

Salesforce Release Notes

Salesforce, Winter '22

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



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SALESFORCE WINTER '22 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 Winter '22 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](#)

Winter '22 brings a flurry of new features and improvements. Enjoy smarter searching with Einstein Search, available by default and at no extra charge. View and manage permission set licenses more efficiently. Use the Your Account app to view, pay, and download invoices for your Salesforce subscriptions. Check out the many exciting improvements to User Engagement, Salesforce Surveys, and Salesforce Scheduler. And remember, on February 1, 2022, all your internal users who log in to Salesforce through the user interface must use Multi-Factor Authentication.

[Analytics](#)

Get unified sales and service data with a new Customer Insights app, make your modeling more accurate with improved validations, and find insights faster with a redesigned search experience.

[Commerce](#)

Commerce Cloud enhancements include new and updated features for B2B Commerce on Lightning Experience, B2B2C Commerce, Salesforce Order Management, and Omnichannel Inventory.

[Customization](#)

Create more dynamic and performant Lightning pages with Dynamic Interactions and improvements to Performance Analysis for App Builder. Choose from a larger selection of publicly available APIs thanks to added support for larger spec sizes and expanded limits for operations, actions, and objects. Support your users wherever they work with new time zones, languages, and locales.

[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 Search is turned on by default in Lightning Experience, so everyone can benefit from AI-powered search at no extra cost. Use your own external models in Einstein Discovery for even better predictions. Einstein Key Accounts Identification ranks your best accounts to help you optimize your account-based marketing efforts. Launch one Einstein Bot in many languages, helping to reduce administrative workload and providing more choices for interaction. Read up on these features and more, and get ready to work smarter with all that Einstein has to offer.

Einstein Automate

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (beta). 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

Use our new Microsite template, which is based on the Lightning Web Runtime (LWR), to capture user data and create leads without the overhead of developing a complete website. Archive sites that outlived their usefulness and free up space to create the sites you need. Optimize your site performance with several content delivery network (CDN) enhancements. And build LWR sites more quickly with several new drag-and-drop components.

Field Service

Let customers efficiently set and manage their appointments without calls with Self-Service Scheduling for Appointment Assistant. Save time and money by giving your customers technical support without going on-site with Visual Remote Assistant. Prevent costly maintenance missteps by creating criteria-based asset maintenance plans. Enhanced features in shift patterns and templates help you streamline resource planning and scheduling. And with custom actions, make Work Plans work better for your business.

Industries

Industries solutions for business verticals keep getting smarter and easier to use. Consumer Goods Cloud helps manage store visits and monitor stock better. Financial Services Cloud adds deal management and branch management. Health Cloud introduces automated benefit verification and user-friendly appointments. Manufacturing Cloud brings enhanced forecasting and SKU management. Public Sector Cloud makes licensing and permitting simpler and faster. Industries products that you can use in more than one Industries cloud, such as the data processing engine and decision tables, get significant enhancements.

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 the new full-width tablet app experience on iPad and Android tablets. Briefcase Builder helps make offline record data available to your users. Mobile Publisher offers users new distribution methods to best fit your org's needs.

myTrailhead

Enhance your myTrailhead learning experience with new options for fulfilling your company's unique training and enablement requirements.

Pardot

Getting started with Pardot is easier than ever with the new setup assistant in Marketing Setup. You also get automation extensibility and landing page builder enhancements, Engagement Studio support for drag-and-drop builder emails, and Einstein Key Accounts Identification on list views. The key accounts feature and mailability changes are generally available.

Revenue

In Salesforce CPQ, a release update adds permissions to standard permission sets and updates Access permission sets. Salesforce Billing prevents duplicate payments by locking invoices until confirming a valid response from the payment gateway. Credit note lines now inherit the Tax Percentage field, revenue finance books support more finance periods, and a Customer Asset Lifecycle Management field was relabeled.

Sales

Pipeline Inspection lets you create custom filters, watch important opportunities, and see which deals are less likely to close in the current month. Show a Most Likely forecast category on the forecasts page. Assign territories quicker and put assignment rules on pause. Add Inbox users to any Einstein Activity Capture configuration. Salesforce Maps helps you automate assignments for large territories. Territory Planning gives you flexibility to design territories for in-person and virtual customer visits. High Velocity Sales lets you update active sales cadences and test different versions of email templates and call scripts on the same outreach step.

Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Quip. Let your users choose where they work, stay in Quip with documents that autofill with Salesforce data and records created from Salesforce live apps, or work in Salesforce with the Template Library in Lightning Experience. Speed up your Quip setup with the New Document global quick action automatically added to all your global publisher layouts. Learn about the latest updates to Salesforce Anywhere Beta features.

Salesforce CDP

The latest round of Salesforce CDP updates directly addresses customer feedback and unlocks access to new data sources, such as Commerce Cloud. Look out for a more accessible experience for mapping data and major improvements in Identity Resolution. There's also a new Salesforce Web SDK to unify website instrumentation across Salesforce CDP and Interaction Studio.

Salesforce CMS

Preview your content before you publish to make sure things are just right.

Security, Identity, and Privacy

To comply with browser requirements, you must have a My Domain, or we deploy one for you. Verify your identity with biometric built-in authenticators. To help you prepare for the multi-factor authentication (MFA) requirement, use the MFA Rollout Pack. Enjoy a more intuitive consent data model and Portability Policy dashboards. Event Monitoring includes four new event log file types and more detailed Transaction Security policy notification emails. Encrypt more Financial Services Cloud data at rest. Find sensitive data across your org with the new Einstein Data Detect managed package (generally available). And Threat Detection integration with Security Center is now generally available, along with customizable alerts for monitoring security configuration changes.

Service

Take advantage of a wide range of new, intuitive Service Cloud features that help you and your team deliver efficient, flexible service. Try out Incident Management, which allows your team to diagnose root causes and resolve major incidents faster while creating a better customer experience. Use it to empower your service teams to quickly classify and prioritize work, assign the right experts, and streamline communication with customers. Workforce Engagement offers a queue-based workflow for planning and staffing tools so you can access the business analytics that you need faster. And set up Service Cloud Voice with Partner Telephony more easily with the new prescriptive setup experience, which includes templates and menus to help you create your contact center and sync it with your telephony provider.

Slack Apps

Use Slack and Salesforce together to connect with customers, track progress, collaborate seamlessly, and deliver team success from anywhere.

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

Get the latest information on features from Customer Success Group, Heroku, IdeaExchange, and Trailhead GO.

[Spotlight on Content](#)

Learn how to prepare for the multi-factor authentication (MFA) requirement, get help migrating to Einstein Activity Capture, discover resources with the Email and Calendar Integrations learning map, and much more! We also added Trailhead modules and trails, and instructional videos.

[Release Updates](#)

Salesforce periodically provides release updates that improve the performance, logic, security, and usability of our products. The Release Updates page provides a list of updates that can be necessary for your organization to enable. Some release updates affect existing customizations.


[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 that 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 [Salesforce Known Issues](#).

 **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

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

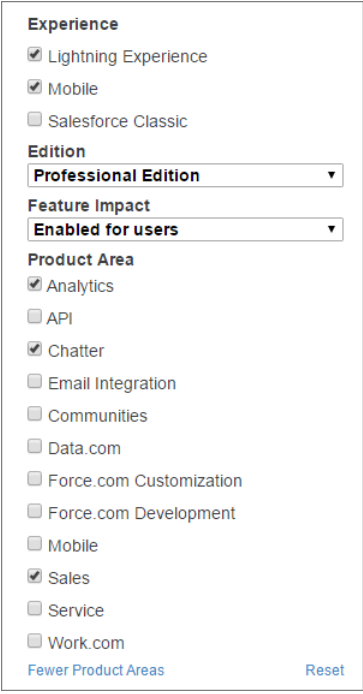
Feature Impact

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.



The screenshot shows a filter sidebar with the following sections:

- Experience**
 - ☒ Lightning Experience
 - ☒ Mobile
 - ☐ Salesforce Classic
- Edition**
 - Professional Edition (dropdown menu)
- Feature Impact**
 - Enabled for users (dropdown menu)
- Product Area**
 - ☒ Analytics
 - ☐ API
 - ☒ Chatter
 - ☐ Email Integration
 - ☐ Communities
 - ☐ Data.com
 - ☐ Force.com Customization
 - ☐ Force.com Development
 - ☐ Mobile
 - ☒ Sales
 - ☐ Service
 - ☐ Work.com

At the bottom of the sidebar are two links: [Fewer Product Areas](#) and [Reset](#).

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."

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
Customization	
Separate Contract Sharing Rules	Control Access to Sensitive Data with Restriction Rules (Generally Available) (partially delivered)
Criteria Based Sharing rules: Allow Lookup/formula/dynamic values and user field	
Support for fully private (no read or write) activity sharing model.	
Criteria Based Field Level Security	
Experience Cloud	
Screenshot in Chatter (<i>partially delivered</i>)	Paste Images in Chatter Posts and Comments
Pardot	
Allow emails, not just email templates in an engagement program	Push Emails from Lightning Experience into Engagement Programs
Enable The New Email Builder For All Emails In Pardot	
Allow Pardot Lightning Email templates to be available for use in ES programs	
Use the Lightning Email builder with Engagement Studio's in Pardot	
WYSIWYG for landing page	Build Landing Pages Faster with Drag-And-Drop Editor
Einstein Account Scoring	Explore Einstein Key Accounts on List Views (Generally Available)
Create Pardot List via the API and specify the folder	Pardot API: New and Changed Items
Add created_at and updated_at to the Campaigns API response	
Pardot setup wizard	Set Up and Configure Pardot More Easily
Export/import function for Activities in Pardot	Take Your Automations Further with Pardot Extensibility Enhancements (<i>partially delivered</i>)
Connector with GoToMeeting	
Run automation rules on EventBrite actions	
Allow Custom Prospect Activities	
Pardot to Wistia: Filter Specific Video Conversions in Lists & Automation	
Allow automation rule for Olark engaged chat prospects	
Wistia automation	

IdeaExchange**Idea delivered**

Integration between Olark Offline Message Feature and Pardot

Add Connector for Vimeo

Skype for Business and Pardot integration

Associate Visitor Data with Eventbrite Registrations

Allow 'rejected' registration status for automation rules

Set up Zoom integration for webinars

Pardot: Allow API to Write to Prospect Activity Records for Custom Video Player

Release Note Changes

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

December 13, 2021

Edit and Save Trailmixes with Confidence

Added a release note about user experience changes when you edit a trailmix in a myTrailhead subdomain.

Other Changes to Flow Screen Components

Added information about the changed size and placement of info bubbles for Long Text Area components.

Metadata API

Added a release note about the new SchedulingRule metadata type.

Replacing the EHR Data Model with the Clinical Data Model

Updated the timeline from Summer '22 to Winter '23.

Connect to a SIFM-Enabled myTrailhead Subdomain in Slack

Added a release note about connecting the Trailhead app in Slack to a myTrailhead subdomain that uses Salesforce Identity for myTrailhead (SIFM) authentication.

Connect to a SIFM-Enabled myTrailhead Subdomain on Mobile Devices

Added a release note about connecting the Trailhead GO app for mobile devices to a myTrailhead subdomain that uses Salesforce Identity for myTrailhead (SIFM) authentication.

Broaden Your myTrailhead Content to More International Audiences

Added a release note to announce that myTrailhead subdomains now support Korean and Chinese (Simplified) as language options.

Removed: Get Information About the Current Site in Lightning Web Components

Removed release note.

December 6, 2021

Sort Upcoming & Overdue Activities Intuitively

Corrected the name of the default setting.

Get Relationship Recommendations from Multiple Sources

Updated the release note as we're now able to show relationship recommendations from Slack.

Metadata API

Announced the documentation of a new field on the OrderManagementSettings metadata type.

November 29, 2021**Self-Schedule Appointments from Anywhere**

Revised release note to reflect a known issue with guest users.

Enable ICU Locale Formats (Release Update)

Enforcement of this release update is postponed to Spring '23. Guidance for enabling the locale formats is expanded in the linked documentation.

Enable Enhanced Domains (Release Update)

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

Rebuild the Search Index up to 60 Times per Hour in B2B Commerce Search

Added a release note to highlight the search index rebuild limit for B2B Commerce storefronts and orgs.

Rebuild the Search Index up to 60 Times per Hour in B2B2C Commerce Search

Added a release note to highlight the search index rebuild limit for B2B2C Commerce storefronts and orgs.

Customers Can View About 5,000 Results per Search Request in B2B Commerce Search

Added a release note to highlight the search results limit for B2B Commerce storefronts.

Customers Can View About 5,000 Results per Search Request in B2B2C Commerce Search

Added a release note to highlight the search results limit for B2B2C Commerce storefronts.

Search Indexes Deleted After 60 Days of Inactivity for B2B Commerce Search

Added a release note to highlight removal of inactive search indexes to conserve resources.

Search Indexes Deleted After 60 Days of Inactivity for B2B2C Commerce Search

Added a release note to highlight removal of inactive search indexes to conserve resources.

Metadata API

The `enableAuraDepAccessChksCRUCPref` and `enableSplitViewOnStandard` fields on the `LightningExperienceSettings` metadata type are removed because the features are no longer available.

Removed: Users Directed to Previous Page or Object Home After Deleting a Record

Removed release note.

WDC (Legacy Work.com) Is Being Retired

Added a release note announcing the retirement of WDC.

https://help.salesforce.com/s/articleView?id=release-notes.rn_pardot_external_activity.htm

Added a needed user permission for the first user to access this feature.

Removed: Populate Salesforce Data Automatically in a Document Created from a Template in Quip

Removed release note.

Removed: Streamline Template Creation with New Settings

Removed release note.

November 15, 2021**Self-Schedule Appointments from Anywhere**

Added a release note announcing that patients can schedule their own appointments with Health Cloud.

Trailblazer.me Supports New Languages

Added a release note announcing that Trailblazer.me supports 11 more languages.

Respect Customer Privacy with Auto-Paused Call Transcription

Added a release note announcing that Service Cloud Voice now supports pausing call transcriptions.

Get the Latest Version of Tableau CRM for iOS and Android

Added information about the latest release of Tableau CRM for mobile users.

Filter Pardot Automations with Einstein Account Tier Field

Added a release note announcing the addition of Einstein Key Accounts Identification tier field to Pardot automation tools.

Use Mock Responses to Test Salesforce Functions

Updated content to explain why it's necessary to mock the invocation of Salesforce Functions by Apex test methods.

Consumer Goods Cloud Offline Mobile App

Added information about the new Consumer Goods Cloud Offline Mobile App.

Other Changes to Flow Screen Components

Added information about screen flow run-time errors for custom Aura components. This topic was previously called "Other Changes to Salesforce-Provided Flow Screen Components."

Metadata API on page 271

Announced the documentation of several new fields on the BotMessage, BotQuickReplyOption, BotStep, and BotVariableOperation subtypes of the BotVersion metadata type.

Prevent Data Loss with Backup and Restore (Generally Available)

Added a release note about the Backup & Restore feature.

November 8, 2021

Help Einstein Search Find the Right Results for Different Users (Beta)

Updated the release note to more clearly explain the feature.

Learn How Einstein Search Uses Your Data

Added a release note to highlight a new Einstein Search Help topic.

Use Simple Model to Easily Explore Relationships

Added a release note to highlight Simple Model as the default way to explore relationships.

Get Relationship Recommendations from Multiple Sources

Updated the release note as we're unable to show relationship recommendations from Slack at the moment. This feature isn't ready for showtime, so we're removing it for now while we make improvements. We'll let you know after it's back up.

Login Credentials Using URL Query Strings Are Disabled (Release Update)

Clarified that this change is enforced as a release update in Spring '22. Previously, the release note implied that the change took effect in Winter '22.

Metadata API on page 271

Updated the release note to include the ConversationDefinitionChannelProvider subtype of the Bot metadata type and the EmbeddedMessaging value in the messageType field on the ConversationContextVariableMapping subtype of the Bot metadata type.

Hard Delete Records in Privacy Center

Added a release note for hard deleting records in Privacy Center.

November 1, 2021

Metadata API

Added a description of the new `enableBuiltInAuthenticator` field on the `SessionSettings` subtype of the `SecuritySettings` metadata type.

Metadata API

Updated the description for the new `identifier` field on the `ComponentInstance` and `FieldInstance` subtypes on the `FlexiPage` metadata type to indicate that it's a required field.

Enable Encrypted Customer IDs for Payeezy ACH Payment Methods

Added information about a new payment method field for Payeezy payment gateway users.

New Requirements for Payeezy ACH Payment Methods

Added information about new field requirements for Payeezy ACH payment methods.

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

Corrected the release note for when this release update is enforced.

October 25, 2021

Create Custom Property Editors That Use Literal Values for Complex Data Inputs

Added a release note about the new support for complex literal values in flow custom property editor components.

New and Changed Connect in Apex Classes

Added information about the new `evaluateRecordsetFilterCriteria(recordsetFilterCriteriaInput)` method in the `ConnectApi.FieldService` class.

Send Notifications When Updating Lead Owners via APEX

Added a release note about the new `Notify New Lead Owner When Updated` via APEX setting in Leads Setup.

