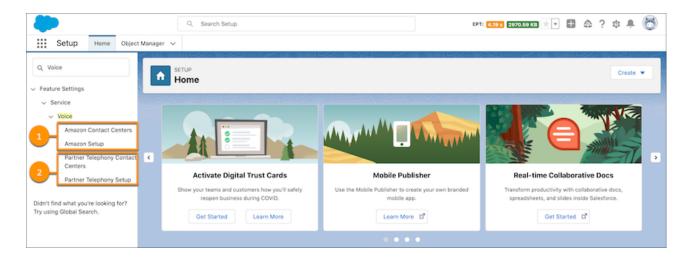
## New Names for the Service Cloud Voice Setup Pages

The Setup pages for Service Cloud Voice with Amazon Connect were renamed to **Amazon Setup** and **Amazon Contact Centers**. We changed the names so that customers who use both Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony in the same org know which pages to use for each feature.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. This change is available in all versions of Service Cloud Voice.

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

Why: The Voice Setup and Voice Contact Centers pages in the Setup menu are now Amazon Setup and Amazon Contact Centers, respectively [1]. The Service Cloud Voice with Partner Telephony Setup pages are called Partner Telephony Contact Centers and Partner Telephony Setup [2].



How: This change is automatically available.

SEE ALSO:

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

## New Name for the Call Controls Tab and Component

Let's call a phone a Phone.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

Why: The Call Controls tab in the Omni-Channel utility was renamed to Phone for better usability.



The Call Controls component was also renamed to Phone.

**How:** This improvement is automatically available to users—no setup needed.

SEE ALSO:

Salesforce Help: Answer and Make Calls in Service Cloud Voice (can be outdated or unavailable during release preview)

## Service Cloud Voice Now Supported in Government Cloud

Service Cloud Voice is now available for Salesforce orgs in Government Cloud. Voice integrates intelligent telephony into Salesforce for a seamless agent experience. Agents can talk with your customers using an intuitive softphone that leverages the power of Amazon Connect, including real-time call transcription. Alternatively, you can integrate your own telephony provider into your Voice contact center to combine your existing customizations with Voice's streamlined agent and supervisor experience. Bring voice calls and your digital channels together so your agents can help customers at the right time using the channel that customers prefer.

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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**How:** Turn on Service Cloud Voice and configure it for your org and telephony provider.

SEE ALSO:

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

## **Embedded Service for Web**

A conversation type is now required for deployments by selecting Embedded Chat, Flow, or Appointment Management for a better setup experience. Keep talking with customers who restrict their cookies and warn them to stay in their browser tab if they try to leave. Start and end chats without dropping or repeating the greetings for your customers using NVDA screen readers.

#### IN THIS SECTION:

## Add an Embedded Service Conversation Type

What's your type? New and existing Embedded Service deployments now require one conversation type—Embedded Chat, Embedded Flow, or Appointment Management. This step provides a smoother Salesforce admin setup experience and makes future improvements easier to access.

## Improve Chat Connections without Cookies

For users restricting cookie collection in their web browsers, this upgrade keeps them chatting with your agents. The change allows some chat sessions to continue without local session storage which previously ended the conversation. A warning message appears in the chat window to keep the user connected on the right web page.

## Hear the Hello on Screen Readers

Embedded Chat users with NVDA screen readers now hear your text greetings while waiting to chat. Previously, your greeting wasn't heard via a screen reader. Other messages such as End Chat were repeated, and the option to save a transcript wasn't announced. This update provides a more accessible experience starting and ending a chat.

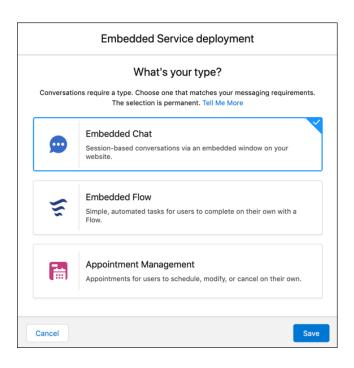
## Add an Embedded Service Conversation Type

What's your type? New and existing Embedded Service deployments now require one conversation type—Embedded Chat, Embedded Flow, or Appointment Management. This step provides a smoother Salesforce admin setup experience and makes future improvements easier to access.

**Where:** This change applies to Digital Engagement for Lightning Experience in Performance, Unlimited, and Developer editions. Permissions must be enabled to access the conversation choices.

**Why:** A deployment is where customer exchanges on your site are enabled. Choose only one conversation type to keep your website deployments distinct and working properly. The type you select is permanent, so choose carefully.

**How:** From the Embedded Service Deployment Setup node, select New Deployment and pick your conversation type. For existing deployments that aren't enabled, select View and activate the toggle. You're prompted to choose the conversation type. No action is required for deployments that are enabled on your site.



#### SEE ALSO:

Salesforce Help: Create an Embedded Service Deployment (can be outdated or unavailable during release preview)
Salesforce Help: Add a Flow to Your Website (can be outdated or unavailable during release preview)
Salesforce Help: Set Up Appointment Management (can be outdated or unavailable during release preview)

## Improve Chat Connections without Cookies

For users restricting cookie collection in their web browsers, this upgrade keeps them chatting with your agents. The change allows some chat sessions to continue without local session storage which previously ended the conversation. A warning message appears in the chat window to keep the user connected on the right web page.

Where: This change applies to Digital Engagement for Lightning Experience in Performance, Unlimited, and Developer editions.

**Why:** When a user sets more restrictive third-party cookies, including Chrome's standard Incognito mode, their conversation now works from a single web page. Chat doesn't work across new browser tabs and windows in Chrome Incognito. Firefox Enhanced Tracking set to Strict doesn't work with Chat.

**How:** If users with restrictive cookies attempt to leave the page, here's the standard warning in the chat window. Agents see a console message if the call is dropped.





#### SEE ALSO:

Salesforce Help: Embedded Chat Limitations (can be outdated or unavailable during release preview)
Salesforce Help: Embedded Chat Cookies (can be outdated or unavailable during release preview)

## Hear the Hello on Screen Readers

Embedded Chat users with NVDA screen readers now hear your text greetings while waiting to chat. Previously, your greeting wasn't heard via a screen reader. Other messages such as End Chat were repeated, and the option to save a transcript wasn't announced. This update provides a more accessible experience starting and ending a chat.

Where: This change applies to Lightning Experience for Performance, Unlimited, and Developer editions.

# Messaging

User permissions are now required for agents to view previous conversation transcripts. Agents can now send customers multimedia messages on channels that use toll-free numbers.

#### IN THIS SECTION:

## Add User Permissions for Previous Conversation Entries

To view past voice transcriptions, authenticated users must have the Access Conversation Entries user permission. This permission is included in Salesforce standard profiles and added to the Contact Center Agent permission set. If you use a custom profile, enable the Access Conversation Entries user permission in it. Your active call transcripts aren't affected by the permission update.

## Receive Images from Customers Over Toll-Free Numbers

When words aren't enough, customers can send pictures to get the help they need. Agents can also send images to customers.

## Add User Permissions for Previous Conversation Entries

To view past voice transcriptions, authenticated users must have the Access Conversation Entries user permission. This permission is included in Salesforce standard profiles and added to the Contact Center Agent permission set. If you use a custom profile, enable the Access Conversation Entries user permission in it. Your active call transcripts aren't affected by the permission update.