Track the Success of Your myTrailhead Content

Added a release note about collecting and viewing user ratings for published modules on your myTrailhead subdomain.

Replacing the EHR Data Model with the Clinical Data Model

Added a release note about replacing the EHR data model with the Clinical data model in Health Cloud.

Metadata API

Added a release note about the new `urlPathPrefix` field on the existing `ExperienceBundle` metadata type.

Metadata API

Added a release note about the addition of the `MeetingsSettings` metadata type to the *Metadata API Developer Guide*.

Popularize Data-Driven Decision-Making with Ask Data for Salesforce (Beta) on page 156

Changed the status of the feature from pilot to beta.

October 18, 2021

Access to Pipeline Inspection Includes a System User, Profile, and Package

Added a release note with details about the Sales Insights Integration User, Integration Insights profile, and the Sales Insights package.

Get More from Your Knowledge Base with Article Answers Improvements (Beta)

Added section to the Article Answers release note announcing the ability to add multiple questions to a knowledge article.

Metadata API

Added information about the removal of the `enableSetPasswordInApi` field from the `PasswordPolicies` subtype of the `SecuritySettings` metadata type in API version 52.0.

Unleash the Power of Elastic Compute with Salesforce Functions (Generally Available)

Clarified that Salesforce Functions is now generally available and requires its own license.

Updates to Inactive Sandbox Expiration Process on page 230

Inactive sandboxes now expire after 179 days.

Access Omnichannel Inventory Headless APIs with Your Salesforce Credentials

Added a release note announcing that users can access Omnichannel Inventory headless APIs with their Salesforce credentials.

October 11, 2021

Use Intelligent Form Reader in Regions Compliant for Data Residency

Added a release note announcing that Intelligent Form Reader is now compliant for Data Residency in Australia and Canada.

New and Changed Invocable Actions in High Velocity Sales

Added topic about new High Velocity Sales invocable actions.

Manage High Velocity Sales Cadence Targets in Your Flows

Added topic about new High Velocity Sales invocable actions.

Get the Enhanced Salesforce Anywhere Experience

Added a release note about access to Quip Lightning components when admins are logged in as other users.

Add Rows and Columns in Email Content Builder Email Templates, Spread Out in Email Content Builder Email Templates with Column Padding, Indent Text in Rich Text Components in Email Content Builder Email Templates, and Navigate More Easily in Email Content Builder Email Templates with Breadcrumbs

Added release notes about updates to the Email Template Builder that are also available in the Email Content Builder in Pardot.

Give Buyers a Complete View of Their Account's Order History

Added a release note about updates to the Order List component for Commerce.

Enforce OAuth Scope for Lightning Apps (Release Update)

Corrected path to the Session Type column.

New and Changed Objects

Added new picklist values to the `Type` field of the `LiveChatTranscriptEvent` object.

Reference Aggregation Results with Ease

Added a release note about Data Prep recipe aggregation pivot group name changes for Tableau CRM.

Multi-Select Picklist Screen Component Values No Longer Include an Extra Space

Added a release note announcing that the displayed values of Multi-Select Picklist screen components no longer include an extra space when more than one value is selected at run time.

October 5, 2021

Health Cloud

Removed reference to self-service appointments.

October 4, 2021

Digital Process Automation

Added release note about Digital Process Automation (DPA) workflow automation and orchestration.

Enforce OAuth Scope for Lightning Apps (Release Update)

Added details for connected apps installed from a package. Also, added a tip about using the Metadata API to review a large number of connected apps.

Analytics Mobile Apps

Added release notes about accessing data when you're offline (now generally available), and the latest version of Tableau CRM for iOS and Android.

Sort Upcoming & Overdue Activities Intuitively

Updated the content to correctly explain the two sort order options for the activity timeline. Updated the first screenshot to reflect the new UI text.

Monitor Your AMP Promotion Performance in the AppExchange Marketplace Analytics Dashboard

Added a release note announcing changes to the Marketplace Analytics dashboard that help you gauge the performance of AppExchange Marketing Program (AMP) promotions.

Get Reliable Insights from Unbalanced Data (Pilot)

Added "(Pilot)" designation to Einstein Discovery data rebalancing feature.

Upgrade to Identity Connect 7.1.1

Added information about installing the Identity Connect 3.0.1.2 security update.

Login Credentials Using URL Query Strings Are Disabled (Release Update)

Clarified that login credentials are disabled in all URL query strings. Previously, the release note stated that login credentials were disabled only in GET query strings.

Add Tables to Emails

Added a release note about the new table action in the email composer.

September 27, 2021

Spotlight on Content

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

Plan for Pardot Drip Program Retirement

Added information on feature removal for customers not currently using it.

Upgrade to Identity Connect 7.1.1

Updated Identity Connect version to 7.1.1.

Match Phone Service Numbers in 15 Locales

Added numbers for 15 emergency and service locale now detected by Einstein NER (beta).

New Permissions for Creating Contracts and Service Contracts

Added information on new permissions required to create contracts and service contracts.

Secure Your Components Better, Stronger, Faster with Lightning Web Security (Beta)

Updated Session Settings image and clarified features descriptions.

Give Your Users Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Beta)

Added information on how admins can enable this feature in Setup for beta customers.

Platform Events Maximum Batch Size Is 200

Added a release note about the new maximum batch size for platform events.

Convert Multivalue Fields to String Fields in SAQL (Generally Available)

Added release note for the generally available version of SAQL's `mv_to_string()` function, which no longer requires Customer Support to enable it.

Metadata API

Added information about new fields on the EACSettings metadata type.

Release Updates

Added reference to the Removal of Guest User Access to Recognition Badges in Experience Builder Sites release update.

Append New Data to Event Monitoring Analytics App Datasets (Beta)

Added a note to contact Salesforce to enable this beta feature.

Removed: Get Rich Text Email Line Breaks from Long Text Area Fields

This feature isn't quite ready for showtime, so we're removing it for now while we make improvements. We'll let you know once it's back up.

Connect Your Customers to the Correct Service Agents Using Omni-Channel Flow (Generally Available)

Removed information about the Channel-Object Linking feature, which isn't available in this release.

Popularize Data-Driven Decision-Making with Ask Data for Salesforce (Beta)

Changed the status of the feature from beta to pilot.

September 15, 2021

Salesforce Apps for Slack Release Notes

Added the Slack Apps section to the release notes.

September 13, 2021

New and Changed Standard Platform Events

Added new platform event that supports Flow Orchestrator (Beta): FlowOrchestrationEvent.

Metadata API

Corrected metadata types for Flow Orchestrator (Beta): FlowStageStep, FlowOrchestratedStage, and FlowStageStepAssignee

New Action Type Value in Loyalty Management

Added information about the new IndustriesLoyaltySettings metadata type.

Cache Namespace

Added information about versioned behavior change in methods that accept `key` parameters in the `Session` and `Org` classes.

Extend User Sessions for High Volume Customer Portal Users (Beta)

Added information about features to extend user login sessions.

Support for Compound Fields in Standard Forms

Added to the release note for Einstein Vision. We added support for compound address field in standard forms.

Specify Tracker Domains for List Email Sends

Added a release note about tracker domain availability in the Pardot email experience.

Monitor Service Cloud Voice on the Trust Site

Added a release note for Service Cloud Voice. We added support for monitoring the status of the Service Cloud Voice service in real time on the Salesforce trust site.

Simplify Metadata for myTrailhead Units

Added a release note to announce that the Tags category no longer applies to any content in myTrailhead. Authors now enter points for a unit, and don't allocate points across tags.

September 9, 2021

Removed: Sustainability

Removed release notes about Sustainability.

September 6, 2021

You Asked for It!

Added Ideas that we delivered.

Review Updated Label Translations

Added a release note about updated object, tab, and field name translations.

Metadata API

Added information about the `psaExpirationUIEnabled` field on the `UserManagementSettings` Metadata type.

Added information about the new value for the `processType` field on the `Flow` metadata type.

Enforce CORS Allowlist for Lightning Apps (Release Update)

Clarified that the release update is enforcing the CORS allowlist for Lightning apps on the server though it's already enforced on the browser.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Release Update)

The update, scheduled for enforcement in Spring '22, is now enforced in Winter '23.

Remove Invalid Characters from Managed Package Translations

Removed the underscore (`_`) from the list of invalid characters.

Automate Assignments for More Territories

Added link to information about the `AssignRecords()` Apex method.

Pardot Classic App is Being Retired

Added clarification for which app is being retired.

Medication Management

Replaced the term "clinicians" with "providers and care coordinators" for clarity.

Launch Monthly Invoice Runs on the Last Day of the Month

Added a release note about a new invoice scheduler field.

Jump Start Intelligent Solutions Using Recipe-Powered Story Templates

Announce use of recipes instead of dataflows in story templates.

See Sales Cadence and Sales Rep Performance at a Glance

Removed information about a report titled Pipeline Generated by Sales Cadence.

August 30, 2021

Solve Cross-Cloud Use Cases with Salesforce Solution Kits

Added a release note about 4 new Solution Kits.

Customer 360 Guide for Consumer Goods

Added release notes about the Customer 360 Guide for Consumer Goods.

Metadata API

Added information about the `tm2BypassRealignAccInsert` field on the `Territory2Settings` metadata type.

New and Changed Connect REST API Resources and New and Changed Connect in Apex Classes

Removed information about CMS Managed Content resources and classes that aren't supported.

Flow and Process Run-Time Improvements in API Version 53.0

Added a release note on specifying the default workflow user to run schedule-triggered flows.

Added a release note on correctly evaluating the true and false global constants in conditions in some elements.

New and Changed Objects

Added a release note about the addition of the Scorecard, ScorecardMetric, and ScorecardAssociation objects.

Associate Errors with the Right Lightning Components for Screen Readers

Corrected the Where section.

Make Custom Screen Components React to Other Components on the Same Flow Screen (Pilot)

Corrected the Where section. In [How and When Do Features Become Available?](#), moved the release note's checkbox to Contact Salesforce to enable.

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

Added information about new class that supports Flow Orchestrator (Beta): ConnectApi.Orchestration.

New and Changed Connect REST API Resources

Added information about new resource that supports Flow Orchestrator (Beta): /connect/interaction/orchestration/instances.

Metadata API

Added information about the `enablePreventBadgeGuestAccess` field on the CommunitiesSettings metadata type.

August 23, 2021

Update Tasks and Events Reports for More Accurate Data

Added more information about creating a report with the `CompletedDateTime` field.

Get Email Alerts About Voice Issues (Pilot)

Added a release note about the Service Cloud Voice Customer Alerts pilot.

Enforce OAuth Scope for Lightning Apps (Release 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.

Connect to More Elements Across the Auto-Layout Canvas (Beta)

Added information about the Connect to element option replacing the Merge with another path option.

Use the Organization-Wide Defaults Sharing Setting to Control Access to Products

Changed B2B Commerce API information to specify that access to products is based on entitlements. Added the sharing setting name (Default External Access) to clarify recommended settings.

View Flow Error Details More Quickly in Flow Builder

Added a release note about a behavior change to flow error details in Flow Builder.

Field Values for Interview Status Are Paused for Paused Flow Interviews

Added a release note about a behavior change to the Interview Status field on paused flow interviews.

Error Details for Referenced Flows and Pause Elements from Managed Packages Are Hidden

Added a release note about a behavior change to flow error details for flows from managed packages.

August 16, 2021

Salesforce Winter '22 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 to the [Release Readiness Trailblazers](#) group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Winter22Feedback.
- **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

- [Key Dates for the Winter '22 Sandbox Preview](#). 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.
- [Winter '22 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.
- [Winter '22 Release Website](#). Check out the new features.
- [Winter '22 Release Highlights Module](#). Get the Winter '22 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 Winter '22 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	✓			
Supported Browsers and Devices for Salesforce Classic	✓			
Supported Browsers for Tableau CRM	✓			

Salesforce Overall

Winter '22 brings a flurry of new features and improvements. Enjoy smarter searching with Einstein Search, available by default and at no extra charge. View and manage permission set licenses more efficiently. Use the Your Account app to view, pay, and download invoices for your Salesforce subscriptions. Check out the many exciting improvements to User Engagement, Salesforce Surveys, and Salesforce Scheduler. And remember, on February 1, 2022, all your internal users who log in to Salesforce through the user interface must use Multi-Factor Authentication.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Get Ready for the Future Requirement to Enable Multi-Factor Authentication (MFA)			✓	
Keep Working with Tab-Focused Dialogs (Release Update)			✓	
See More Information About Permission Set Licenses		✓		
Add and Remove Permission Set License Assignments Faster		✓		
Solve Cross-Cloud Use Cases with Salesforce Solution Kits		✓		
User Engagement				
Point to Specific Elements on a Page with Targeted Prompts (Generally Available)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Show In-App Guidance for Specific Record Types	✓			
Create and View In-App Guidance in Setup	✓			
Learn About Salesforce In-App Content		✓		
Explore More Resources in the Guidance Center		✓		
Keep Track of Resources Inside the Guidance Center		✓		
Your Account App				
View Invoices with the Your Account App			✓	
Checkout Is Now Named Manage Subscription			✓	
Salesforce Surveys				
Engage More Customers Using Digital Engagement Channels	✓			
Personalize Post Feedback Followup Actions	✓			
Share Surveys with Team Members	✓			
Salesforce Scheduler				
Appointment Distribution			✓	
New Apex Methods			✓	
Other Improvements			✓	
Make the Most of the Improved Salesforce Scheduler Documentation			✓	
Search				
Einstein Search				
Welcome to Einstein Search: Now On by Default	✓			
Help Einstein Search Find the Right Results for Different Users (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assist Your Agents and Customers to Find Knowledge Articles (Pilot)			✓	
Get Search Results for More Objects	✓			

Analytics

Get unified sales and service data with a new Customer Insights app, make your modeling more accurate with improved validations, and find insights faster with a redesigned search experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Automatically Tune Your Dashboards to Your Business Goals with Dynamic Gauge Charts (Beta)			✓	
Update More Fields from the Report Run Page with Expanded Inline Editing (Beta)			✓	
Tableau CRM				
Setup and Data Integration				
Audit Usage Statistics for Auto-Installed Apps		✓		
Be a Connector Trailblazer with New and Improved Connector Versions		✓		
Output Your Tableau CRM Data to Amazon S3 (Generally Available)				✓
Access Salesforce Data Without Data Sync Using Direct Data for Recipes (Generally Available)	✓			
Supersize Recipe Creation	✓			
Navigate Data Prep with Accessible Keyboard Shortcuts	✓			
Filter Smarter with Custom Filter Logic	✓			
Bucket Smarter with Fuzzy Match for Data Prep Bucketing	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Guide the Optimal Number of Clusters	✓			
Get Unselected Values Included in Pivot Output	✓			
Reference Aggregation Results with Ease	✓			
Roll Up Hierarchical Data	✓			
Output Fully Qualified Names in .csv Headers	✓			
Prebuilt Templates and Apps				
Unify Sales and Service Analytics in the Customer Insights App	✓			
Visualize Your Pipeline Progression in the Revenue Operations App	✓			
Bring the Power of Analytics to Your Corporate and Investment Banking Deals	✓			
Kick-Start Your Customer Insights App Installations	✓			
Use Improved Keyboard Navigation for the Prebuilt Apps Wizard and Template Gallery	✓			
App Building				
Manage Dashboard Layouts with Ease	✓			
Design Richer Tooltips for Chart Widgets	✓			
Import Snowflake Data to Apps Using Live Datasets in Templates		✓		
Jump-Start Templated App Development with Dashboard Components		✓		
Control Where Null Values Appear in Charts and Tables	✓			
Give Your Users Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Beta)			✓	
Draw Insights on Salesforce CDP Data (Beta)	✓			
What's New in SAQL and SQL		✓		
Einstein Discovery				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Operationalize Externally Built Models in Salesforce (Generally Available)				✓
Translate Unstructured Data into Valuable Insights with Sentiment Analysis (Generally Available)	✓			
Add Einstein Discovery Insights to Your Flows	✓			
Gather Insights Directly from Your Snowflake Schema (Pilot)				✓
Deploy Better Models with Enhanced Model Quality Alerts				✓
Predict Outcomes for Multiple Categories with Multiclass Models (Pilot)				✓
Evaluate Model Performance with Validation Sets				✓
Speed Up Story Creation with Smart Sampling (Pilot)				✓
Get Reliable Insights from Unbalanced Data (Pilot)	✓			
Get Diagnostic Insights with the Insights API				✓
Jump Start Intelligent Solutions Using Recipe-Powered Story Templates				✓
Salesforce Data Pipelines				
Create External Data Connections Faster (Beta)		✓		
Tableau CRM for Everyone				
Choose Your Search Experience (Beta)			✓	
Popularize Data-Driven Decision-Making with Ask Data for Salesforce (Beta)			✓	
Control Who Sees What in an App with Asset Visibility (Generally Available)	✓			
Find All Your Learning Resources on the Help Clearinghouse Page	✓			
Analytics on Mobile				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Data When You're Offline (Generally Available)			✓	
Get the Latest Version of Tableau CRM for iOS and Android	✓			

Commerce

Commerce Cloud enhancements include new and updated features for B2B Commerce on Lightning Experience, B2B2C Commerce, Salesforce Order Management, and Omnichannel Inventory.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
B2B Commerce on Lightning Experience				
Use Promotions to Drive B2B Commerce on Lightning Experience	✓			
Customize Your B2B Store's Checkout Experience with an Enhanced Checkout Flow	✓			
Add Fractional Product Quantities			✓	
Define and Select Product Quantities with the Quantity Selector			✓	
Import Products at the Global Level	✓			
Edit and View Workspaces More Efficiently	✓			
Create a B2B Store on an Existing Experience Cloud Site	✓			
Use Modular Components on the Product Detail Page			✓	
Automatically Display the Most Relevant Facets for B2B Commerce Search			✓	
Customers Can View About 5,000 Results per Search Request in B2B Commerce Search			✓	
Rebuild the Search Index up to 60 Times per Hour in B2B Commerce Search			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search Indexes Deleted After 60 Days of Inactivity for B2B Commerce Search			✓	
Set Up Your Org for Commerce More Easily		✓		
Modernize the B2B Commerce Order Experience with Salesforce Order Management			✓	
Resume Shopping Without Canceling Checkout	✓			
Add a Buyer Group Related List to Your Account Record Pages			✓	
Use Buyer Group User Permissions to Share Access to Buyer Group Members			✓	
Create Secondary Carts Using the Connect API	✓			
See Only Categories with Entitled Products When Browsing Categories			✓	
Use the Organization-Wide Defaults Sharing Setting to Control Access to Products			✓	
Display All Category Navigation Menu Items			✓	
Give Buyers a Complete View of Their Account's Order History	✓			
B2B2C Commerce				
Import Products at the Global Level		✓		
Do More with B2C Data Import		✓		
Edit and View Workspaces More Efficiently	✓			
Increase Shopper Conversion with Customers Also Bought Einstein Recommendations			✓	
Automatically Display the Most Relevant Facets for B2B2C Commerce Search			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customers Can View About 5,000 Results per Search Request in B2B2C Commerce Search			✓	
Rebuild the Search Index up to 60 Times per Hour in B2B2C Commerce Search			✓	
Search Indexes Deleted After 60 Days of Inactivity for B2B2C Commerce Search			✓	
Set Up Your Org for Commerce More Easily		✓		
Free Up Storage With Weekly Job that Deletes Expired B2B2C Commerce Guest Carts	✓			
Salesforce Order Management				
Modernize the B2B Commerce Order Experience with Salesforce Order Management			✓	
Reship Lost or Missing Order Items			✓	
Handle Orders with Multiple Payments More Robustly		✓		
Associate Return Shipments with Return Orders	✓			
Apply Salesforce Duplicate Management to Shopper Records from B2C Commerce			✓	
Include Custom Email Data in B2C Commerce Orders			✓	
Categorize Sales Channels by Business Type	✓			
Categorize Order Summaries as B2C or B2B	✓			
Edit Order Delivery Information	✓			
Omnichannel Inventory				
Access Omnichannel Inventory Headless APIs with Your Salesforce Credentials			✓	

Customization

Create more dynamic and performant Lightning pages with Dynamic Interactions and improvements to Performance Analysis for App Builder. Choose from a larger selection of publicly available APIs thanks to added support for larger spec sizes and expanded limits for operations, actions, and objects. Support your users wherever they work with new time zones, languages, and locales.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning App Builder				
Build More Interactive Lightning Pages with Dynamic Interactions		✓		
Bring Dynamic Interactions to Your Dynamic Actions Bar (Pilot)				✓
Let Org-Specific Metrics Guide Your Lightning Page Performance Improvements		✓		
Get Performance Analysis for App Builder Recommendations Automatically		✓		
Improve Page Performance with More Custom Lightning Component Analysis		✓		
Use Flow Orchestrator Work Guide to Connect Users with Tasks (Beta)		✓		
External Services				
Use External Services for MuleSoft to Generate Actions (Generally Available)			✓	
Register More API Specs with Revised and Expanded Operation, Action, and Object Limits		✓		
Map Non-Standard Media Types in Your Registration		✓		
Unlock the Power of External Services in Einstein Bot Builder		✓		
Major Enhancements to the Trailhead Experience		✓		
External Services UI Is Now Fully Compliant with Salesforce Accessibility Standards		✓		
Globalization				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Select New Time Zones	✓			
Connect with More Customers with New Languages and Locales	✓			
Prepare for Updated Locale Formats	✓			
Review Updated Label Translations	✓			
Enable ICU Locale Formats (Release Update)			✓	
Sharing				
Hide More Personal Information Fields from External Users	✓			
Control Access to Sensitive Data with Restriction Rules (Generally Available)		✓		
Control the Default Records Your Users See with Scoping Rules (Beta)		✓		
Profiles and Permissions				
Grant Access Based on Activated User Sessions for Permission Set Groups		✓		
Create Custom Profiles from Scratch via the SOAP API		✓		
Manage Assignment Expiration in Permission Sets and Permission Set Groups (Beta)			✓	
Grant Access to the DeveloperName Field to Users Who Require It		✓		
Einstein Recommendation Builder				
Use a Managed Package to Deploy Custom Recommendations			✓	
Try Einstein and Build Recommendations Your Way			✓	
General Setup				
Get Enhanced Functionality for Syncing an External Data Source		✓		

Development

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				
Secure Your Components Better, Stronger, Faster with Lightning Web Security (Beta)		✓		
Expose Events in the Lightning App Builder		✓		
View Dependencies for Lightning Web Components		✓		
Limit for Number of Actions in a Boxcar Request Was Added		✓		
Add User-Authorized Cookie Consent to Your Lightning Web Components			✓	
DOM API Changes May Require UI Test Updates		✓		
Non-Composed Events Follow Shadow DOM Semantics		✓		
Create Custom Property Editors That Use Literal Values for Complex Data Inputs		✓		
Lightning Components Release Updates				
Securely Access Aura Components (Release Update)		✓		
Enforce OAuth Scope for Lightning Apps (Release Update)			✓	
Enforce CORS Allowlist for Lightning Apps (Release Update)			✓	
Prevent Consecutive API Navigation Calls (Release Update)		✓		
Enable Secure Static Resources for Lightning Components (Release Update)			✓	
Einstein Vision and Language				
Einstein Vision				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Images with Multiple Tables on a Page		✓		
Detect Text in PDFs with Einstein OCR (Generally Available)		✓		
Train and Retrain a Dataset with Less Data		✓		
Support for Compound Fields in Standard Forms		✓		
Einstein Language				
Match Credit Card and US Social Security Numbers (Beta)		✓		
Create an Einstein Intent Model with Less Data		✓		
Match Phone Service Numbers in 15 Locales		✓		
Visualforce				
Securely Call the Visualforce Remoting API (Release Update)		✓		
Prevent Consecutive API Navigation Calls in Visualforce Pages (Release Update)		✓		
Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)		✓		
Apex				
Use the valueOf() Enum Method to Convert a Specified String to an Enum Constant Value		✓		
Use Mock Responses to Test Salesforce Functions		✓		
Call Invocable Actions from Apex (Developer Preview)			✓	
API				
Legacy API Versions 7.0 Through 20.0 Have Been Retired			✓	
Legacy API Versions 21.0 Through 30.0 Are Being Retired			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Updated Tooling API describeSObjects() referenceTo values		✓		
Packaging				
Remove Metadata Components from Second-Generation Managed Packages (Beta)				✓
Get an Early Look at Converting First-Generation Managed Packages (Developer Preview)				✓
Simplify Package Development by Creating and Specifying an Org Shape			✓	
Manage First-Generation Managed Packages More Easily		✓		
View Your Progress During Package Uninstalls		✓		
Remove Invalid Characters from Managed Package Translations	✓			
Sandboxes				
Updates to Inactive Sandbox Expiration Process		✓		
Platform Development Tools				
Develop Platform Apps with Ease		✓		
Lightning Design System				
Accessibility Updates for Selection List Components		✓		
Lightning Design System Component Blueprint Updates		✓		
Salesforce Functions				
Unleash the Power of Elastic Compute with Salesforce Functions (Generally Available)		✓		
AppExchange Partners				
Analyze Tableau CRM Lens and Dashboard Usage with AppExchange App Analytics				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Learn More About Subscriber Orgs with New AppExchange App Analytics Package Summary Fields				✓
Usage Metrics Has Been Retired				✓
Deepen Your Analysis with the AppExchange App Analytics Developer Cookbook				✓
Monitor Your AMP Promotion Performance in the AppExchange Marketplace Analytics Dashboard		✓		
Change Data Capture				
Change Data Capture Entity Selections from AppExchange Packages No Longer Count Against Your Allocation		✓		
Platform Events				
Filter Your Stream of Platform Events with Channels (Pilot)				✓
Maximum Batch Size of Platform Events Is Now 200		✓		

Einstein Automate

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (beta). 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			✓	
OmniStudio				✓
Einstein Bots				
Teach Your Bot to Speak Multiple Languages (Beta)	✓			
Get More from Your Knowledge Base with Article Answers Improvements (Beta)	✓	✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Generate Utterances in More Languages with Input Recommender (Beta)		✓		
Solve Bot Problems Fast with Improved Bot Analytics	✓			
Unlock the Power of External Services in Bot Builder		✓		
Build Bots Faster from a Template (Generally Available)		✓		
Reuse Your Einstein.ai Intent Models Across Other External Orgs (Beta)	✓			
Collect and Manage Customer Information with New System Entities		✓		
Access Bots Faster Using the Improved Setup Home Page	✓			
Channels Are Now Connections	✓			
Flow Orchestrator (Beta)				
Orchestrate Multi-User Processes with Flow Orchestrator (Beta)		✓		
Increase Productivity with Flow Orchestrator Work Guide (Beta)			✓	
Identify Bottlenecks and Opportunities with Flow Orchestrator (Beta)		✓		
Salesforce Flow				
Flow Builder				
Connect a Record-Triggered Flow to an External System Using an Asynchronous Path		✓		
Call Another Flow from a Record-Triggered Flow Using a Subflow Element		✓		
Roll Back Pending Record Changes When a Flow Element Fails at Run Time		✓		
Supercharge Scheduled Paths with Enhancements for Minutes, Batching, and Limits		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Send an Outbound Message from Your Record-Triggered Flow		✓		
Enjoy a Streamlined Trigger Setup Experience in Flow Builder		✓		
Translate Labels for More Flow Screen Components with Translation Workbench		✓		
Customize Button Labels in the Flow Screen Footer (Beta)		✓		
Connect to More Elements Across the Auto-Layout Canvas (Beta)		✓		
Read Loops More Easily in Auto-Layout (Beta)		✓		
Set Up Flow Screen Choice Options with Fewer Clicks		✓		
Edit Choice Resources Directly from Flow Screen Editor		✓		
Avoid Creating Incompatible Resources from Choice Components		✓		
Navigate Flow Builder More Easily with Improved Keyboard Shortcuts (Beta)		✓		
Create a Managed-Installed Flow That Admins Can Override and Customize		✓		
Other Changes to Flow Screen Components	✓			
Flow Debugging				
Change Record Field Values Temporarily While Debugging Record-Triggered Flows		✓		
Debug Scheduled Paths in Record-Triggered Flows		✓		
View the Flow Interview GUID in a Flow Error Email		✓		
Choose More Options When You Debug a Flow		✓		
View Flow Error Details More Quickly in Flow Builder		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Error Details for Referenced Flows and Pause Elements from Managed Packages Are Hidden		✓		
Flow Management				
View All Triggering Objects and Platform Events for Triggered Flows		✓		
Analyze Flow Execution Events in Event Monitoring		✓		
Send Email Notifications for Every Automated Field Update		✓		
Run Optimizer to Get Recommendations for Migrating Your Workflow Rules to Flows		✓		
Run Flows Permission is Being Removed	✓			
Field Values for Interview Status Are Paused for Paused Flow Interviews		✓		
Platform Events Maximum Batch Size Is 200		✓		
Multi-Select Picklist Screen Component Values No Longer Include an Extra Space		✓		
Flow Extensions				
Configure Flow Screen Components and Actions That Have Record and Apex-Defined Inputs		✓		
Generate Actions for Flow Builder from External Services for MuleSoft (Generally Available)				✓
Associate Errors with the Right Lightning Components for Screen Readers		✓		
Make Custom Screen Components React to Other Components on the Same Flow Screen (Pilot)				✓
Get Insights and Intelligence in Your Flows		✓		
Manage High Velocity Sales Cadence Targets in Your Flows		✓		
Flow and Process Release Updates				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)			✓	
Analyze Screen Flow Usage (Release Update)			✓	
Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas (Release Update)			✓	
Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)			✓	
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✓	
Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Release Update)			✓	
Flow and Process Run-Time Improvements in API Version 53.0		✓		
Einstein Next Best Action				
Build Einstein Next Best Action Strategies in Flow Builder (Pilot)				✓
Show Flow-Driven Recommendations on Lightning App Pages (Pilot)				✓
Einstein Recommendation Builder			✓	

Experience Cloud

Use our new Microsite template, which is based on the Lightning Web Runtime (LWR), to capture user data and create leads without the overhead of developing a complete website. Archive sites that outlived their usefulness and free up space to create the sites you need. Optimize your site performance with several content delivery network (CDN) enhancements. And build LWR sites more quickly with several new drag-and-drop components.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Capture Leads and Deliver Fresh Content with the Microsite Template			✓	
Archive Experience Cloud Sites (Closed Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Experience Builder Sites				
Redirect Users Within an Experience Cloud Site		✓		
Fine-Tune Your LWR Sites with New Branding Properties		✓		
Set the Default Language in LWR Sites		✓		
Use Lightning Message Service in Aura and LWR Site Pages (Generally Available)		✓		
Automatically Complete Addresses in Aura Sites			✓	
Differentiate Between the Build Your Own Templates for Aura and LWR Sites		✓		
Use Audiences as Criteria for Other Audiences		✓		
Users Directed to Previous Page or Homepage After Deleting a Record in a Site	✓			
Paste Images in Chatter Posts and Comments	✓			
Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App		✓		
Lightning Components in Experience Builder				
Add Content to LWR Sites with New Components		✓		
Dynamically Add Content to Your LWR Sites with Data Binding in LWC Components		✓		
Make Cross-Cloud Connections with the Marketing Cloud Form Component (Pilot)			✓	
Developer Productivity				
Use Expression Language with Data Binding in LWR Sites		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Page References Now Support External Record Routes		✓		
Set Up Tab Bar Navigation for Mobile Publisher Apps in ExperienceBundle		✓		
Incorporate User-Authorized Cookie Consent into Your Sites			✓	
Use the @salesforce/apexContinuation Scoped Module in LWR Sites		✓		
Performance				
Automatically Get CDN for Digital Experiences	✓			
Use Single Certificates with the CDN for Digital Experiences			✓	
Improve Self-Registration Performance for High-Scale Sites (Pilot)				✓
Get Improved Self-Registration Performance with Account Role Optimization			✓	
Use the Customizable Service Not Available Page for LWR and Aura Sites			✓	
Load Pages Faster with HTML Document Caching in LWR Sites		✓		
Get Ready for Salesforce Edge Network for Custom Domains	✓			
Security and Sharing				
Hide More Personal Information Fields		✓		
Create Sharing Rules to Retain and Control Guest Users' Product Access (Release Update)			✓	
Bid Farewell to Run Flows for Guest Users			✓	
Removal of Guest User Access to Recognition Badges in Experience Builder Sites (Release Update)		✓		
Other Changes				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More Contact Information on Portal Users	✓			
Customize Your Experience Cloud Site's Device Activation Emails		✓		
Specify a Language for Email and SMS Messages When Using initSelfRegistration		✓		
Files Connect for SharePoint On-Premises is Being Retired		✓		

Field Service

Let customers efficiently set and manage their appointments without calls with Self-Service Scheduling for Appointment Assistant. Save time and money by giving your customers technical support without going on-site with Visual Remote Assistant. Prevent costly maintenance missteps by creating criteria-based asset maintenance plans. Enhanced features in shift patterns and templates help you streamline resource planning and scheduling. And with custom actions, make Work Plans work better for your business.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Resource Management				
Make Resource Planning Easier with Enhanced Shift Patterns and Templates	✓			
Take the Guesswork Out of Scheduling Shifts in Different Time Zones	✓			
Ease Shift Planning with Calendar and Shift Schedule Enhancements	✓			
Share Records with Manual Sharing for Field Service	✓			
Asset Management				
Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria (Beta)		✓		
Schedule Recurring Work Rules Without Guesswork		✓		
Administration and Processes				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhance the Usability of the Work Plans Lightning Web Component with Custom Actions			✓	
Give Users Access to Work Plans on Their Experience Builder Site			✓	
Customer Engagement				
Give Your Customers Control over Their Appointments			✓	
Let Back-Office Workers See What Customers See			✓	
Personalize the Real-Time Location Map with Custom Icons			✓	
Expand Remote Video Capabilities for Mobile Workers with the Visual Remote Assistant Mobile App			✓	
Facilitate Virtual Appointments Using Visual Remote Assistant			✓	
Improve Collaboration by Sharing Images during a Remote Visual Session			✓	
Deliver Service Anytime, Anywhere with Visual Remote Assistance for Sales and Experience Clouds			✓	
Boost Customer Support by Connecting Customers to the Mobile App from Their Regional App Store			✓	
Enhance Your Visual Experience by Customizing Augmented Reality Magic Markers			✓	
Mobile				
Enhance Work Plans Usability with Custom Actions			✓	
Easily Transfer Products Between Locations		✓		
Stop Deep Link Security Dialogs from Interrupting Your Work (Beta)		✓		