**How:** From Setup, type *Profiles* in the Quick Find box. Select **Edit** by the correct user Profile Name in your list. Under Administrative Permissions, check the **Access Conversation Entries** box and **Save**.



Tip: Instead of assigning the user permission to all users with a user profile, you can assign the user permission to a permission set, and then assign the permission set to specific users or groups.

## Receive Images from Customers Over Toll-Free Numbers

When words aren't enough, customers can send pictures to get the help they need. Agents can also send images to customers.

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

## SEE ALSO:

Salesforce Help: SMS Messaging Number Types (can be outdated or unavailable during release preview)

# Routing

Efficiently route work to the most qualified agents with Omni-Channel Flow (beta). Status-based and tab-based capacity limits both changed to 100.

#### IN THIS SECTION:

Connect Your Customers to the Right Service Agents Using Omni-Channel Flow (Beta)

Manage complex routing processes from a centralized location to create efficient, flexible and productive service experiences.

## Improve Planning and Performance with New Omni-Channel Capacity Limits

New capacity limits improve performance and planning flexibility. The status-based capacity limit increased to a maximum of 100 simultaneous work items per agent. Increasing status-based capacity facilitates long-term planning for high-volume support teams. The tab-based capacity limit permits agents a maximum of 100 tabs at once, which improves system performance and avoids agents owning near infinite numbers of work items.

## Streamline After Conversation Work (Beta)

Give agents a set amount of time following a customer conversation to wrap up their work before moving on to help the next customer. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize notes. Supervisors can track agents' ACW time with Omni-Channel Supervisor and reports.

## Connect Your Customers to the Right Service Agents Using Omni-Channel Flow (Beta)

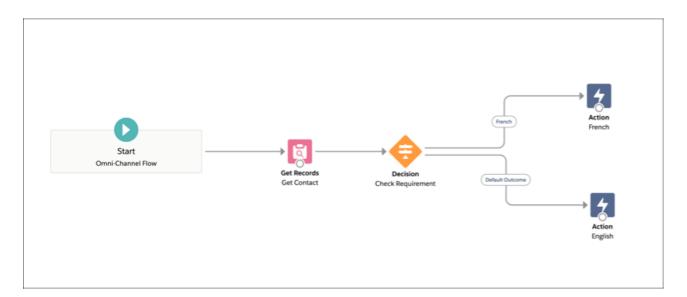
Manage complex routing processes from a centralized location to create efficient, flexible and productive service experiences.

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



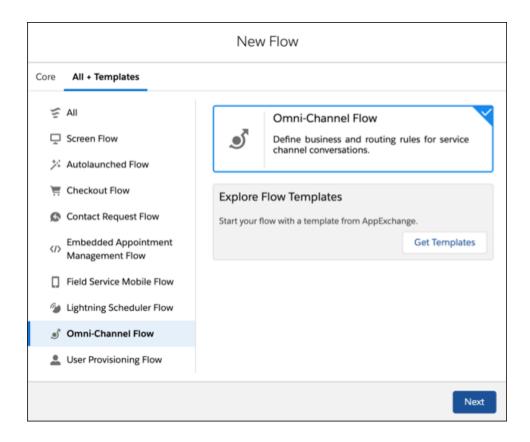
**Note:** As a beta feature, Omni-Channel Flow is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce 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 Omni-Channel Flow in the Trailblazer Community.

**Why:** The Omni-Channel Flow incorporates all the functionality of Omni-Channel within a Salesforce Flow. Use the power and flexibility of Flow Builder to define your routing rules and other business processes and dynamically route work to the best agent for each customer.



For example, use the information on the Chat Transcript or a related Contact to route work based on the website your customer is using, their location or language, the number of times they reached out for help, or even their preferred agent.

**How:** If it's your first time using an Omni-Channel Flow, enable it in Omni-Channel Settings.



After you enable Omni-Channel Flow, search Flows in the Quick Start menu, then select Omni-Channel Flows.

SEE ALSO:

Route Calls with Flows, View Real-Time Queue Metrics, and Auto-Open Relevant Records on Calls (Pilot)

# Improve Planning and Performance with New Omni-Channel Capacity Limits

New capacity limits improve performance and planning flexibility. The status-based capacity limit increased to a maximum of 100 simultaneous work items per agent. Increasing status-based capacity facilitates long-term planning for high-volume support teams. The tab-based capacity limit permits agents a maximum of 100 tabs at once, which improves system performance and avoids agents owning near infinite numbers of work items.

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

# Streamline After Conversation Work (Beta)

Give agents a set amount of time following a customer conversation to wrap up their work before moving on to help the next customer. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize notes. Supervisors can track agents' ACW time with Omni-Channel Supervisor and reports.

**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, Sales, and Government Clouds. After Conversation Work is available only for Voice Call channels.



Note: After Conversation Work (ACW) is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

## **Einstein for Service**

We're always on the lookout for ways that Einstein can make you and your agents more productive. Einstein Case Wrap-Up, now generally available, predicts case field values when agents finish customer chats. And we notify you when Einstein Reply Recommendations refreshes reply templates so you can publish new and updated replies for agents to use.

#### IN THIS SECTION:

#### Einstein Classification

We're expanding and improving Einstein classification tools. To help your agents close cases quickly and consistently, Einstein Case Wrap-Up, now generally available, suggests final field values at the end of a chat. Like Einstein Case Classification, which predicts field values on incoming cases, it saves agents time so that they can focus on your customers. To make it easier to create predictive models, we updated the setup process, added custom condition filters, and notify you about build progress.

#### Einstein Article Recommendations

To show agents relevant articles on cases, we set up article recommendations in a few Salesforce orgs that have Knowledge.

## Einstein Reply Recommendations

Learn when Einstein refreshes replies, search through them, and show replies in the customer's language.

## SEE ALSO:

Einstein Release Notes

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#### IN THIS SECTION:

#### Close Cases Fast with Einstein Case Wrap-Up (Generally Available)

During a chat, your agents can learn valuable information about a case. When the chat ends, agents can get Einstein's recommendations for case field values. Einstein suggests field values based on language patterns in your closed cases and chat transcripts.

## Create Classification Models with Ease

We consolidated the setup process for Einstein Case Classification so that it's easy to create classification models for Einstein Case Wrap-Up too. We guide you through the steps so that Einstein's predictions can make your agents more productive.

## Boost Prediction Quality with Custom Condition Filters

When you create predictive models, send Einstein a precise set of closed cases to learn from. Define a custom condition filter with AND and OR Boolean operators, such as (1 AND 2) OR 3. Previously, you could filter cases that met all specified conditions or none of them.

## Stay on Top of Einstein's Build Progress

Follow Einstein's progress in building your predictive model. As Einstein completes learning for each field, we notify you. Previously, to learn if Einstein had a problem analyzing fields in your closed-case data, it was on you to check Setup.

## Complete Calls with Ease via Einstein Voice Call Wrap-Up (Pilot)

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

## Close Cases Fast with Einstein Case Wrap-Up (Generally Available)

During a chat, your agents can learn valuable information about a case. When the chat ends, agents can get Einstein's recommendations for case field values. Einstein suggests field values based on language patterns in your closed cases and chat transcripts.