Industries

Industries solutions for business verticals keep getting smarter and easier to use. Consumer Goods Cloud helps manage store visits and monitor stock better. Financial Services Cloud adds deal management and branch management. Health Cloud introduces automated benefit verification and user-friendly appointments. Manufacturing Cloud brings enhanced forecasting and SKU management. Public Sector Cloud makes licensing and permitting simpler and faster. Industries products that you can use in more than one Industries cloud, such as the data processing engine and decision tables, get significant enhancements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Consumer Goods Cloud				
Consumer Goods Cloud Offline Mobile App				
See All Visit Details on One Page			✓	
Complete All Your Tasks Offline			✓	
Optimize Visit Time			✓	
Use the App on Your Tablet			✓	
Get a Head Start on Your Day			✓	
Customize Your App			✓	
Have the Right Data with You, Always!			✓	
Boost Field Reps' Productivity with Product Sequencing	✓			
Manage Product Availability with Account Hierarchy for Products (Generally Available)			✓	
Maximize Store Sales by Using Predictions			✓	
Customer 360 Guide for Consumer Goods				
Explore Consumer Goods Business Scenarios	✓			
Changed Objects in Consumer Goods Cloud		✓		
Financial Services Cloud				
Financial Deal Management				
Relate Multiple Financial Deals to Interactions and Interaction Summaries		✓		
Ensure Consistency and Compliance in Financial Deal Engagements with Action Plans			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Guide Deal Teams Toward Success with Path			✓	
Interaction Summaries				
Get Details for an Interaction Summary Faster	✓			
Sort Interaction Summaries	✓			
Find Interaction Summaries Faster		✓		
More Flexible Performance Tracking with Record Association Builder				
Record Association Builder Supports More Financial Services Cloud Objects			✓	
Build Associations with Custom Objects			✓	
Enhance Branch Performance Tracking with Record Association Builder			✓	
Add Association Criteria to Reports			✓	
Intelligent Document Automation				
Handle Multiparty Consent Authorization Requests	✓			
Insurance for Financial Services Cloud				
Manage Claims and Policies Effectively with Insurance Claims and Policy Analytics (Generally Available)	✓			
Other Financial Services Cloud Changes				
Increase Security for Interaction Summaries and Financial Deals with Shield Platform Encryption			✓	
Make It Easier to Share Records		✓		
Remove Participants Selected for Sharing Records with a Single Click	✓			
New and Changed Financial Services Cloud Object Fields		✓		
Health Cloud				
Intelligent Appointment Management				
Self-Schedule Appointments from Anywhere			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give Users Appointment Scheduling Access			✓	
Switch Between Multiple Appointment Configurations			✓	
Easier Setup for Intelligent Appointment Management			✓	
Show the Next Available Appointment	✓			
Specify a Single Source for Appointment Data			✓	
Customize Your Appointment Booking URL			✓	
Provide User-Friendly Appointment Reasons			✓	
Medication Management				
Plan Medications Better with the Patient Medication Manager Lightning Component			✓	
Add Medications Seamlessly Using the Built-In Add Medication Flow	✓			
Provider Network Management				
Manage Network Participations			✓	
Set Up Provider Search Faster			✓	
Ease Your Transition to Person Accounts				
Verify Patient Benefits			✓	
Improve Data Extraction Efficiency by Using Confidence-Level Scores			✓	
Candidate Patient Object Is No More			✓	
Replacing the EHR Data Model with the Clinical Data Model			✓	
Health Cloud Has New and Changed Objects		✓		
Connect REST API		✓		
Manufacturing Cloud				
Generate Holistic and Accurate Account Forecasts			✓	
Leverage Data Processing Engine Definitions for Forecast Calculations			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Define Sales Agreements Flexibly with Agreements for Product Categories			✓	
Do More with Manufacturing Cloud for Service			✓	
New and Changed Objects for Manufacturing Cloud		✓		
New and Changed Invocable Actions in Manufacturing Cloud		✓		
New Action Type Value in Manufacturing Cloud		✓		
Public Sector Solutions				
Complete Inspections Virtually with the Inspection Management Desktop App			✓	
Empower Your Employees with the Employee Experience for Public Sector Permission Set			✓	
Rebate Management				
Define Product-Based Eligibility Easily and Quickly with Product Filter Type on Program Rebate Type			✓	
Do More with the New and Enhanced Template Data Processing Engine Definitions			✓	
Rebate Analytics				
Get Business Insights to Drive Partner Sales	✓			
Track Your Accruals	✓			
New and Changed Objects for Rebate Management		✓		
New and Changed Invocable Actions in Rebate Management		✓		
New Action Type Value in Rebate Management		✓		
Loyalty Management				
Member Groups				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Grow Your Loyalty Program with Group Memberships	✓			
Set Up a One-Time Process to Transfer Points		✓		
Get a Snapshot of the Points Transferred by a Member	✓			
Keep Your Group Balances Up to Date	✓			
View Points Transferred to a Group	✓			
Keep Members Plugged Into Their Groups		✓		
Escrow Points				
Keep Member Points in Escrow Until a Transaction Is Completed	✓			
Release a Member's Points from Escrow Automatically		✓		
Easily Track a Member's Escrow Points	✓			
Override the Escrow Period for Transactions	✓			
Use Updated Flow Actions to Easily Process Escrow Points		✓		
Reward Members at the Time of Activity			✓	
Promotion Management				
Determine Applicable Promotions for a Transaction		✓		
Get Promotions That Fit a Member Best		✓		
Update Member Progress Towards Unlocking a Promotion		✓		
Update a Member's Progress Easily		✓		
Voucher Management				
Give Members Flexibility to Use a Voucher Across Multiple Activities	✓			
Personalize the Value of Vouchers	✓			
Recall Vouchers for Reversed Transactions	✓			
Marketing Cloud Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Keep Members Informed About Points Earned or Spent			✓	
Get an Early Start on Your Tier Upgrade Emails			✓	
Trigger Automated Process Using Transaction Journals		✓		
Simplify the Tier Model Setup			✓	
Start Your Journey with the Loyalty Management Learning Map	✓			
Analytics for Loyalty				
Increase Promotion Revenue with Einstein Discovery Predictions (Beta)	✓			
Anticipate Liabilities with Time Series Forecasting	✓			
Other Improvements to Analytics for Loyalty	✓			
New and Changed Objects in Loyalty Management		✓		
New and Changed Invocable Actions in Loyalty Management		✓		
New Action Type Value in Loyalty Management		✓		
Connect REST API		✓		
Apex: New Items in Loyalty Management				
Industries Common Components				
Data Processing Engine				
Filter Records Based on a Set of Values		✓		
Find the Length of a Word or Number		✓		
Increase Your Data Processing Engine Limits		✓		
Get More Out of Your Definitions with Increased Limits		✓		
Get Your Definitions Up and Running Faster		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Run Definitions with Different Input Variable Values Simultaneously		✓		
Create Definitions with Manufacturing Cloud		✓		
Changed Objects in Data Processing Engine		✓		
Data Processing Engine Has a Changed Metadata Type		✓		
Batch Management				
Create Batch Management Jobs with Manufacturing Cloud		✓		
Use Metadata API instead of Objects to Create Batch Management Jobs		✓		
Changed Objects in Batch Management		✓		
Einstein Relationship Insights				
Explore More Object Relationships with Additional Person and Company Record Objects			✓	
Use Simple Model to Easily Explore Relationships	✓			
Store Object Configurations in a Dedicated Database			✓	
Get Relationship Recommendations from Multiple Sources			✓	
Find Items in Smart Tag View Easily by Searching with Keywords	✓			
Smarttagscanvasapp Is Renamed Einstein Relationship Insights Canvas App			✓	
Experience Improved Usability with Updated Labels	✓			
Omnistudio				
Connect REST API		✓		
Action Plans				
Collaborate Better on Action Plans Even Offline			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provide Better Insights Into Action Plan Items		✓		
Improve Timely Task Completion		✓		
Clean Up the Action Plan Template List		✓		
Use Intelligent Form Reader in Regions Compliant for Data Residency		✓		
Digital Process Automation	✓			
Monitor Documents as They're Transformed	✓			

Mobile

Get more done in the Salesforce mobile app with new features like the new full-width tablet app experience on iPad and Android tablets. Briefcase Builder helps make offline record data available to your users. Mobile Publisher offers users new distribution methods to best fit your org's needs.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
Salesforce Mobile App Requirements Have Changed	✓			
Help Your Users Personalize Their Content With Mobile Home (Generally Available)	✓			
Protect Your Data with Enhanced Mobile Security Updates				✓
Limited Access for New Users with Community Licenses			✓	
Run Your Business on Tablets (Beta)			✓	
Take Advantage of the Salesforce Mobile App Defaulting to Lightning Apps			✓	
Briefcase Builder			✓	
Mobile Publisher				
Mobile Publisher Requirements	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Distribution Methods for Your Branded Apps			✓	
Manage How URLs Open in the Experience Cloud App			✓	
Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App		✓		
Improved Sandbox Switching for the Mobile Publisher for Experience Cloud App (iOS)			✓	

myTrailhead

Enhance your myTrailhead learning experience with new options for fulfilling your company's unique training and enablement requirements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver Learning Content for Specific Audiences			✓	
Simplify Metadata for myTrailhead Units			✓	
Track the Success of Your myTrailhead Content			✓	
Edit and Save Trailmixes with Confidence			✓	
Connect to a SIFM-Enabled myTrailhead Subdomain in Slack			✓	
Connect to a SIFM-Enabled myTrailhead Subdomain on Mobile Devices			✓	
Broaden Your myTrailhead Content to More International Audiences			✓	

Pardot

Getting started with Pardot is easier than ever with the new setup assistant in Marketing Setup. You also get automation extensibility and landing page builder enhancements, Engagement Studio support for drag-and-drop builder emails, and Einstein Key Accounts Identification on list views. The key accounts feature and mailability changes are generally available.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Marketer Experience				
Send Slack Notifications to Pardot Users with Completion Actions (Beta)			✓	
Build Landing Pages Faster with Drag-And-Drop Editor			✓	
Take Your Automations Further with Pardot Extensibility Enhancements		✓		
Push Emails from Lightning Experience into Engagement Programs	✓			
Create Custom Components for the Email Content Builder	✓			
Specify Tracker Domains for List Email Sends	✓			
Enjoy Improved Prospect Mailability Insights (Generally Available)	✓			
Reset Bounce Counts on Prospect Records	✓			
Customize Prospect Unsubscribe and Resubscribe Page Content	✓			
See When and How Segmentation Prospect Lists Were Updated	✓			
Unarchived Dynamic Lists Retain Prospects	✓			
View IP Address for Prospect Activities in Pardot	✓			
New and Updated Pardot User Permissions	✓			
Plan for Pardot Drip Program Retirement		✓		
Add Rows and Columns in Email Content Builder Email Templates	✓			
Spread Out in Email Content Builder Email Templates with Column Padding	✓			
Indent Text in Rich Text Components in Email Content Builder Email Templates	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Navigate More Easily in Email Content Builder Email Templates with Breadcrumbs	✓			
Data and Content				
Explore Einstein Key Accounts on List Views (Generally Available)			✓	
Prepare Einstein Discovery in Fewer Clicks	✓			
Some B2B Marketing Analytics Datasets Were Fixed	✓			
CSS Class Name Was Changed	✓			
Filter Pardot Automations with Einstein Account Tier Field			✓	
Manage and Extend Pardot				
Set Up and Configure Pardot More Easily		✓		
Pardot API: New and Changed Items		✓		
Bring Your Own Encryption Keys to Pardot			✓	
Changes to Paused Connector Sync Behavior	✓			
Pardot Classic App Is Being Retired	✓			

Revenue

In Salesforce CPQ, a release update adds permissions to standard permission sets and updates Access permission sets. Salesforce Billing prevents duplicate payments by locking invoices until confirming a valid response from the payment gateway. Credit note lines now inherit the Tax Percentage field, revenue finance books support more finance periods, and a Customer Asset Lifecycle Management field was relabeled.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce CPQ				
Assign New Access Permission Sets and Review New Permissions (Release Update)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Permissions for Creating Contracts and Service Contracts			✓	
Salesforce Billing				
Prevent Duplicate Payments			✓	
Use More Finance Periods in Your Revenue Finance Books			✓	
On Credit Note Lines, See the Tax Percentage After You Cancel and Rebill			✓	
New Permissions for Creating Contracts and Service Contracts			✓	
A Lifecycle Management Field on Orders Was Relabeled	✓			
Launch Monthly Invoice Runs on the Last Day of the Month			✓	
Enable Encrypted Customer IDs for Payeezy ACH Payment Methods			✓	
New Requirements for Payeezy ACH Payment Methods			✓	

Sales

Pipeline Inspection lets you create custom filters, watch important opportunities, and see which deals are less likely to close in the current month. Show a Most Likely forecast category on the forecasts page. Assign territories quicker and put assignment rules on pause. Add Inbox users to any Einstein Activity Capture configuration. Salesforce Maps helps you automate assignments for large territories. Territory Planning gives you flexibility to design territories for in-person and virtual customer visits. High Velocity Sales lets you update active sales cadences and test different versions of email templates and call scripts on the same outreach step.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Pipeline Inspection				
Save Time by Creating Custom Pipeline Views and Filters	✓			
Flag Important Deals to Track Progress Closely	✓			
See Which Deals Are Unlikely to Close This Month with Einstein Deal Insights			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Prioritize Deals More Effectively with Tiered Einstein Opportunity Scores			✓	
Hold Sales Reps Accountable for Updating Opportunity Next Steps	✓			
See How Many Times Close Dates Are Pushed Out	✓			
Core Sales Features				
Collaborative Forecasts				
Track Forecast Categories Your Way			✓	
Bookmark Your Forecasts	✓			
Enterprise Territory Management				
Speed Up Account-Territory Assignment		✓		
Put Assignment Rules on Pause		✓		
Products				
Set Organization-Wide Sharing for Products (Release Update)			✓	
Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)			✓	
Other Changes in Core Sales Features				
Delete Your Original Territory Management Sharing Records (Release Update)			✓	
ForecastingSettings Was Restructured		✓		
Send Notifications When Updating Lead Owners via APEX			✓	
Productivity Features				
Einstein Activity Capture				
Include Salesforce Inbox Users in Any Einstein Activity Capture Configuration		✓		
See Consistent Event Data on the Activity Timeline and in Standard Reports			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add the Recommended Connections Component to Standard Layouts with Fewer Clicks			✓	
Prevent Sensitive Information from Appearing on the Activity Timeline	✓			
See When a Commitment Is Made to a Customer or Prospect	✓			
Ensure that User Data Doesn't Move Until Setup Is Complete		✓		
Choose Whether the Activities Dashboard Is Available			✓	
Email Experience				
Send List Email Your Way (Pilot)				✓
Use List Emails for Sales Cadence Automated Emails Automatically	✓			
Email Templates				
Add Rows and Columns in Email Template Builder	✓			
Get Some Breathing Room with Column Padding in Email Template Builder	✓			
Add Variety with Indentations in Rich Text Components in Email Template Builder	✓			
Navigate More Easily with Breadcrumbs in Email Template Builder	✓			
Include Salesforce Inline Image References in Email Template Builder Packages and Change Sets		✓		
Say More in a Lightning Email Template's Subject	✓			
Activities				
Sort Upcoming & Overdue Activities Intuitively	✓			
Filter and Sort the Activity Timeline with a New Icon	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update Tasks and Events Reports for More Accurate Data	✓			
Split Bulk Queries on the TaskRelation Table with PK Chunking		✓		
Salesforce Inbox				
Salesforce Inbox Mobile			✓	
WDC (Legacy Work.com)				
WDC (Legacy Work.com) Is Being Retired	✓			
Einstein Conversation Insights				
Match Opportunities to Voice and Video Calls Automatically			✓	
Filter by Opportunity Stage, Opportunity Amount, and Lead Status	✓			
Video Calls Display Title and Opportunity Contact Role	✓			
Analyze Service Calls in a Dedicated Conversation Insights Dashboard	✓			
Use Service Cloud Voice with Partner Telephony (Pilot)				✓
Salesforce Maps				
Salesforce Maps				
Automate Assignments for More Territories		✓		
Plot Any Salesforce Data on the Map			✓	
Identify Potential Customers Within Specific Markets	✓			
Fill Gaps in Today's Schedule from a Desktop			✓	
Salesforce Maps Territory Planning				
Optimize Areas for In-Person and Remote Business	✓			
Plan and Visualize Territories Using a Heat Map	✓			
Publish Territory Data for Other Systems	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Territory Models from Salesforce or External Data Sources	✓			
Fine-Tune Account Assignments in Salesforce Territory Models	✓			
Salesforce Maps Live Tracking				
Automate Driver Location and Metrics Reporting	✓			
Track Work-Related Miles Using Mobile Devices			✓	
High Velocity Sales				
Sales Cadences				
Edit Active Sales Cadences	✓			
Find Out Which Email Templates and Call Scripts Perform Best with Variant Testing			✓	
See Sales Cadence and Sales Rep Performance at a Glance	✓			
Organize Sales Cadence Email Templates	✓			
Add and Remove Sales Cadence Targets from Reports	✓			
Send Sales Cadence Automated Emails as List Emails to Save Data	✓			
New and Changed Invocable Actions in High Velocity Sales		✓		
Integration with Google				
Gmail Integration				
Get Improved Event Logging in the Gmail Integration			✓	
Log Emails Manually from the Gmail Integration with Inbox When Einstein Activity Capture Is On	✓			
Simplified Multi-Factor Authentication in the Gmail Integration		✓		
Support for the Gmail Integration in Older Versions of Google Chrome Is Ending			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Sync for Google				
Check Out Einstein Activity Capture Improvements for Google Customers			✓	
Integration with Microsoft				
Outlook Integration				
Get Improved Event Logging in the Outlook Integration			✓	
Log Emails Manually from the Outlook Integration with Inbox When Einstein Activity Capture Is On	✓			
Simplified Multi-Factor Authentication in the Outlook Integration		✓		
Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending			✓	
Lightning Sync for Microsoft® Exchange®				
Move to Einstein Activity Capture Easily			✓	
Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers			✓	
Salesforce for Outlook				
Salesforce for Outlook Is Being Retired in June 2023	✓			
Find Version-Specific Salesforce for Outlook Release Notes	✓			
Other Changes in the Sales Cloud				
Access to Pipeline Inspection Includes a System User, Profile, and Package		✓		
Feedback Option for Einstein Email Insights Was Removed	✓			

Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Quip. Let your users choose where they work, stay in Quip with documents that autofill with Salesforce data and records created from Salesforce live apps, or work in Salesforce with the Template Library in Lightning Experience. Speed up your Quip setup with the New Document global quick action automatically added to all your global publisher layouts. Learn about the latest updates to Salesforce Anywhere Beta features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
When to Expect Salesforce Anywhere Features	✓			
Create Documents from Templates from Anywhere	✓			
Simplify Document Creation in Lightning Experience with New Document Global Action Improvements		✓		
Understand Who Can Access a Document with Synced Sharing Enhancements	✓			
Salesforce Anywhere Beta Is Being Retired	✓			
The Collaboration User Engagement Records Table Is Being Retired	✓			
Share Your Live Apps with Selected Quip Sites		✓		
Simplify Quip User Account Management with the New Bulk SCIM API Method		✓		
Simplify Bulk Document Archiving with New Quip Admin API Methods		✓		
Automate Information Sharing and Document Editing in Quip		✓		
Get Better Performance with the Quip Automation API		✓		
Get the Enhanced Salesforce Anywhere Experience	✓			

Salesforce CDP

The latest round of Salesforce CDP updates directly addresses customer feedback and unlocks access to new data sources, such as Commerce Cloud. Look out for a more accessible experience for mapping data and major improvements in Identity Resolution. There's also a new Salesforce Web SDK to unify website instrumentation across Salesforce CDP and Interaction Studio.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create CRM Bundles with Data Kits from Your Salesforce CDP Data		✓		
Capture Event Updates on Calculated Insights, Identity Resolution, and Schema Changes	✓			
Enjoy an Improved Identity Resolution Experience	✓			
Take Control of Unified Profiles with Match Rules	✓			
Create Better Unified Individuals with Multiple Individual Rulesets	✓			
Drive Actions from Salesforce CDP with Data Actions	✓			
Download Datasets into Salesforce CDP to Use in Tableau Desktop	✓			
Stream Data from Your Own External Sources using Ingestion API			✓	
Connect to Mulesoft for a User-Friendly API Experience		✓		
Map Your Data in Table View	✓			
Draw Insights on Salesforce CDP Data Using Tableau CRM (Beta)	✓			
Connect Your B2C Commerce Data to Salesforce CDP	✓			
Salesforce Interactions Web SDK for Salesforce CDP and Interaction Studio		✓		
Get a Complete View of a Salesforce CDP Unified Individual with Profile Explorer	✓			
Create Streaming Insights in Real-Time	✓			
Create Calculated Insights with Insight Builder	✓			
Simplify Calculated Insights Building with Metrics on Metrics	✓			
Create Smarter Segments with the Power of Einstein Engagement Scores	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Segments Based on Many-1-Many Relationships	✓			
Find Customers to Engage with Again	✓			
Complex Calculated Insights Functions Now Supported in Segmentation	✓			
Find Activations Easily in Marketing Cloud Shared Data Extensions	✓			
Activate to Commerce Cloud to Personalize Commerce Experiences	✓			
Non-Aggregatable Measures Now Supported in Activation	✓			
New Calculated Insights Data Types Now Supported in Activation	✓			
Use the Privacy Data Model to Honor Customer Consent Preferences	✓			
Salesforce CDP API: New and Changed Items		✓		
Download Release Notes PDF for Salesforce CDP Releases Before Winter '22	✓			

Salesforce CMS

Preview your content before you publish to make sure things are just right.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Preview Salesforce CMS Content on Your Site		✓		

Security, Identity, and Privacy

To comply with browser requirements, you must have a My Domain, or we deploy one for you. Verify your identity with biometric built-in authenticators. To help you prepare for the multi-factor authentication (MFA) requirement, use the MFA Rollout Pack. Enjoy a more intuitive consent data model and Portability Policy dashboards. Event Monitoring includes four new event log file types and more detailed Transaction Security policy notification emails. Encrypt more Financial Services Cloud data at rest. Find sensitive data across your org

with the new Einstein Data Detect managed package (generally available). And Threat Detection integration with Security Center is now generally available, along with customizable alerts for monitoring security configuration changes.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Domains				
Deploy a My Domain (Release Update)			✓	
Enable User Email Domain Restrictions		✓		
Require SOAP API Calls to Log In with My Domain			✓	
Prepare for Your Custom Domain to Use Salesforce Edge Network	✓			
Enable Enhanced Domains (Release Update)			✓	
Domain HTTPS Option Was Renamed		✓		
Identity and Access Management				
Salesforce Identity for Your Employees				
Trailblazer.me Supports New Languages	✓			
Streamline Identity Verification with Built-In Authenticators (Beta)			✓	
Get Users Ready for Multi-Factor Authentication with Change Management Resources			✓	
MFA Challenges for Authentication Provider Single Sign-On Logins Are No Longer Enforced			✓	
Verify Logins in Users Reports	✓			
Require Users to Reauthenticate When Accessing Service Providers with Single Sign-On			✓	
Login Credentials Using URL Query Strings Are Disabled (Release Update)			✓	
Customize How Just-in-Time Provisioning Handlers Process Attributes in SAML Assertions		✓		
Identity Connect 7.1.1		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give Authorized Access to Salesforce CDP Data		✓		
OAuth 2.0 User-Agent Flow Supports mobileauth.salesforce.com/analytics Redirect URL for Refresh Tokens		✓		
Salesforce Identity for Your Customers				
Tailor Device Activation Emails for Experience Cloud Sites			✓	
Control the Language Used for Experience Cloud Self-Registration Verification Messages		✓		
Identity Cookies Have Shorter Durations	✓			
Email and SMS One-Time Password Codes Are Longer	✓			
Get Information About Named Credentials in the EventLogFile		✓		
Extend User Sessions for High Volume Customer Portal Users (Beta)		✓		
Privacy Center				
Consent Data Model Branding		✓		
Portability Policy Changes		✓		
Hard Delete Records in Privacy Center				
Salesforce Shield				
Einstein Data Detect				
Find Sensitive Data with Einstein Data Detect (Generally Available)		✓		
Event Monitoring				
Append New Data to Event Monitoring Analytics App Datasets (Beta)		✓		
Get More Informative Transaction Security Policy Notifications		✓		
Analyze Your Flows in the Flow Execution Event Type		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Information About CORS Violation Records in the EventLogFile		✓		
Get the Namespace of Installed Managed Packages That Access Named Credentials		✓		
Review Bulk API 2.0 Workload Information		✓		
Review Threat Detection Data in Security Center (Generally Available)		✓		
Field Audit Trail				
Retention Policy Now Associated with Only One Custom Object			✓	
Shield Platform Encryption				
Encrypt More Financial Services Cloud Data		✓		
Security Center				
Threat Detection Compatibility (Generally Available)		✓		
Create Alerts		✓		
Detail View Filters		✓		
Other Changes				
Prevent Data Loss with Backup and Restore (Generally Available)			✓	
Share Resources with Browser Extensions		✓		

Service

Take advantage of a wide range of new, intuitive Service Cloud features that help you and your team deliver efficient, flexible service. Try out Incident Management, which allows your team to diagnose root causes and resolve major incidents faster while creating a better customer experience. Use it to empower your service teams to quickly classify and prioritize work, assign the right experts, and streamline communication with customers. Workforce Engagement offers a queue-based workflow for planning and staffing tools so you can access the business analytics that you need faster. And set up Service Cloud Voice with Partner Telephony more easily with the new prescriptive setup experience, which includes templates and menus to help you create your contact center and sync it with your telephony provider.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Incident Management				
Diagnose, Track, and Prevent Service Interruptions with Incident Management	✓			
Service Setup				
Get Sample Surveys from the Service Setup Assistant			✓	
Channels				
Voice				
Streamline Your Partner Telephony Contact Center Setup (Prescriptive Setup)	✓			
Simplify Your Amazon Partner Telephony Setup	✓			
Route Calls with Omni-Channel Flows (Beta)	✓			
Analyze Service Calls in the Einstein Conversation Insights Dashboard	✓			
Get Actionable Call Insights with Einstein Conversation Insights for Partner Telephony (Pilot)				✓
Improve Reporting with Consistent Call Statuses	✓			
Define Omni-Channel Statuses for Missed and Declined Calls	✓			
Keep Your Lambda Functions Warm and Other Enhancements	✓			
Find Voice Calls Quickly with Global Search	✓			
Speed Up Agent Troubleshooting with Downloadable Call Logs	✓			
Transfer Callers to Agents with Search	✓			
Match Callers to End User Records with Phone Channels (Beta)				✓
Use Desk Phones with Service Cloud Voice (Generally Available)			✓	
Improve the Supervisor Reporting Experience with Recognizable Usernames	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Monitor Call Quality with Mean Opinion Scores	✓			
Monitor Service Cloud Voice on the Trust Site	✓			
Get Email Alerts About Voice Issues (Pilot)				✓
Voice Users Must Agree to Being Recorded	✓			
Respect Customer Privacy with Auto-Paused Call Transcription	✓			
Improve Caller Experiences with Enhanced Contact Flows	✓			
Messaging				
Route Messaging Sessions with Omni-Channel Flows (Beta)	✓			
Save Time with the End Session Mass Action		✓		
Chat				
Improve Your Control Over Objects Available Using findOrCreate API		✓		
Avoid Multiple Greetings in a Session		✓		
Workforce Engagement				
Create a Workload History, Intelligent Forecast, and Omni-Channel Plan in a Queue-Based Workflow	✓			
View the Omni-Channel Plan by Shifts, Not Time Intervals	✓			
Map Job Profiles to Queues with the Workforce Engagement Configuration App	✓			
Create Shifts in Bulk from Your Omni-Channel Plan	✓			
Set a Match Queues Scheduling Rule	✓			
Create Shifts from a Template	✓			
Filter a Workload History Based on Picklist or Text Fields	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Objectives for Streamlined Scheduling		✓		
Ease the Pain with Non-Standard Shifts	✓			
Routing				
Connect Your Customers to the Correct Service Agents Using Omni-Channel Flow (Generally Available)	✓			
Get a Head Start on Building Omni-Channel Flows with Templates	✓			
Give Agents More Context with a Customized Screen Pop	✓			
Einstein for Service				
Einstein Classification				
Upgrade Your Customer Service Materials with Smarter Reply Templates			✓	
Knowledge				
Review Knowledge Article Versions with Improved Accessibility Measures		✓		
Cases				
Add Tables to Emails	✓			
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)	✓			
Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)	✓			

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.

[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.



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

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

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	Microsoft® Edge Chromium	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Special setup considerations?	Not supported	Not supported	No	No	No	No
Limitations?	Yes	Yes	Yes	No	Yes	Yes



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

Tablets

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

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

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



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

Phones

For the best experience, use the Salesforce mobile app.

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

Where: Salesforce Classic is available in all editions.



Note: Using Salesforce Classic in a mobile browser isn’t supported. Instead, we recommend using the Salesforce mobile app when you’re working on a mobile device.



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

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



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

Supported Browsers for Tableau CRM

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

Salesforce Overall

Winter '22 brings a flurry of new features and improvements. Enjoy smarter searching with Einstein Search, available by default and at no extra charge. View and manage permission set licenses more efficiently. Use the Your Account app to view, pay, and download invoices for your Salesforce subscriptions. Check out the many exciting improvements to User Engagement, Salesforce Surveys, and Salesforce Scheduler. And remember, on February 1, 2022, all your internal users who log in to Salesforce through the user interface must use Multi-Factor Authentication.

IN THIS SECTION:

[General Enhancements](#)

Enable Multi-Factor Authentication at no extra cost. See more information about permission set licenses and add and remove them more quickly.

[User Engagement](#)

Targeted prompts are generally available, and in-app guidance is available on supported Setup pages. Additional options give you more control for when to show in-app guidance for record types. In the Guidance Center, explore more resource sets with new ways to manage what you see.

[Your Account App](#)

View and download invoices. In Salesforce Classic, the Checkout node was renamed.

[Salesforce Surveys](#)

Invite more participants and generate responses by sending survey invitations from Digital Engagement channels, such as WhatsApp and Facebook, or share the URL in an SMS. Make better decisions on what actions to take by adding more context in your data maps. Create meaningful actions in your map using merge fields. Share surveys and survey invitations from the Salesforce Lightning UI to collect feedback about survey design or collaborate better on the survey results and analytics.

[Salesforce Scheduler](#)

Allocate appointments evenly among service resources with resource-utilization-based appointment distribution. Use Apex methods to quickly create and update service appointments. Make more API calls with the increased per user, per hour Connect API request limit. And check out the new *Salesforce Scheduler Developer Guide* and the improved, standalone Salesforce Scheduler Help supplemented with flow variable documentation.

[Search](#)

Search brings intelligence and efficiency to users who are looking for relevant information in their Salesforce org. Users in Lightning Experience get the added benefits of AI-powered Einstein Search. The more users engage with Einstein Search, the more likely Einstein returns the most useful search results.

General Enhancements

Enable Multi-Factor Authentication at no extra cost. See more information about permission set licenses and add and remove them more quickly.

IN THIS SECTION:

[Get Ready for the Future Requirement to Enable Multi-Factor Authentication \(MFA\)](#)

On February 2, 2021, we announced a future requirement for all customers to enable multi-factor authentication (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.

[Keep Working with Tab-Focused Dialogs \(Release Update\)](#)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This update was first made available in Winter '20.

[See More Information About Permission Set Licenses](#)

See key details about your permission set licenses on the Company Information Setup page. In the permission set licenses related list, you get a snapshot of your licenses, their expiration dates, and the number of remaining seats. On each license's detail page, you now see which user, object, and custom permissions are available for the license. From this detail page, you can also view and manage user assignments.

[Add and Remove Permission Set License Assignments Faster](#)

Save time by assigning multiple users to a permission set license together or by removing multiple users all at once. On each permission set license detail page, you can select multiple users to complete bulk assignment operations. Previously, you added or removed users individually from each user's detail page.

[Solve Cross-Cloud Use Cases 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.

Get Ready for the Future Requirement to Enable Multi-Factor Authentication (MFA)

On February 2, 2021, we announced a future requirement for all customers to enable multi-factor authentication (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: Beginning February 1, 2022, per the [Salesforce Trust and Compliance Documentation](#), all Salesforce customers are contractually required to use MFA for direct and SSO logins to Salesforce products. 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 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*, and then select **Multi-Factor Authentication Assistant**. And to get customizable templates for rollout planning and change management, [download the MFA Rollout Pack](#).

SEE ALSO:

[Knowledge Article: Salesforce Multi-Factor Authentication FAQ](#)

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

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

[Get Users Ready for Multi-Factor Authentication with Change Management Resources](#)

[Get Guidance on the MFA Requirement](#)

Keep Working with Tab-Focused Dialogs (Release Update)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This update was first made available in Winter '20.