Where: This change applies to Lightning Experience in:

- Performance and Unlimited editions
- Enterprise Edition with the Digital Engagement SKU

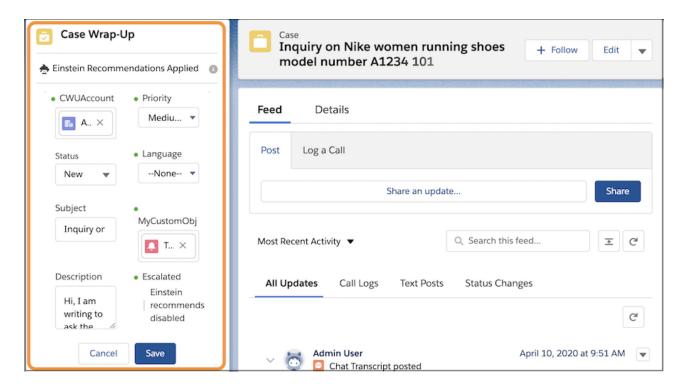
**Who:** With the Try Einstein version, you can create a single model. To customize up to five models for different parts of your business, you need the Service Einstein license.

**Why:** Like Einstein Case Classification, Einstein Case Wrap-Up suggests values on case fields based on activity on past cases. But Einstein Case Wrap-Up learns from closed cases and chat transcripts to unlock key customer service data.

**How:** Make sure that Chat is set up in your org. While you can start using Case Wrap-Up without chat transcripts, you need at least 400 closed cases from the past 6 months that include a subject or description. When you start with closed cases that include chats, Einstein's recommendations are more accurate. But don't worry—Einstein keeps learning over time as your agents close cases with chats.

To create a model, from Setup, in the Quick Find box, enter *Einstein Classification*, and then select **Einstein Classification**. Specify Case Wrap-Up as the classification app, and select which fields you want Einstein to predict.

To see Einstein's predictions, agents click **Get Einstein Recommendations** in the Einstein Field Recommendations Lightning component. We also refresh recommendations when a chat ends. A green dot marks fields with predictions. Agents can review and select field values from Einstein's recommendations.



SEE ALSO:

Salesforce Help: Einstein Classification Apps (can be outdated or unavailable during release preview)

## Create Classification Models with Ease

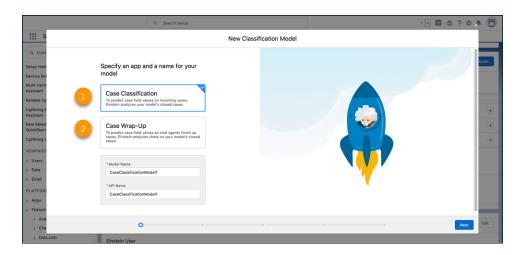
We consolidated the setup process for Einstein Case Classification so that it's easy to create classification models for Einstein Case Wrap-Up too. We guide you through the steps so that Einstein's predictions can make your agents more productive.

Where: This change applies to Setup in Lightning Experience.

- For Einstein Case Classification, in Enterprise, Performance, and Unlimited editions
- For Einstein Case Wrap-Up, in Performance and Unlimited editions. Also in Enterprise edition with Digital Engagement add-on SKU.

**Who:** With the Try Einstein version, you can create a single model for each app. To customize up to five models per app for different parts of your business, you need the Service Einstein license.

**How:** From Setup, in the Quick Find box, enter *Einstein Classification*, and then select **Einstein Classification**. Previously, you entered *Einstein Case Classification*. When you create a model, select the app and choose the fields that you want Einstein to learn from. Einstein Case Classification (1) recommends values on incoming cases. Einstein Case Wrap-Up (2) helps chat agents complete case fields when a chat ends.



SEE ALSO:

Salesforce Help: Einstein Classification Apps (can be outdated or unavailable during release preview)

## **Boost Prediction Quality with Custom Condition Filters**

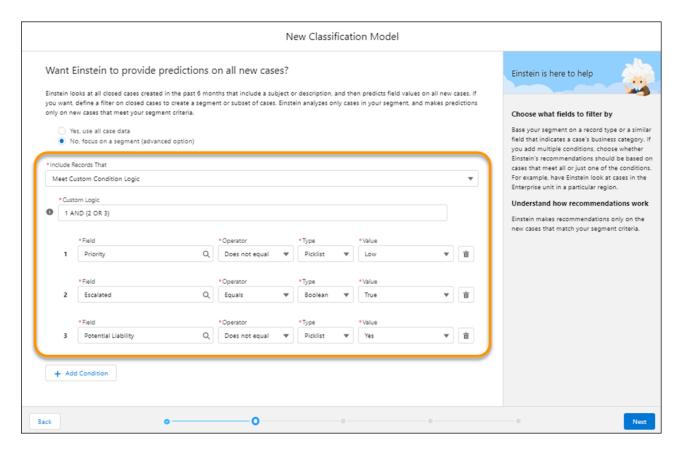
When you create predictive models, send Einstein a precise set of closed cases to learn from. Define a custom condition filter with AND and OR Boolean operators, such as (1 AND 2) OR 3. Previously, you could filter cases that met all specified conditions or none of them.

Where: This change applies to Setup in Lightning Experience.

- For Einstein Case Classification, in Enterprise, Performance, and Unlimited editions
- For Einstein Case Wrap-Up, in Performance and Unlimited editions. Also in Enterprise Edition with Digital Engagement add-on SKU.

**Who:** With the Try Einstein version, you can create a single model. To customize up to five models for different parts of your business, you need the Service Einstein license.

**How:** When you define a segment or example filter, select the option to include cases that **Meet Custom Condition Logic**. Then specify a conditional expression with the AND and OR Boolean logical operators.



## Stay on Top of Einstein's Build Progress

Follow Einstein's progress in building your predictive model. As Einstein completes learning for each field, we notify you. Previously, to learn if Einstein had a problem analyzing fields in your closed-case data, it was on you to check Setup.

Where: This change applies to Setup in Lightning Experience.

- For Einstein Case Classification, in Enterprise, Performance, and Unlimited editions
- For Einstein Case Wrap-Up, in Performance and Unlimited editions. Also in Enterprise edition with Digital Engagement add-on SKU.

**Who:** We send in-app and email notifications to the Salesforce admin who created the model. With the Try Einstein version, you can create a single model for each app. To customize up to five models per app for different parts of your business, you need the Service Einstein license.

**How:** By default, notifications are active. If you want to turn off in-app notifications, from Setup, enter *Notification Delivery Settings*, and then select **Notification Delivery Settings**.

SEE ALSO:

Salesforce Help: Build Your Classification Model (can be outdated or unavailable during release preview)
Salesforce Help: Manage Notification Delivery Settings (can be outdated or unavailable during release preview)

## Complete Calls with Ease via Einstein Voice Call Wrap-Up (Pilot)

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

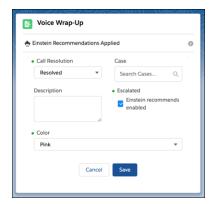
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions, and it requires Service Cloud Voice.



Note: We provide Einstein Voice Call Wrap-Up 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. Einstein Voice Call Wrap-Up 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 Einstein Voice Call Wrap-Up in IdeaExchange in the Trailblazer Community.

**Why:** Like Einstein Case Classification and Einstein Case Wrap-Up, 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.

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. To view predictions, agents click **Get Einstein Recommendations**, and we refresh recommendations when the call ends. A green dot indicates which fields have predictions. Agents can then review and save recommended updates.