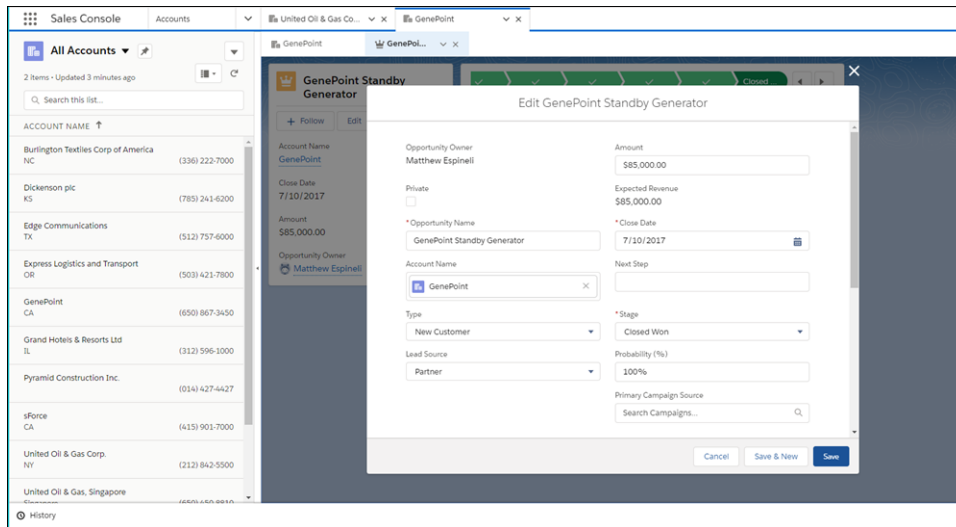
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing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

When: This update was first available in Winter '20 and is enforced in Spring '22. This update was originally scheduled to be 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: 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 a dialog require the focus of only the tab that triggered it, allowing users to interact with the rest of the app.

How: To review this release update, from Setup, in the Quick Find box, enter *Release Updates*, then select **Release Updates**. For Keep Working with Tab-Focused Dialogs, follow the testing and activation steps.

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



SEE ALSO:

[Release Updates](#)

See More Information About Permission Set Licenses

See key details about your permission set licenses on the Company Information Setup page. In the permission set licenses related list, you get a snapshot of your licenses, their expiration dates, and the number of remaining seats. On each license's detail page, you now see which user, object, and custom permissions are available for the license. From this detail page, you can also view and manage user assignments.

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

How: From Setup, in the Quick Find box, enter *Company Information*, and then select **Company Information**. Scroll down to the Permission Set Licenses related list for a quick glance at your licenses. For more details about a specific permission set license and to manage assignments, click the license name.

SEE ALSO:

[Add and Remove Permission Set License Assignments Faster](#)

[Salesforce Help: View and Manage Your Permission Set Licenses \(can be outdated or unavailable during release preview\)](#)

Add and Remove Permission Set License Assignments Faster

Save time by assigning multiple users to a permission set license together or by removing multiple users all at once. On each permission set license detail page, you can select multiple users to complete bulk assignment operations. Previously, you added or removed users individually from each user's detail page.

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

How: Before you remove the permission set license, you must remove the related assigned permissions from the user. Then, from Setup, in the Quick Find box, enter *Company Information*, and select **Company Information**. Scroll down to the permission set licenses related list, and click the name of the permission set license that you want to assign users to or remove users from. To see and remove current assignments, click **View Users**. To assign users, click **Assign Users**.

SEE ALSO:

[See More Information About Permission Set Licenses](#)

[Salesforce Help: Assign a Permission Set License to a User \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Remove a Permission Set License from a User \(can be outdated or unavailable during release preview\)](#)

Solve Cross-Cloud Use Cases 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.

- [Collect Health Verifications to Return to Work](#) — Verify your employees' COVID-19 health status to ensure safety when returning to the workplace.
- [Integrate B2C Commerce with Single Sign-On](#) — Reduce friction and ensure a secure connection by integrating B2C Commerce Account Manager and other Salesforce applications with your identity provider.
- [Register Customers with Passwordless Login](#) — Reduce password-related risks, improve authentication processes, and make it easier for your users to log in to frequently used applications with a well-implemented authentication and registration strategy. Passwordless login can make registration and access even simpler. Capture mobile-first markets and delight new user demographics by providing the ability to create an identity with your brand without forcing consumers to juggle yet another password. Customize login pages to reflect your brand and report on login activities from Salesforce to better understand customer engagement.
- [Use Interaction Studio to Personalize Experience Cloud Websites](#) — Personalize, make recommendations, and track user behavior in Experience Cloud using standard Interaction Studio functionality like banner recommendations and global templates.

SEE ALSO:

[Salesforce Help: Explore Salesforce Solution Kits](#)

User Engagement

Targeted prompts are generally available, and in-app guidance is available on supported Setup pages. Additional options give you more control for when to show in-app guidance for record types. In the Guidance Center, explore more resource sets with new ways to manage what you see.

IN THIS SECTION:

[Point to Specific Elements on a Page with Targeted Prompts \(Generally Available\)](#)

Target a specific page element to show your users exactly what you're referring to with the newest type of in-app guidance.

[Show In-App Guidance for Specific Record Types](#)

Now, you can choose if you want in-app guidance to appear for all or only a specific record type. And you can customize your message so that users get detailed help for the unique layout and picklists of different record types. Previously, when you created in-app guidance and assigned it to a record page with multiple record types, the in-app guidance appeared for all of its record types.

Create and View In-App Guidance in Setup

In-app guidance is available for supported Setup pages. View and author custom prompts and walkthroughs to enhance feature discovery and show users how to configure apps and features.

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.

Explore More Resources in the Guidance Center

The Guidance Center has new sets of resources for admins setting up Multi-Factor Authentication (MFA), Field Service, and Health Cloud. Spend time learning, not searching for content, to become an expert fast. Also, customers with Premier support can see which resources are included just for them. Look for the “Premier” tag on resources.

Keep Track of Resources Inside the Guidance Center

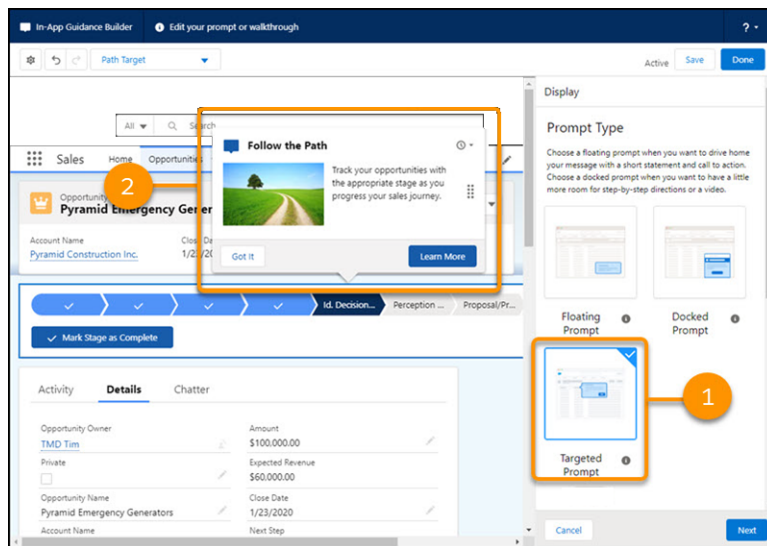
Managing your learning resources is easier than ever. Hide completed items, archive guidance sets, and check the box to mark a resource as completed without opening it. Declutter your Guidance Center view to focus on the resources you need right now.

Point to Specific Elements on a Page with Targeted Prompts (Generally Available)

Target a specific page element to show your users exactly what you’re referring to with the newest type of in-app guidance.

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

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 Prompt** 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.

Show In-App Guidance for Specific Record Types

Now, you can choose if you want in-app guidance to appear for all or only a specific record type. And you can customize your message so that users get detailed help for the unique layout and picklists of different record types. Previously, when you created in-app guidance and assigned it to a record page with multiple record types, the in-app guidance appeared for all of its record types.

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

How: From Setup in Lightning Experience, in the Quick Find box, enter *In-App Guidance*, and then select **In-App Guidance**. When you add or edit in-app guidance that has more than one record type and you want the prompt to appear only for a specific record type, select the checkbox in the Record Type area.

The screenshot shows the 'In-App Guidance' configuration page. At the top, there are 'Active', 'Save', and 'Done' buttons. The 'Display' section contains the 'Prompt Type' options: Floating Prompt, Docked Prompt, and Targeted Prompt. Below this is the 'Prompt Position' section with a dropdown menu set to 'Bottom Center'. The 'Custom Theme Color' section has a checkbox for 'Use a custom color for in-app guidance'. The 'Record Type' section is highlighted with an orange box and a callout. The callout text reads: 'Record Type. When a record has multiple record types, in-app guidance appears for all of its record types. Choose if you want the in-app guidance to appear only for this record type.' The checkbox 'Show only for type1 record type' is checked.

Create and View In-App Guidance in Setup

In-app guidance is available for supported Setup pages. View and author custom prompts and walkthroughs to enhance feature discovery and show users how to configure apps and features.

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

How: Inside the builder canvas, navigate to the gear icon, and go to the page where you want to add the prompt or walkthrough, and then click **Add**.

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 this in-app content.

Feature Area	Type	Description
Essentials	Walkthrough	Educates users on the importance of accounts and the basics of an account record. Shown in the Sales and Service apps.
	Walkthrough	Educates users on the importance of tasks and activities and how to create tasks and log a call. Shown in the Sales and Service apps.
	Walkthrough	Educates users on the importance of opportunities and how to move them forward in the pipeline. Shown in the Sales and Service apps.
Marketing	Docked prompt	Highlights tips and best practices for managing benefits.
	Docked prompt	Highlights tips and best practices for managing promotions.
	Docked prompt	Highlights tips and best practices for managing vouchers.
	Feature popover	Highlights the Pardot Setup Assistant within the Marketing Setup App. Only shown to admins.
Platform	Docked prompt	Notifies admins to add Mobile Home to a Lightning App or to the Mobile Only navigation for users to access it in their menu. Only shown to admins.
	Floating prompt	Highlights sandbox readiness materials. Only shown to admins.
	Feature popover	Encourages users to employ the global actions menu.
	Feature popover	Highlights the features of the Einstein Bots Builder. Only shown to admins.
Sales	Docked prompt	Reminds admins to enable the Einstein Conversation Insights feature, which is included for orgs that have both High Velocity Sales and Lightning Dialer. Only shown to admins.
	Docked prompt	Explains how to use Pipeline Inspection, and highlights key features.
	Floating prompt	Provides tips and best practices for using Pipeline Inspection.
	Welcome mat	Introduces users to Pipeline Inspection.
Service	Floating prompt	Introduces users to the case list view created by the Service Setup Assistant.

Feature Area	Type	Description
	Walkthrough	Introduces users to the case record page layout created by the Service Setup Assistant.
	Walkthrough	Introduces users to the default help center created by the Service Setup Assistant.
	Walkthrough	Introduces users to the Lightning email templates created by the Service Setup Assistant.
	Walkthrough	Introduces users to the default surveys created by the Service Setup Assistant.
Setup	Docked prompt	Reminds admins how to prepare their data before importing. Only shown to admins.
	Walkthrough	Highlights In-App Guidance to admins. Only shown to admins.

How: Turn off all in-app content authored by Salesforce from the In-App Guidance Setup page. Click **Settings** and then deselect **Salesforce Standard In-App Guidance**.

Explore More Resources in the Guidance Center

The Guidance Center has new sets of resources for admins setting up Multi-Factor Authentication (MFA), Field Service, and Health Cloud. Spend time learning, not searching for content, to become an expert fast. Also, customers with Premier support can see which resources are included just for them. Look for the “Premier” tag on resources.

Where: This change applies to Lightning Experience in Developer, Professional, Enterprise, Performance, and Unlimited editions. You only see applicable guidance sets for the apps installed.

Why: The Guidance Center now includes these additional sets of resources:

- **Get Ready for Multi-Factor Authentication**—Beginning February 2022, all Salesforce users must log in using MFA. Learn how to satisfy this requirement and add extra protection against security threats like phishing attacks.
- **Get Started with Health Cloud**—Explore onboarding resources to help you navigate your Health Cloud org for provider, payer, life sciences, and medical device uses.
- **Get Started with Field Service**—Find expert guidance and resources to help you implement Salesforce Field Service.

We hid the Lightning Experience welcome mat for admins because the Guidance Center is now the go-to location for admin setup and onboarding help. Admins can always access the welcome mat from the Help Menu, under Getting Started.

How: 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 the Guidance Center inside the panel, you see a list of available resource sets with descriptions.

SEE ALSO:

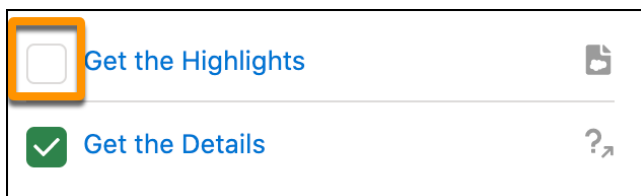
[Salesforce Help: Get Personalized Guidance While Setting Up Salesforce \(can be outdated or unavailable during release preview\)](#)

Keep Track of Resources Inside the Guidance Center

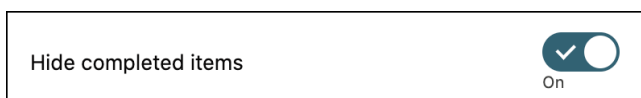
Managing your learning resources is easier than ever. Hide completed items, archive guidance sets, and check the box to mark a resource as completed without opening it. Declutter your Guidance Center view to focus on the resources you need right now.

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

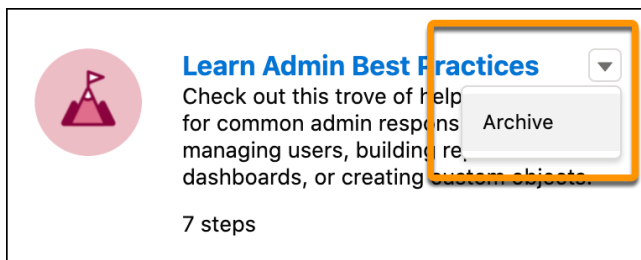
Why: Now, you can check the box near the title to mark the item as complete. In previous releases, only items you opened were marked as complete. You can also uncheck a resource to remind yourself to review it again later.



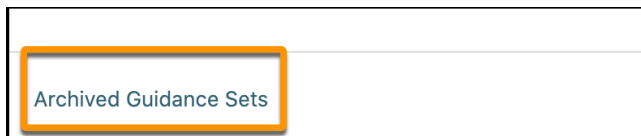
By default, we don't hide completed items. To see only the resources that you haven't yet reviewed, toggle Hide completed items to **On**.



If you're done with a guidance set for now, you can archive it, which moves it off the Guidance Center home screen to an archive section. Select **Archive** from the dropdown menu next to the set name.



You can always access the content whenever you want by clicking **Archived Guidance Sets** at the bottom of the panel. Use the dropdown menu to select **Restore an archived set**.



How: 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 the Guidance Center inside the panel, you see a list of available resource sets with descriptions.

SEE ALSO:

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

Your Account App

View and download invoices. In Salesforce Classic, the Checkout node was renamed.

IN THIS SECTION:

[View Invoices with the Your Account App](#)

Do more in the Your Account app. View and download invoices and review your payments and credit memos. No need to head over to Salesforce Checkout.

[Checkout Is Now Named Manage Subscription](#)

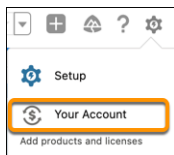
In Salesforce Classic, the Checkout node is now named Manage Subscription.

View Invoices with the Your Account App

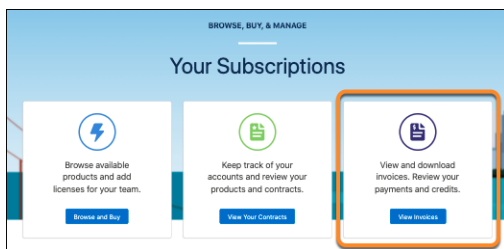
Do more in the Your Account app. View and download invoices and review your payments and credit memos. No need to head over to Salesforce Checkout.

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

How: To open the Your Account app, click **Setup** (⚙️), and select **Your Account**.



Click **View Invoices**.



To view your invoices, adjust the filters. To download an invoice, click .

To view invoice details, click the invoice number.

SEE ALSO:

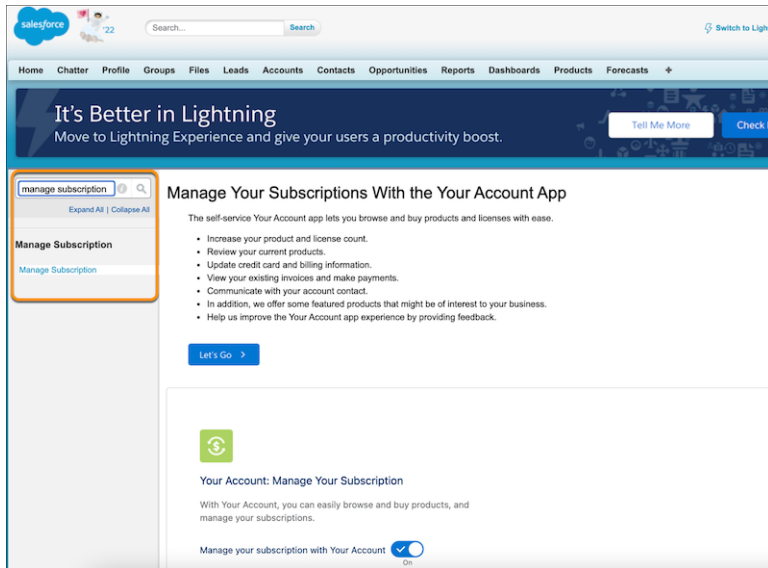
[Salesforce Help: Meet the Your Account App \(can be outdated or unavailable during release preview\)](#)

Checkout Is Now Named Manage Subscription

In Salesforce Classic, the Checkout node is now named Manage Subscription.