**How:** 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.

## **Einstein Article Recommendations**

To show agents relevant articles on cases, we set up article recommendations in a few Salesforce orgs that have Knowledge.

## IN THIS SECTION:

## Save Time with Out-of-the-Box Einstein Article Recommendations

In certain orgs with Knowledge, we turn on article recommendations for you and supply a generic model that uses default field and language settings. Your agents then see article recommendations right away. When your business uses specific case and knowledge fields, you can improve recommendations if you customize the model and Einstein learns from your org's closed-case data.

## Save Time with Out-of-the-Box Einstein Article Recommendations

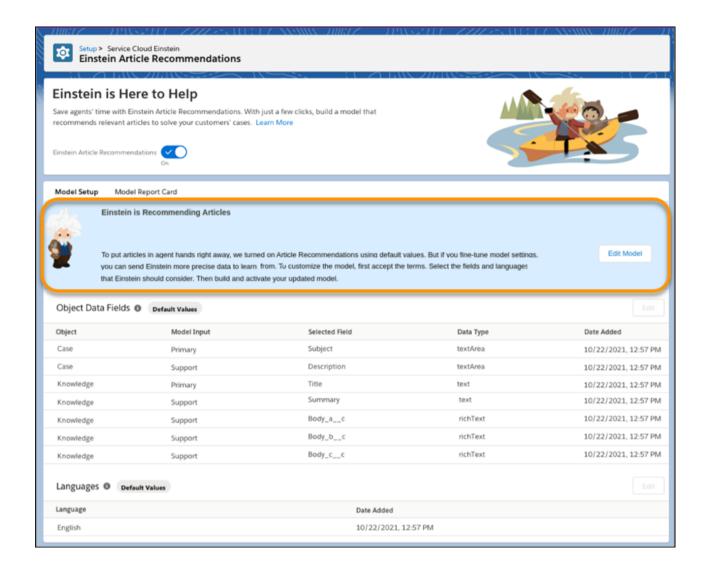
In certain orgs with Knowledge, we turn on article recommendations for you and supply a generic model that uses default field and language settings. Your agents then see article recommendations right away. When your business uses specific case and knowledge fields, you can improve recommendations if you customize the model and Einstein learns from your org's closed-case data.

**Where:** This change applies to Lightning Experience in certain orgs with Enterprise, Performance, and Unlimited editions that have Service Cloud and Lightning Knowledge.

**Who:** Over several releases, we're phasing in article recommendations as active in orgs with Knowledge. If it's active in your org, by default, all Lightning Knowledge users see recommended articles in the Knowledge component. If you want, you can show Einstein's recommendations to specific users.

**How:** To see if Einstein is configured to recommend articles, from Setup, in the Quick Find box, enter *Einstein Article Recommendations*. If we set it up for you, we specified default fields and languages, and supplied a pre-trained model. If your business uses other fields, your agents can see more accurate recommendations when you accept the terms in Setup, select the right fields, and update the model to use your data. Build your model, and then activate it.

If you're not ready to use article recommendations and it's active, in Setup, you can turn it off.



#### SEE ALSO:

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

# Einstein Reply Recommendations

Learn when Einstein refreshes replies, search through them, and show replies in the customer's language.

## IN THIS SECTION:

## Discover New Replies to Put in Your Agents' Hands

Learn when Einstein refreshes your replies so that you can publish them for chat agents to use. If you create a predictive model with 1,000 chat transcripts, Einstein performs a one-time refresh of reply templates when there are 10,000 transcripts to analyze. When we update the model, we send in-app notifications and emails. You know right away when the refresh occurs or if there was a problem.

## Find Replies Fast

Search the reply templates that Einstein generates, and locate replies of interest. After you review and publish replies, Einstein can recommend them to your chat agents.

## Show Your Chat Agents Replies in 16 Languages (Pilot)

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

## Discover New Replies to Put in Your Agents' Hands

Learn when Einstein refreshes your replies so that you can publish them for chat agents to use. If you create a predictive model with 1,000 chat transcripts, Einstein performs a one-time refresh of reply templates when there are 10,000 transcripts to analyze. When we update the model, we send in-app notifications and emails. You know right away when the refresh occurs or if there was a problem.

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

**Who:** Einstein notifies active Salesforce admins and content managers who have the user permission Manage Replies for Einstein Reply Recommendations.

**How:** By default, notifications are active. If you want to turn off in-app notifications, from Setup, enter *Notification Delivery Settings*, and then select **Notification Delivery Settings**.

#### SEE ALSO:

Salesforce Help: Publish Replies for Einstein to Recommend (can be outdated or unavailable during release preview)
Salesforce Help: Manage Notification Delivery Settings (can be outdated or unavailable during release preview)

## Find Replies Fast

Search the reply templates that Einstein generates, and locate replies of interest. After you review and publish replies, Einstein can recommend them to your chat agents.

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

## Show Your Chat Agents Replies in 16 Languages (Pilot)

Give your chat and messaging agents responses that reflect where you do business. When you have most of your closed chat transcripts in one or more supported non-English languages, Einstein can recommend replies in those languages. 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.



**Note:** We provide multiple language support for Einstein Reply Recommendations 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. Multiple language support for Einstein Reply Recommendations 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 multiple language support for Einstein Reply Recommendations in IdeaExchange in the Trailblazer Community.

**How:** Recommended replies are based on past chat transcripts and come from a list generated by Einstein and approved by you. For Einstein to recommend replies in a supported non-English language, you need 1,000 closed chats in that language. If you have 10,000 chats in a non-English language, that's even better. If 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.

To sign up for this pilot, contact your Salesforce Account Executive.

# Case Management

Updates to the Case Email quick action let you send longer emails, use Bulk Macros, and now offer full compatibility with right to left language keyboards. Generate a custom help center to let customers do more for themselves. Or streamline agent workflows with prebuilt case productivity enhancements like Lightning template compatibility with Web-to-Case, Support Settings, and Case Assignment Rules.

#### IN THIS SECTION:

## Send Multiple Emails with Unique Templates in a Single Macro

Bulk Macros now support Classic and Lightning Experience email templates. Use more complex macros to automatically handle repetitive emails. Your templates can now have inline images, letterhead, and merge fields to help you craft the perfect email subject and body.

## Track Case Email Alerts with Threading in the Case Feed

Case Email alerts now support email threading for processes you design in process builder, workflow, or with an entitlement process. Customer response emails show up in the feed together, to make it easier to track what stage of correspondence a case is in.

## Increase Security with Guest User Email Improvements

Security updates to guest user private sharing let admins further adjust Experience Cloud guest user permissions, restricting guests from viewing Email Messages. Now, guest users can create email records, but can't access or modify others without the proper create, read, and write permissions on the parent case or activity record for the guest user profile.

## Generate a Custom Help Center to Guide Customers to Solutions

Use the Service Setup Assistant to make a customizable help center web page that removes steps from the customer issue to resolution pipeline. The help center functions as a customer support form that lets guests create their own case, or they can use it to find relevant knowledge articles and avoid creating a case altogether.

## Preconfigure Lightning Templates in Case Support Settings, Web-to-Case, and Case Auto-Response Rules

Lightning templates are compatible with Support Settings when auto-assigned through Service Setup Assistant, which means agents now have instant access to three powerful tools. Automate the Case Creation and Edit functions, instantly create and send a Customer Satisfaction Survey or Net Promoter Score, and let Salesforce handle notification emails to help boost agent productivity when a case owner changes.

## Send Longer Emails with the Case Email Quick Action

Send more meaningful emails with a Case quick action starting Summer '21. The max sendable email size is 384,000 characters, up from 131,000 characters, so sent emails now have a longer character limit than your max email body limit.

## Use a Default No-Reply Address as System Address for Case Email Notifications (Previously Released Update)

From Setup, configure a default No-Reply address from the Organization-Wide Addresses page. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update is scheduled for auto-activation (enforcement) in Spring '22.

#### Send Case Emails with Right to Left Language Compatibility

Case Email quick actions now support right-to-left language syntax. Two new buttons let your agents switch between left-to-right and right to left alignment within the email body text editor.

## Disable Ref ID and Transition to New Email Threading Behavior (Update, Postponed)

A new enforcement deadline for Disable Ref ID and Transition to New Email Threading Behavior gives admins until Summer '22 to adopt mandatory email threading changes through the Release Update feature. A previous postponement announced that it was scheduled for auto-activation (enforcement) in Winter '22.

## Send Multiple Emails with Unique Templates in a Single Macro

Bulk Macros now support Classic and Lightning Experience email templates. Use more complex macros to automatically handle repetitive emails. Your templates can now have inline images, letterhead, and merge fields to help you craft the perfect email subject and body.

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

**How:** Run a Bulk Macro from the Case List View or Record Home page and choose an email template.

SEE ALSO:

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

## Track Case Email Alerts with Threading in the Case Feed

Case Email alerts now support email threading for processes you design in process builder, workflow, or with an entitlement process. Customer response emails show up in the feed together, to make it easier to track what stage of correspondence a case is in.

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

**How:** Turn on the new email threading behavior, then use process builder to automate a case action and trigger email alerts. Now, when an email alert is associated with the case object and the case action is complete, the system automatically sends an email alert according to the corresponding email template. Only inbound replies to your email alert are saved in the database, so email alert threading doesn't require any additional storage space to send out email alerts. Make sure that your email client always includes references and in-reply to information in the header.

# Increase Security with Guest User Email Improvements

Security updates to guest user private sharing let admins further adjust Experience Cloud guest user permissions, restricting guests from viewing Email Messages. Now, guest users can create email records, but can't access or modify others without the proper create, read, and write permissions on the parent case or activity record for the guest user profile.

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

**How:** Experience Cloud guest users can only create EmailMessage records if they have Create permission on the Case or Enhanced Email (orgHasEnhancedEmail or Activities.canAccessActivities) objects. With the appropriate permissions, guest users can create a single email message or multiple email messages via a case, contact, or account.

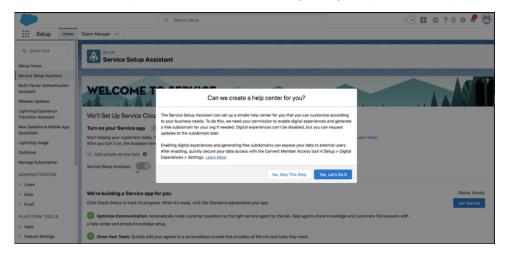
Guest users without access to the Case or Activity objects can no longer create records by referring to EmailMessage records in any objects. Guests can no longer access any EmailMessage records directly, even if they were initially created by a guest user.

# Generate a Custom Help Center to Guide Customers to Solutions

Use the Service Setup Assistant to make a customizable help center web page that removes steps from the customer issue to resolution pipeline. The help center functions as a customer support form that lets guests create their own case, or they can use it to find relevant knowledge articles and avoid creating a case altogether.

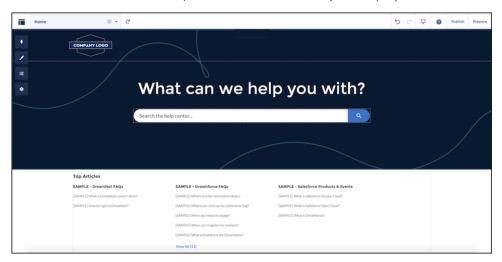
**Where:** This change applies to Lightning Experience in Professional, Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**How:** Turn on and set up the Service Setup Assistant, then go to Digital Experiences in Setup.

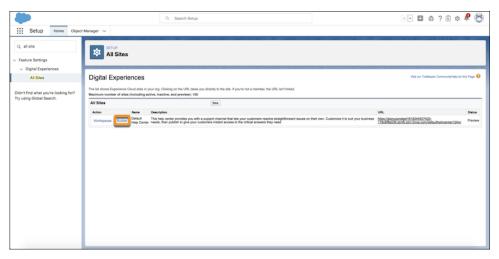


Admins that don't have a help domain or don't have Digital Experiences turned on must give Salesforce consent to create a help center on their behalf. To move on, click **Yes, let's do it!** 

The sample experience starts in Preview mode with generic branding and a sample team, and guest users can't create cases by default. Admins must adjust their guest user permission settings during customization before guests can use the help center. See our help for details on how to customize the help site's look and feel to match your company's ethos.



Admins choose what gets exposed when guests interact with the **What can we help you with?** search bar in their API settings, but it shows only sample articles by default.



The help center isn't published until you click **Builder** in Feature Settings, as publishing makes the site live and viewable to anyone with the link. Activate the button through the **Administration** link, then go back to the builder and click publish that appears in the top-right corner.

# Preconfigure Lightning Templates in Case Support Settings, Web-to-Case, and Case Auto-Response Rules

Lightning templates are compatible with Support Settings when auto-assigned through Service Setup Assistant, which means agents now have instant access to three powerful tools. Automate the Case Creation and Edit functions, instantly create and send a Customer Satisfaction Survey or Net Promoter Score, and let Salesforce handle notification emails to help boost agent productivity when a case owner changes.

**Who:** To use Lightning templates in Cases Support Settings, admin users need a Service license and Create permission. Guest users also need permission to use a Customized Application. From the Support Settings page, after the necessary licenses and permissions are assigned, make sure the Notify Case Owner of New Case Comments, Enable Email Drafts (must enable Email-to-Case first), and Show Email Attachments in Case Attachments Related Lists user preferences are all turned on.

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

**How:** From Setup, in the Quick Find box, enter *Support Settings*, and then select **Support Settings**. Specify the style of your template as Lightning. Select the Case Creation, Case Assigned, or Survey templates, then save your new assignment.

When the Survey preference is turned on, the system creates a Customer Satisfaction Survey and a Net Promoter Score, and assigns the Customer Satisfaction Survey by default. Salesforce doesn't create Customer Feedback Surveys until you turn on the Survey preference in the Service Support Settings from the Setup page.

When you turn on the Case Creation template, you can automate the Case Creation and Edit functions. After you configure Case Assigned Template, Salesforce sends out notification emails when a case's owner changes. If there is no active Case Auto-Response Rule, Salesforce creates a sample one and assigns it a Lightning Email-to-Case template.

## SEE ALSO:

Salesforce Help: Customize Support Settings (can be outdated or unavailable during release preview)
Service Setup Assistant(can be outdated or unavailable during release preview)

## Send Longer Emails with the Case Email Quick Action

Send more meaningful emails with a Case quick action starting Summer '21. The max sendable email size is 384,000 characters, up from 131,000 characters, so sent emails now have a longer character limit than your max email body limit.