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

How: From Setup, in the Quick Find box, enter *Manage Subscription*, and then select **Manage Subscription**.



Salesforce Surveys

Invite more participants and generate responses by sending survey invitations from Digital Engagement channels, such as WhatsApp and Facebook, or share the URL in an SMS. Make better decisions on what actions to take by adding more context in your data maps. Create meaningful actions in your map using merge fields. Share surveys and survey invitations from the Salesforce Lightning UI to collect feedback about survey design or collaborate better on the survey results and analytics.

IN THIS SECTION:

[Engage More Customers Using Digital Engagement Channels](#)

Increase engagement and response rates with distribution channels that are more effective than email. Automatically send survey invitations after a chat over social media channels, such as WhatsApp and Facebook Messenger, or through SMS.

[Personalize Post Feedback Followup Actions](#)

Make better decisions while you create or update Salesforce records based on contextual information in a data map. Add multiple types of merge fields to your conditions or target fields, such as associated record or participant record. Use the predefined custom or org variables in your data maps. Associate timestamps while creating or updating records.

[Share Surveys with Team Members](#)

Easily share survey drafts with your team and collect feedback about the survey design. Publish and share survey results and analytics with other users. Assign access permission to individuals or a group while sharing the surveys. View the hierarchy of users who have access to the survey.

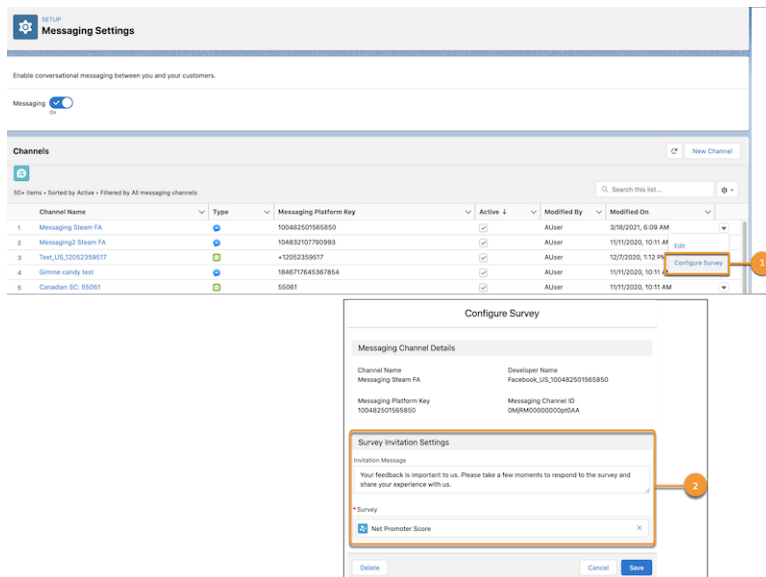
Engage More Customers Using Digital Engagement Channels

Increase engagement and response rates with distribution channels that are more effective than email. Automatically send survey invitations after a chat over social media channels, such as WhatsApp and Facebook Messenger, or through SMS.

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

Who: To send survey invitations, users need the Salesforce Surveys Advanced Features permission available with the Salesforce Feedback Management Growth and Salesforce Feedback Management Starter licenses.

How: From Setup, in the Quick Find box, enter *Messaging Settings*, and then select **Messaging Settings**.



Click **Configure Survey** (1) for a messaging channel. In the Survey Invitation Settings section (2), if needed, add a message that you want to send with the invitation, and select a survey to send in the Survey field.

Personalize Post Feedback Followup Actions

Make better decisions while you create or update Salesforce records based on contextual information in a data map. Add multiple types of merge fields to your conditions or target fields, such as associated record or participant record. Use the predefined custom or org variables in your data maps. Associate timestamps while creating or updating records.

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

Who: To use merge fields and data maps, users need the Salesforce Surveys Advanced Features permission available with the Salesforce Feedback Management Growth and Salesforce Feedback Management Starter licenses.

Why: Derive actions using the contextual information. For example, if the response to a Net Promoter Score survey of each participant of a high-value account is less than 5, create a case with an escalated status.

How: In Survey Builder, create or update the data map for a survey.

- Manage conditions (1) based on the merge fields.
- Map target fields (2) to the merge fields, and then create meaningful actions based on the contextual information.
- Associate the target fields (3) with the record-creation or -updatation timestamp.

Share Surveys with Team Members

Easily share survey drafts with your team and collect feedback about the survey design. Publish and share survey results and analytics with other users. Assign access permission to individuals or a group while sharing the surveys. View the hierarchy of users who have access to the survey.

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

How: Open a survey that you want to share in the Lightning Experience UI.

To share the survey with an individual or a group, and grant access permissions, click **Sharing** (1). To view the list of users who have access to the survey and to view the user's access levels, click **Sharing Hierarchy** (2).

Salesforce Scheduler

Allocate appointments evenly among service resources with resource-utilization-based appointment distribution. Use Apex methods to quickly create and update service appointments. Make more API calls with the increased per user, per hour Connect API request limit. And check out the new *Salesforce Scheduler Developer Guide* and the improved, standalone Salesforce Scheduler Help supplemented with flow variable documentation.

IN THIS SECTION:

[Optimize Resource Utilization with Even Appointment Distribution](#)

Use the new data-driven appointment distribution to quickly and evenly allocate appointments to service resources. Salesforce Scheduler uses load-balancing logic to find and suggest the least-occupied eligible service resources for appointments. For an anonymous appointment, the least occupied eligible resource is automatically assigned to the appointment.

[Create and Update Appointments Through New Apex Methods](#)

Salesforce Scheduler developers can now easily create and update appointments without prerequisites such as remote site settings for using APIs. The new Apex methods use POST and PATCH requests on the Service Appointments Connect API to create and update appointments.

[Other Changes to Salesforce Scheduler](#)

Learn about other small but important improvements to Salesforce Scheduler.

[Make the Most of the Improved Salesforce Scheduler Documentation](#)

Check out the new [Salesforce Scheduler Developer Guide](#) that brings all Salesforce Scheduler developer resources to one place. The Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs topic shows how to use the Salesforce Scheduler APIs to build a custom scheduling app. You can use the app to schedule and modify appointments including anonymous and multi-resource appointments. For easy access and navigation, we moved the Salesforce Scheduler help topics from the *Extend Salesforce with Clicks, Not Code* guide to a standalone [Salesforce Scheduler Help](#). And, we added useful information about flow screen component attributes to the help.

Optimize Resource Utilization with Even Appointment Distribution

Use the new data-driven appointment distribution to quickly and evenly allocate appointments to service resources. Salesforce Scheduler uses load-balancing logic to find and suggest the least-occupied eligible service resources for appointments. For an anonymous appointment, the least occupied eligible resource is automatically assigned to the appointment.

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

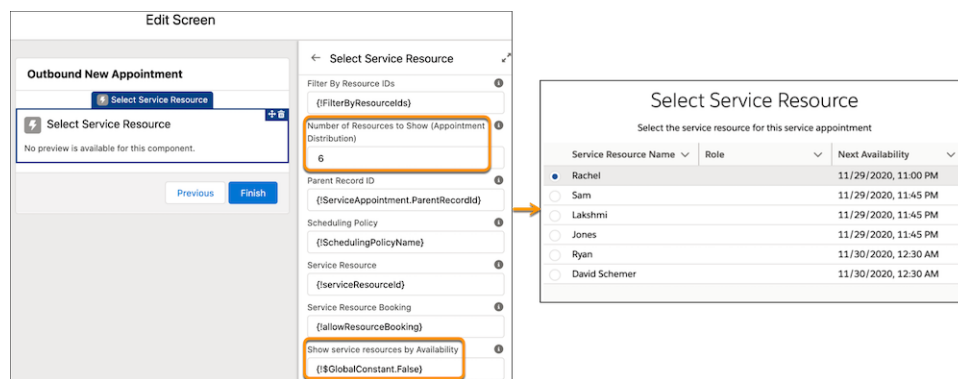
Why: Appointment distribution helps you quickly find the right resources for appointments. And an equitable distribution of appointments ensures efficient use of service resources and increased productivity. To enhance the scheduling experience for users when appointment distribution is enabled, you can:

- Optimize the performance by defining the maximum number of eligible resources you want to show for scheduling. Scheduling is a performance-intensive process. As the number of eligible resources increases, Salesforce scheduler takes longer to fetch the resource list.

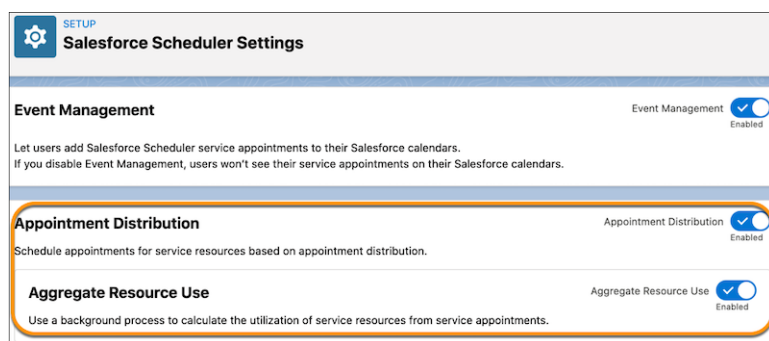
Use the new Number of Resources to Show (Appointment Distribution) attribute in flows. This attribute is available in the Select Service Resource, Select Service Appointment Time, and Select Service Resource and Service Appointment Time screen components. If you're using APIs, use the `resourceLimitApptDistribution` parameter. This parameter is available in the `getAppointmentCandidates` REST API and the `available-territory-slots` Connect API.

- List service resources based on their workload, with the least occupied resource at the top.

Set the new Show Service Resources by Availability attribute to `False`. This attribute is available in the Select Service Resource and Select Service Resource and Service Appointment Time screen components. By default, it's set to `True` and sorts resources by the earliest next availability date and time.



How: Define an appointment assignment policy to calculate resource utilization, and then link the assignment policy to your scheduling policy. To start resource utilization calculation, on the Salesforce Scheduler Settings page, enable **Appointment Distribution**, and then **Aggregate Resource Use**.



Note: Resource utilization calculation is a resource-intensive and time-consuming process. A separate setting to control utilization calculation enables you to turn it off whenever other assignment methods become available in the future.

SEE ALSO:

[Salesforce Scheduler Help: Appointment Distribution \(can be outdated or unavailable during release preview\)](#)

Create and Update Appointments Through New Apex Methods

Salesforce Scheduler developers can now easily create and update appointments without prerequisites such as remote site settings for using APIs. The new Apex methods use POST and PATCH requests on the Service Appointments Connect API to create and update appointments.

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

SEE ALSO:

[Salesforce Scheduler Developer Guide: LightningScheduler Class \(can be outdated or unavailable during release preview\)](#)

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

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

Why: We added more resources for Salesforce Scheduler developers.

Track requests from external systems using correlation ID

Use the new `correlationId` parameter in the `getAppointmentCandidates` and `getAppointmentSlots` REST APIs and the `available-territory-slots` Connect API to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or external system that calls the `ServiceResourceScheduleHandler` interface implementation. If you don't pass a custom value, a random identifier is passed. The Correlation ID attribute is also available in the Select Service Resource and Select Service Appointment Time screen components in Salesforce Scheduler flows.

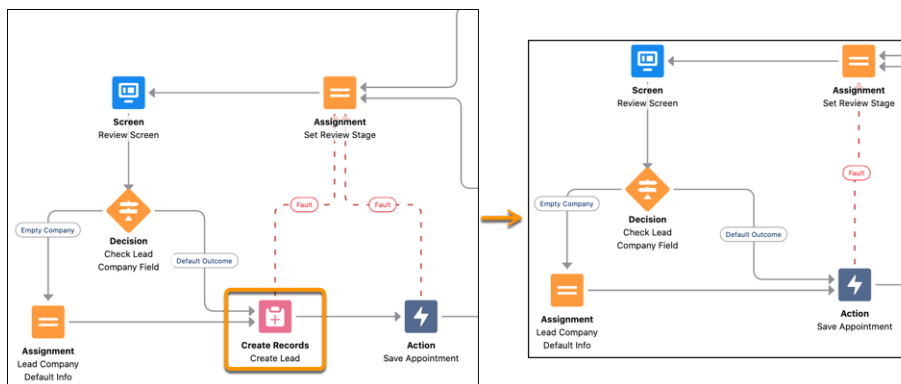
Make more API calls with the increased Connect API request limit

We increased the maximum number of per user, per hour requests to the Salesforce Scheduler Connect APIs to 10,000. With the increased request limit, Salesforce Scheduler Connect APIs are better equipped to handle large number of requests. For example, if you use APIs for guest user appointments, the number of incoming requests from the integration user can be large.

Make the most of the optimized Inbound New Guest Appointment flow

We optimized the Save Appointment action in the Inbound New Guest Appointment flow. The flow now works with the `ServiceResourceScheduleHandler` Apex interface implementation. You can now check external calendars for availability of service resources for guest user appointments.

Edit the Inbound New Guest Appointment flow in Flow Builder. Delete the Create Lead node, and then connect the Decision and Assignment nodes directly to the Save Appointment action node. Passing the Lead object, instead of lead records, to the Save Appointment action node ensures a complete rollback when something goes wrong during the guest appointment scheduling process. Previously, the appointment record was rolled back, but the lead record that was created during the process remained in the system, resulting in duplicate leads.



Enjoy granular flow security in Experience Cloud sites

In new orgs beginning in Winter '22, you can't grant the Run Flows permission to guest users in Experience Cloud sites. Instead, you can grant them access to specific flows by enabling restricted access for those flows and then adding them to the guest user profile.

SEE ALSO:

[Changed Connect REST API Request Bodies](#)

[Salesforce Scheduler Developer Guide: Salesforce Scheduler Business APIs \(can be outdated or unavailable during release preview\)](#)

Make the Most of the Improved Salesforce Scheduler Documentation

Check out the new [Salesforce Scheduler Developer Guide](#) that brings all Salesforce Scheduler developer resources to one place. The Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs topic shows how to use the Salesforce Scheduler APIs to build a custom scheduling app. You can use the app to schedule and modify appointments including anonymous and multi-resource appointments. For easy access and navigation, we moved the Salesforce Scheduler help topics from the *Extend Salesforce with Clicks, Not Code* guide to a standalone [Salesforce Scheduler Help](#). And, we added useful information about flow screen component attributes to the help.

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

Search

Search brings intelligence and efficiency to users who are looking for relevant information in their Salesforce org. Users in Lightning Experience get the added benefits of AI-powered Einstein Search. The more users engage with Einstein Search, the more likely Einstein returns the most useful search results.

IN THIS SECTION:

[Einstein Search](#)

All features of Einstein Search are now on by default at no extra cost. Users gain a smarter search without giving up search features that they rely on. Einstein Search delivers three main features. Personalization returns relevant search results based on a user's activity. Natural language search 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](#)

The following objects are now searchable.

Einstein Search

All features of Einstein Search are now on by default at no extra cost. Users gain a smarter search without giving up search features that they rely on. Einstein Search delivers three main features. Personalization returns relevant search results based on a user's activity. Natural language search 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.

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IN THIS SECTION:

[Welcome to Einstein Search: Now On by Default](#)

Einstein Search is at your service. It's enabled by default at no extra cost. Users can search just like they're used to. Nothing's going away with Einstein Search, but search is getting smarter. Einstein Search adds personalized search results, record previews from the search box, and natural language searches.

[Help Einstein Search Find the Right Results for Different Users \(Beta\)](#)

Influence the instant and top search results that are returned for new and existing user profiles. For each user profile, select objects that you always want Einstein Search to look at. When Einstein Search looks for records, it determines relevance based on a user's past activity and the objects that you select.

[Assist Your Agents and Customers to Find Knowledge Articles \(Pilot\)](#)

Einstein Search for Knowledge is now powered by AI to get service agents and customers the most relevant knowledge articles. Try it by signing up for the [Einstein Search for Knowledge pilot](#).

SEE ALSO:

[Einstein Release Notes](#)

Welcome to Einstein Search: Now On by Default

Einstein Search is at your service. It's enabled by default at no extra cost. Users can search just like they're used to. Nothing's going away with Einstein Search, but search is getting smarter. Einstein Search adds personalized search results, record previews from the search box, and natural language searches.

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



Note: Einstein Search uses global predictive models to provide meaningful search results. For more information, review [Einstein Global Models and Data Usage](#).