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

**How:** If you have a custom email body limit, the maximum size of a savable email is still 131,000 characters. This change doesn't affect the default size limit of 32,000 characters and only applies to the Case Email quick action. Content that exceeds the email body limit is automatically truncated before saving sent emails.

# Use a Default No-Reply Address as System Address for Case Email Notifications (Previously Released Update)

From Setup, configure a default No-Reply address from the Organization-Wide Addresses page. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update is scheduled for auto-activation (enforcement) in Spring '22.

**When:** This update is scheduled for enforcement 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.

**Why:** To avoid posing security risks, existing orgs don't have HTML and custom email components if they aren't set up properly through the Use a Default No-Reply Address as System Address for Case Email Notifications release update. If you turn on Send Case Notifications from System Address from the Support Settings setup page, after you click **Enable Test Run** in the Release Update, email notifications for inbound emails for existing Cases, case comment, case escalation, and case assignment send from your selected default No-Reply address.



Note: Read all the steps outlined in the release update before you select **Enable Test Run**.

Previously, with Send Case Notifications from System Address on, email notifications for Case Comment and Case Assignment were automatically sent from noreply@salesforce.com. Now, agents can respond or process those emails directly from their admin's chosen default No-Reply address.

Before, email notifications were sent from the Automated Case User only for Case Escalation and when an existing case receives emails -- independent of the Send Case Notifications from System Address preference. Now, if you select Send Case Notifications from System Address preference, these notifications are sent from the default No-Reply address.

**How:** To enable this update, first configure a default No-Reply address. Otherwise, when you turn on Send Case Notifications from System Address, email notifications for incoming emails on existing cases, Case Comment, Case Escalation, and Case Assignment send from noreply@salesforce.com. The notifications lack important information, and eventually stop sending.

Finally, configure a default No-Reply address, Verify your default No-Reply address, Set Up Case Escalation and Inbound Email for Existing Cases, and Enable Test Run and Run Tests to test and activate the release update.

# Send Case Emails with Right to Left Language Compatibility

Case Email quick actions now support right-to-left language syntax. Two new buttons let your agents switch between left-to-right and right to left alignment within the email body text editor.

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

**How:** Click between the two new buttons in the Case Email toolbar to switch the selected line of text to the other side of the text editor. The new buttons only control which margin the text originates from when a left-to-right keyboard is selected, so the characters still populate from left-to-right in the sentence.

## Disable Ref ID and Transition to New Email Threading Behavior (Update, Postponed)

A new enforcement deadline for Disable Ref ID and Transition to New Email Threading Behavior gives admins until Summer '22 to adopt mandatory email threading changes through the Release Update feature. A previous postponement announced that it was scheduled for auto-activation (enforcement) in Winter '22.

**When:** 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 new Email-to-Case Threading behavior, incoming emails aren't matched using Ref ID from the subject or body. Instead, they're matched using standard Email headers. Now, email headers match to their corresponding cases and new outbound emails don't contain a Ref ID.

**How:** Email-to-Case is backward compatible until you turn on the new threading method, or after this update is auto-enforced. If you turn off the update, incoming responses without Ref ID don't link to an existing case and a new one is created.

Before you turn on Email-to-Case threading, verify that there's data in the Message-ID, In-Reply-To, and References fields. It's crucial that getCaseIdFromEmailThreadId wherever it occurs in your org's custom code.

SEE ALSO:

Disabled Ref Id and New Threading Behavior for Email-To-Case

# Knowledge

Let the Service Setup Assistant complete key Knowledge setup steps for you. Enjoy more space to create or update articles with the expanded size of the CKEditor, which also supports right-to-left languages. Help your agents quickly find articles that are most relevant to them with Einstein Article Recommendations. Try out Einstein Search for Knowledge (pilot).

## IN THIS SECTION:

#### Let the Service Setup Assistant Kick Off Your Knowledge Journey

The Service Setup Assistant now completes key Knowledge setup steps for you.

## Put Articles in Your Agents' Hands with Einstein Article Recommendations

In some orgs with Knowledge, we set up Einstein Article Recommendations for you so that your agents can save time and find the most relevant articles in a flash. Instead of scrolling through long lists, agents simply select the right articles from Einstein's recommendations to attach to cases and send to customers. Over several releases, we're phasing it in as active in orgs with Knowledge.

## Expand Your Editorial Space on Articles for Easier Updates

The CKEditor on Lightning Knowledge articles now automatically grows up to 750 pixels in height to give you more space for creating or updating content. This update gives you a lot more space for working on articles, whether they're in a standard page, console page, console subtab, window, or inline edit.

## Support Right-to-Left Languages in the CKEditor on Articles

The CKEditor on Lightning Knowledge articles now supports right-to-left languages, such as Arabic, Hebrew, and Urdu.

## Find Articles Using Knowledge Advanced Search with Einstein Search

Knowledge Advanced Search, now available with Einstein Search, lets your users prefilter search criteria to find knowledge articles with the most relevant information for their task. When your users select Knowledge from the global search box dropdown list, they immediately get access to the Advanced Search screen. From there they can add filters before entering search terms, then run the search.

## Compare Versions of an Article to See What Changed (Generally Available)

Knowledge users can compare two versions of an article to review changes. The Article Version Comparison app component lets authors choose a version to see the differences. This feature, which is now generally available, includes some changes since the beta release.

## Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)

Salesforce Knowledge for Lightning Experience got a boost with Al. Now you can shorten the time it takes your service agents and customers to find knowledge articles that are most relevant to them. Try it by signing up for the Einstein Search for Knowledge pilot.

## Let the Service Setup Assistant Kick Off Your Knowledge Journey

The Service Setup Assistant now completes key Knowledge setup steps for you.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience with Lightning Knowledge enabled. Service Setup Assistant is available in Salesforce orgs with the Setup app.

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

If this is your first time using the Service Setup Assistant, toggle it on and click **Get Started**. If you've already run the Assistant, click **Get the Update** to get the new features.

The Assistant completes a number of service setup tasks for you. Here are the Knowledge features it provides. It doesn't overwrite any of your existing configurations.

- An optimized record page for knowledge articles that includes a compact layout, Article Tools and Feed tabs, Details fields, and a Compare Versions component
- A New Article global action that makes it easier for agents to create articles
- Prebuilt Channel Mapping configurations that give your team article-specific responses to use when inserting articles into emails, chats, and other channels

For a full list of the tasks that the Service Setup Assistant completes for you, see Run and Update the Service Setup Assistant.

# Put Articles in Your Agents' Hands with Einstein Article Recommendations

In some orgs with Knowledge, we set up Einstein Article Recommendations for you so that your agents can save time and find the most relevant articles in a flash. Instead of scrolling through long lists, agents simply select the right articles from Einstein's recommendations to attach to cases and send to customers. Over several releases, we're phasing it in as active in orgs with Knowledge.

**Where:** This change applies to Lightning Experience in certain orgs with Enterprise, Performance, and Unlimited editions that have Service Cloud and Lightning Knowledge.

SEE ALSO:

Save Time with Out-of-the-Box Einstein Article Recommendations

## Expand Your Editorial Space on Articles for Easier Updates

The CKEditor on Lightning Knowledge articles now automatically grows up to 750 pixels in height to give you more space for creating or updating content. This update gives you a lot more space for working on articles, whether they're in a standard page, console page, console subtab, window, or inline edit.

**Where:** This change applies to Essentials, Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience with Lightning Knowledge enabled.

**Who:** To edit an article, you must be a Knowledge user, have the Manage Article user permission, and have Read and Edit permissions for the article.

How: Edit any article with the CKEditor.

#### SEE ALSO:

Salesforce Help: Work with Articles and Translations (can be outdated or unavailable during release preview)
Salesforce Help: Rich Text Fields in Knowledge Articles (can be outdated or unavailable during release preview)
IdeaExchange: Lightning Rich Text Editor Needs Option to Expand or Pop Out

## Support Right-to-Left Languages in the CKEditor on Articles

The CKEditor on Lightning Knowledge articles now supports right-to-left languages, such as Arabic, Hebrew, and Urdu.

**Where:** This change applies to Essentials, Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience with Lightning Knowledge enabled.

**Who:** To edit an article with right-to-left languages, you must be a Knowledge user, have the Manage Article user permission, and have Read and Edit permissions for the article.

**How:** From the rich text toolbar on an article, select the button to enter text from a right-to-left language.



## SEE ALSO:

Salesforce Help: Right-to-Left (RTL) Language Support (can be outdated or unavailable during release preview)
Salesforce Help: Rich Text Fields in Knowledge Articles (can be outdated or unavailable during release preview)

# Find Articles Using Knowledge Advanced Search with Einstein Search

Knowledge Advanced Search, now available with Einstein Search, lets your users prefilter search criteria to find knowledge articles with the most relevant information for their task. When your users select Knowledge from the global search box dropdown list, they immediately get access to the Advanced Search screen. From there they can add filters before entering search terms, then run the search.

**Where:** This change applies Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

SEE ALSO:

Use Knowledge Advanced Search with Einstein Search

## Compare Versions of an Article to See What Changed (Generally Available)

Knowledge users can compare two versions of an article to review changes. The Article Version Comparison app component lets authors choose a version to see the differences. This feature, which is now generally available, includes some changes since the beta release.

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

**Why:** Your authors and editors can more easily review changes and track progress across versions with the Article Version Comparison component. Your users choose a version to compare against the currently viewed version.



**How:** In the Lightning Page builder, drag the Article Version Comparison component onto your Knowledge layout. We recommend creating a tab in your layout for this tool so it's available for your team when they need it. Comparing articles isn't supported in Microsoft IE11 or the Microsoft Edge browser.

SEE ALSO:

Salesforce Release Notes: Compare Versions of an Article to See What Changed (Beta)

## Let Einstein Search for Knowledge Improve How Users Find Answers (Pilot)

Salesforce Knowledge for Lightning Experience got a boost with Al. Now you can shorten the time it takes your service agents and customers to find knowledge articles that are most relevant to them. Try it by signing up for the Einstein Search for Knowledge pilot.



**Note:** This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk. You can provide feedback and suggestions for Einstein Search for Knowledge at TryEinsteinSearch@salesforce.com.

**Where:** This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

**Why:** Your customers and agents can get answers to their questions even when they don't know exactly what they're looking for. For example, when searching in the Knowledge sidebar for a customer case, the most useful knowledge articles are highlighted with a Promoted label.

# 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:

#### Salesforce CDP

Salesforce CDP 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

With Customer 360 Identity, provide customer protection with secure Embedded Login redirects and verification of email address updates.

## Customer 360 Privacy Center

Satisfy data privacy law with Right to Be Forgotten policies that delete customer data. Create as many policies as necessary to meet different types of customer requests.

# Salesforce CDP

Salesforce CDP is a customer data management, segmentation, and activation tool that drives personalization and engagement. Using a series of solutions, you can achieve a single, actionable view of your customer built on the world's #1 customer platform.

Check out the latest features and updates from in the Salesforce CDP Release Notes.

# 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.

Check out the latest features and updates from Customer 360 Data Manager: Customer 360 Data Manager Release Notes.

# **Customer 360 Identity**

With Customer 360 Identity, provide customer protection with secure Embedded Login redirects and verification of email address updates.

For details about these release updates, see Identity and Access Management on page 581.

# **Customer 360 Privacy Center**

Satisfy data privacy law with Right to Be Forgotten policies that delete customer data. Create as many policies as necessary to meet different types of customer requests.

#### IN THIS SECTION:

## Delete Customer Data with Right to Be Forgotten Policies

Create unique policies for customer Right to Be Forgotten requests that capture data at the object level. Then apply a policy to delete the records when you receive a customer request. Choose to add the request to an automatic 24-hour cycle, or manually execute the request at any time.

# Delete Customer Data with Right to Be Forgotten Policies

Create unique policies for customer Right to Be Forgotten requests that capture data at the object level. Then apply a policy to delete the records when you receive a customer request. Choose to add the request to an automatic 24-hour cycle, or manually execute the request at any time.

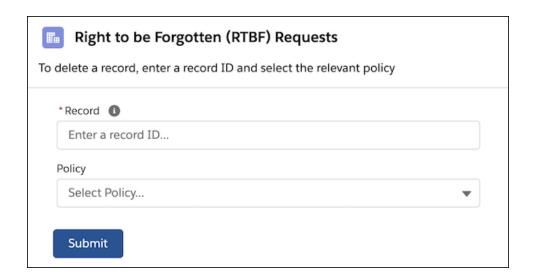
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: To use this feature in the Customer 360 Privacy Center, you need the ModifyAllData and PrivacyCenter permissions.

**How:** From Setup, in the Quick Find box, enter *Customer 360 Privacy Center*. Under Right to Be Forgotten Policies click **View All**. To create a policy, click **New** next to Right to Be Forgotten (RTBF) Policies. Follow the instructions to add and save objects to your policy, then activate your policy.



To execute a request, under Right to Be Forgotten (RTBF) Requests, enter a Record ID and select the policy you want to apply. Submit the request to add it to a 24-hour queue. To execute the request immediately, under RTBF Requests, click the name of your request, then click **Run Now**.



SEE ALSO:

Salesforce Help: Delete Data with Right to Be Forgotten Policies(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

# Other Salesforce Products and Services

# **Customer Success Group**

The certified experts, consultants, and innovative tools of Salesforce Customer Success Group are here to help with support, best practices, and professional services at every stage of your journey. With each release, we introduce new and better ways to help you see results from all your Salesforce products, faster. Highlights for this release include:

- Assurance Services, now available for Industries
- Run Readiness, a new offer under our Assurance Services category to help guide you at a critical step in your implementation journey
- Help Portal Enhancements, including a total redesign of Salesforce Help
- Guidance Center Enhancements, which empower admins of all orgs and experience levels to effectively use Salesforce and enable their teams

## Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the Heroku Changelog.

## Trailhead GO

Trailhead GO empowers anyone to skill up for free anytime, anywhere.

You can access all of the amazing Trailhead learning content that you love—including the more than 1,000 badges of marketable skills, trailmixes, and Trailhead LIVE—from the palm of your hand.

And now you can collaborate with Trailblazers, ask questions, and share knowledge on important topics with Community in Trailhead GO.

Trailhead GO is available on iPhone, iPad, and Android devices.

- Android: Trailhead GO at Google Play
- iOS: Trailhead GO at the App Store

# Spotlight on Content

We updated a Trailhead module, created an instructional video, and moved Single Sign-On (SSO) content. While you're checking those out, take a moment to learn about our Industries Cloud Common Developer resources.

## 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.

## Get the Most Out of Industries Cloud Common Developer Resources

Industry clouds are versions of Salesforce specially designed for specific market segments. For example, Financial Services Cloud helps insurance and mortgage providers connect with customers, and Health Cloud helps doctors' offices, hospitals or insurance providers engage patients. There's a cloud for emergency management, a cloud for retail sales, and more. Some of these Industries clouds have components, such as objects, invocable actions, APIs, and events, that can be useful for two or more clouds. We've built a central place where you can learn about these multi-purpose components and how to put them to work for your organization.

#### Access the Latest Single Sign-On (SSO) Content in Salesforce Help

To improve your Salesforce experience, we moved content from the Single Sign-On Implementation Guide to **Identify Your Users and Manage Access** in Salesforce Help. Check out **Single Sign-On** in Help for the most up-to-date SSO content, including steps for configuring SAML SSO across multiple orgs or Experience Cloud sites.

# **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's what's new.

## Modules

## **Workforce Engagement for Contact Center Planning**

Learn how support operations planners use data to schedule and staff agents.

#### **Service Cloud Voice**

We updated the module to include information about choosing your own telephony partner.

#### **Collaborative Forecasts Setup**

We updated the steps and hands-on challenge for creating a forecast type so you can practice using the new setup flow.

## **Security Center**

Get a single view of security and governance metrics for all your orgs.

## **Trails**

## **Explore Advanced Security Features**

Strengthen your security posture with features that enable consistent, accurate policy application and auditing.

# Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new Make Every Conversation Count with Salesforce Meetings video shows how to enhance sales reps' interactions using
  the Meeting Digest to prepare for meetings and the Meeting Studio to engage attendees like never before.
- The new Welcome to Email Template Builder video shows how to easily create beautiful email templates with Email Template Builder and Email Content Builder.

# Get the Most Out of Industries Cloud Common Developer Resources

Industry clouds are versions of Salesforce specially designed for specific market segments. For example, Financial Services Cloud helps insurance and mortgage providers connect with customers, and Health Cloud helps doctors' offices, hospitals or insurance providers engage patients. There's a cloud for emergency management, a cloud for retail sales, and more. Some of these Industries clouds have components, such as objects, invocable actions, APIs, and events, that can be useful for two or more clouds. We've built a central place where you can learn about these multi-purpose components and how to put them to work for your organization.

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

How: Head over to the Industries Common Resources Developer Guide on Salesforce Developers.

SEE ALSO:

**Extend Your Cloud with Shared Industries Features** 

# Access the Latest Single Sign-On (SSO) Content in Salesforce Help

To improve your Salesforce experience, we moved content from the Single Sign-On Implementation Guide to **Identify Your Users and Manage Access** in Salesforce Help. Check out **Single Sign-On** in Help for the most up-to-date SSO content, including steps for configuring SAML SSO across multiple orgs or Experience Cloud sites.

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

SEE ALSO:

Configure SAML SSO Between Salesforce Orgs or Experience Cloud Sites

# Release Updates

Release Updates continue to provide important information about org changes and have fully replaced critical updates.

## IN THIS SECTION:

#### Critical Updates Node Was Removed

The Critical Updates node in Setup no longer exists. In the previous release, Setup contained a link to the Release Updates node.

## Release Update Announcements

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

# Critical Updates Node Was Removed

The Critical Updates node in Setup no longer exists. In the previous release, Setup contained a link to the Release Updates node.

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

# Release Update Announcements

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but they can affect your existing customizations. Find the Summer '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 so that you can evaluate its impact on your org.

# **Enforced Updates**

These updates were announced in a previous release and are now enforced.

## Disable Access to Non-global Apex Controller Methods in Managed Packages (Update, Enforced)

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, Enforced)

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.

#### Convert the Read Only Standard Profile to a Custom Profile (Update, Enforced)

This update converts the Read Only standard profile to a custom profile, which allows you to edit permissions in this profile as your business needs require. This update was first available in Spring '21 and is enforced in Summer '21.

## Require Verification When Experience Cloud Users, Partners, and Customers Change Their Email Address (Update, Enforced)

To protect user accounts against security threats, Salesforce now requires Experience Cloud users, partners, and customers to verify their email address changes. This update, first available in Winter '21, was scheduled for auto-enforcement in Spring '21, but was postponed to and is enforced in Summer '21.

## Enforce Data Access in Flow Merge Fields (Update, Enforced)

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.

# **Previously Released Updates**

These updates were announced in a previous release and are still available.

## **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 org ID. 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.

## **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.

## Securely Call the Visualforce Remoting API (Previously Released 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.

## Use a Default No-Reply Address as System Address for Case Email Notifications (Previously Released Update)

From Setup, configure a default No-Reply address from the Organization-Wide Addresses page. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update is scheduled for auto-activation (enforcement) in Spring '22.

## 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.

## Accurately Measure the CPU Time Consumption of Flows and Processes (Previously Released 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 (Previously Released 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.

## 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 Summer '21.

## Update Guest User's Email Address (Update)

When you create an Experience Cloud or Salesforce site, Salesforce automatically creates a guest site user. In any site created before the Summer '21 release, the email address for the site guest user record was that of the Salesforce user who created the site. After the Summer '21 release, the system generates a dummy email address to use in the guest site user record.

## **Enable Enhanced Domains (Update)**

To comply with the latest browser and security standards, enable enhanced domains on your Salesforce org's My Domain. With enhanced domains, your company-specific My Domain name is included in your URLs, including Salesforce Sites and Experience Cloud sites. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Salesforce enhanced domains also comply with the latest browser requirements, allowing your users to access Salesforce using browsers that block third-party cookies. Because this update affects application URLs, including Experience Cloud sites, Salesforce Sites, and Visualforce pages, we recommend that you enable enhanced domains before it's enforced in Summer '22.

#### **Delete Your Original Territory Management Sharing Records (Update)**

This update deletes your original territory management sharing records to prevent issues in Enterprise Territory Management.

Previously you contacted Salesforce Customer Support or used Metadata API to delete original territory management sharing records.

This update lets you delete them on the Release Updates page in Setup.

## **Securely Access Aura Components (Update)**

This update ensures that an external component with access="public" is accessible only to other components within its same namespace or to internal Salesforce components. This update is enforced in Winter '22.

## **Enforce OAuth Scope for Lightning Apps (Update)**

This update enforces the scope of an OAuth token used to authenticate a Lightning app. Previously, the scope wasn't enforced for Lightning apps. The scope of an OAuth token is defined in a connected app. This change prevents a Lightning app from using OAuth tokens with unintended permissions. This update is scheduled for enforcement in Winter '22.

# Postponed Updates

These updates are postponed.

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

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

## **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.

#### Disable Ref ID and Transition to New Email Threading Behavior (Update, Postponed)

A new enforcement deadline for Disable Ref ID and Transition to New Email Threading Behavior gives admins until Summer '22 to adopt mandatory email threading changes through the Release Update feature. A previous postponement announced that it was scheduled for auto-activation (enforcement) in Winter '22.

## 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.

## 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.

## Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This update was released in Summer '19 and scheduled for enforcement in Summer '20 but was then postponed to Winter '21 and again to Winter '22. The update is again postponed to Summer '23. 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.

# **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.