SEE ALSO:

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

Help Einstein Search Find the Right Results for Different Users (Beta)


Influence the instant and top search results that are returned for new and existing user profiles. For each user profile, select objects that you always want Einstein Search to look at. When Einstein Search looks for records, it determines relevance based on a user's past activity and the objects that you select.

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

How: From Setup, in the Quick Find box, enter *Einstein Search*, and select **Search Results Objects (Beta)**. From this page, assign objects to different user profiles, or use the default search profile.


SETUP
Search Results Objects (Beta)

Select the objects that you want Einstein to search. The objects you select and the Einstein-determined objects form a user's search results. Einstein-determined objects are included by default, and are based on a user's activity. We don't list the specific objects. [Tell Me More](#)

Note: Org and user permissions can prevent your selected objects from being included in search results.

Assign Search Objects
17 Items • Sorted by User Profile

User Profile	Assigned Objects	
Default Search Profile	Einstein-determined objects, Accounts	
Analytics Cloud Integration User	Default Search Profile objects	
Analytics Cloud Security User	Default Search Profile objects	
Chatter External User	Default Search Profile objects	

SEE ALSO:

[Salesforce Help: Select Objects for Different User's Search Results \(Beta\)](#) (can be outdated or unavailable during release preview)

Assist Your Agents and Customers to Find Knowledge Articles (Pilot)

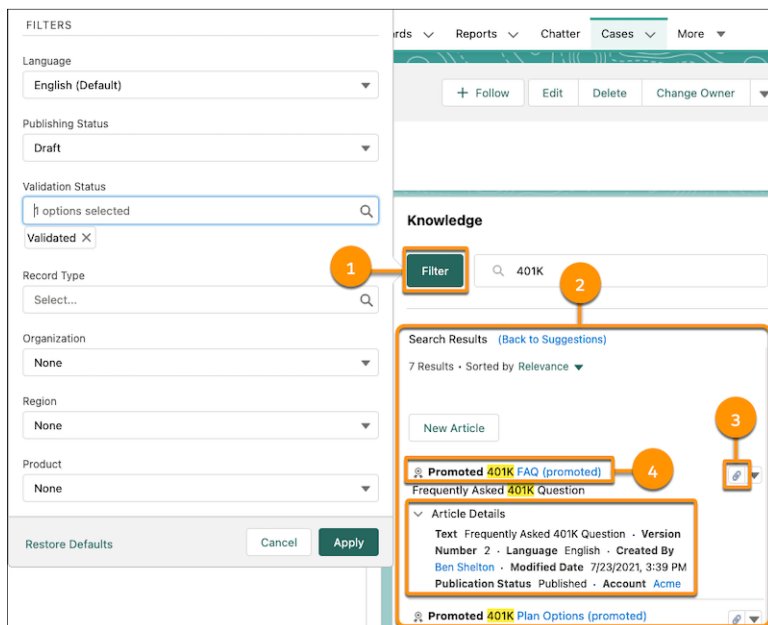
Einstein Search for Knowledge is now powered by AI to get service agents and customers the most relevant knowledge articles. Try it by signing up for the [Einstein Search for Knowledge pilot](#).

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



Note: This feature isn't 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.

Why: So what's in the pilot? AI-driven search results that are fine-tuned to each user's work and reflect the popularity of the articles.



- Search filters in the Knowledge sidebar that are easier to find, modify, and apply when viewing results. And you can reposition the Filter button on either side of the search box (1).
- User-profile-based knowledge search results appear in a card view in the sidebar and global search box. Users see article details, snippets, and highlighted search terms (2).
- A button to attach an article to a record with one click (3).
- Clearly labeled articles promoted by content managers. (4).

Get Search Results for More Objects

The following objects are now searchable.

Where: These changes apply to Lightning Experience and all versions of the Salesforce mobile app. Availability in Salesforce Classic is noted in the table.

Object	Product Area	Found In
Budget	Nonprofit Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Budget Allocation	Nonprofit Cloud	Enterprise, Unlimited, and Developer editions in Lightning Experience
Business Brand	Platform Services Cloud	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience and Salesforce Classic
Change Request	Service Cloud	Enterprise, Performance, Unlimited, Professional, and Developer editions in Lightning Experience

Object	Product Area	Found In
Customer	Platform Services Cloud	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience and Salesforce Classic
Financial Deal Interaction	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Fincl Deal Interaction Summary	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Gnrc Vst Key Performance Ind	Consumer Goods Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Incident	Service Cloud	Enterprise, Performance, Unlimited, Professional, and Developer editions in Lightning Experience
Interaction Sum Discussed Account	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Loyalty Pgm Group Mbr Rlnsp	Loyalty Management Cloud	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Marketing App Extension	Pardot	All editions of Pardot in Lightning Experience
Multiparty Info Auth Request	Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Object State Definition	Insurance for Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Object State Transition	Insurance for Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Object State Value	Insurance for Financial Services Cloud	Enterprise, Professional, and Unlimited editions in Lightning Experience
Omni Data Pack	Vlocity	Enterprise, Unlimited, and Developer editions in Lightning Experience
Problem	Service Cloud	Enterprise, Performance, Unlimited, Professional, and Developer editions in Lightning Experience
Promotion Segment	Commerce Cloud (B2B Commerce)	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience
Provider Network Contract	Health Cloud	Enterprise and Unlimited editions in Lightning Experience where Health Cloud is enabled.

Object	Product Area	Found In
Provider Network Tier	Health Cloud	Enterprise and Unlimited editions in Lightning Experience where Health Cloud is enabled.
Seller	Platform Services Cloud	Enterprise, Performance, Unlimited, and Developer editions in Lightning Experience and Salesforce Classic
Voice Call	Service Cloud Voice	Performance, Enterprise, and Unlimited Editions in Lightning Experience

SEE ALSO:

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

[Salesforce Help: Searchable Fields by Object in Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

Analytics

Get unified sales and service data with a new Customer Insights app, make your modeling more accurate with improved validations, and find insights faster with a redesigned search experience.

IN THIS SECTION:

[Reports and Dashboards](#)

Stay on top of changing business goals, data, and performance. Your dashboard's gauge charts can now adjust dynamically as your business evolves. With more field types for inline editing you can now update more data without leaving the report run page. You get to focus on your current tasks while saving time and clicks.

[Tableau CRM](#)

Track your auto-installed Tableau CRM app usage on a redesigned setup page. Try the new Customer Insights app with unified sales and service data. Manage mobile layouts more easily when you build dashboards. Evaluate how your models perform with new validations in Einstein Discovery. Find insights in new ways with natural language search and more (Beta).

Reports and Dashboards

Stay on top of changing business goals, data, and performance. Your dashboard's gauge charts can now adjust dynamically as your business evolves. With more field types for inline editing you can now update more data without leaving the report run page. You get to focus on your current tasks while saving time and clicks.

IN THIS SECTION:

[Automatically Tune Your Dashboards to Your Business Goals with Dynamic Gauge Charts \(Beta\)](#)

Dashboard gauge charts are awesome to track your performance and business goals, but your business is always changing. With dynamic gauge charts, you're no longer tied to static goals or performance levels. Build your gauge chart using report metrics and field values that respond dynamically to your business. For example, a gauge chart can show how a subsidiary's sales are doing relative to your overall business.

[Update More Fields from the Report Run Page with Expanded Inline Editing \(Beta\)](#)

Update your reports more efficiently without losing your place by clicking back and forth. Inline editing is now supported for date, picklist, and lookup fields. When your report data gets out of date, you can edit it right on the report run page. For example, sales reps can update opportunity statuses directly from their pipeline reports. Previously, inline editing was supported only for text and numeric fields.

Automatically Tune Your Dashboards to Your Business Goals with Dynamic Gauge Charts (Beta)

Dashboard gauge charts are awesome to track your performance and business goals, but your business is always changing. With dynamic gauge charts, you're no longer tied to static goals or performance levels. Build your gauge chart using report metrics and field values that respond dynamically to your business. For example, a gauge chart can show how a subsidiary's sales are doing relative to your overall business.

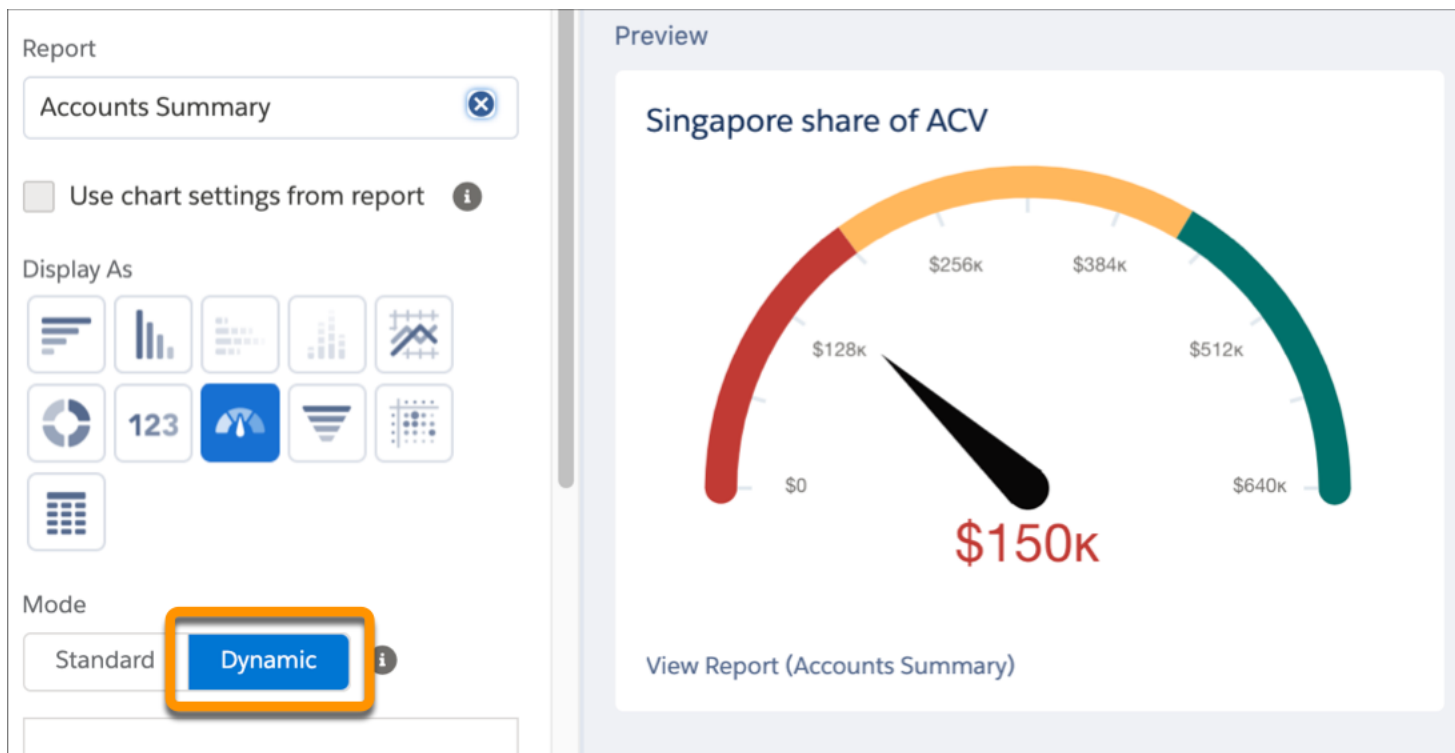
Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.



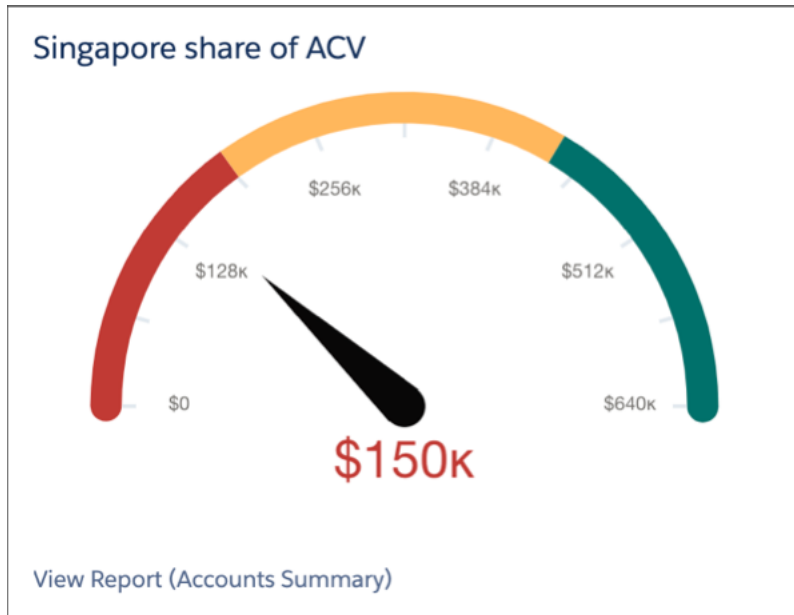
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

How: Start by enabling dynamic gauge charts. From Setup, in the Quick Find box, enter **Reports and Dashboards**, and then select **Reports and Dashboards Settings**. Select **Enable Dashboard Dynamic Gauge Charts (Lightning Experience only)**, and save your changes. Next, make sure that your source report is set up for the data that you want to chart. Now, pop over to the dashboard builder for your new or existing dashboard and add the gauge chart component 📊.

In Standard mode, you can create a gauge chart with fixed values as you usually do. In Dynamic mode, you have dynamic control over the chart measure, indicated by the pointer, and the chart target, or maximum value in the chart.



For example, this chart measure is the annual contract value (ACV) for a company's Singapore subsidiary (\$150k). This value is taken from the source Account report, which was filtered to show only the data for the Singapore subsidiary. The chart target is the ACV for the overall business (\$640k), which is taken from the ACV field on the Account record for the parent company. To be in the green (excellent) range, the subsidiary must account for at least 50% of the company's total ACV. The actual performance is in the red zone, so the team in Singapore has work to do. Because the chart is dynamic, any improvements in the Singapore team's performance are automatically reflected in the chart.



For successful dynamic gauge charts, keep these points in mind:

- Your source reports must be set up with the groupings, metrics, and filters that you want to reflect in the gauge charts.
- The target segment values for a dynamic gauge chart are always percentages. (For standard gauge charts, the segment ranges are fixed numeric values.)


SEE ALSO:

[Salesforce Help: Dynamic Gauge Charts in Lightning Experience Dashboards \(Beta\)](#) (can be outdated or unavailable during release preview)

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

Update your reports more efficiently without losing your place by clicking back and forth. Inline editing is now supported for date, picklist, and lookup fields. When your report data gets out of date, you can edit it right on the report run page. For example, sales reps can update opportunity statuses directly from their pipeline reports. Previously, inline editing was supported only for text and numeric fields.

Where: These changes apply to Lightning Experience in Group, Essentials, Professional, 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](#).

How: From Setup, in the Quick Find box, enter *Reports and Dashboards*, and then select **Reports and Dashboards Settings**. Select **Enable Inline Editing in Reports (Lightning Experience only)**, and save your changes.

Now open a report and hover over the field that you want to edit. If you see a pencil icon, click it, modify the value, and save. The field value is updated on the report and in the source record, and the report reruns automatically.

	Opportunity Name ▾	Stage ↑ ▾	Amount ▾	Expected Revenue
1	Pyramid Emergency Generators	Prospecting	-	
2	Dickenson Mobile Generators	Qualification		\$
3	Grand Hotels Kitchen Generator	Needs Analysis		\$
4	United Oil Plant Standby Generators	Needs Analysis		\$
5	Oppty Owner Polymorphic	Needs Analysis	-	

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

Case Last Modified By ▾	Subject
Admin User	Starting generator after electrical failure
Admin User	Performance inadequate for second co

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

- Task and event object fields
- Owner fields
- System fields, such as Record ID and Created Date
- Compound fields, including name and address fields
- Encrypted text fields
- Formula fields
- Polymorphic fields
- Standard fields of type auto number, rollup summary, record type, master-detail, long text area, rich text, and hierarchy
- Fields in a Salesforce object that doesn't have a record type

Other factors also determine whether inline editing is supported for a field:

- Object permissions: The user's profile must include edit access to the object that the column is coming from.
- Field Level Security: The user's profile must include edit access to the field that the column is associated with.
- Page Layout: The page layout associated with the object and the user's profile must include the field, and the field can't be marked read-only.

Tableau CRM

Track your auto-installed Tableau CRM app usage on a redesigned setup page. Try the new Customer Insights app with unified sales and service data. Manage mobile layouts more easily when you build dashboards. Evaluate how your models perform with new validations in Einstein Discovery. Find insights in new ways with natural language search and more (Beta).

IN THIS SECTION:

[Analytics Data Integration](#)

Build bigger recipes with tools for moving and viewing hundreds of nodes simultaneously. Control the data in recipes with Boolean filter logic, and roll up your hierarchical data for analysis.

[Analytics Prebuilt Templates and Apps](#)

The new Customer Insights app brings together Sales and Service analytics and provides a new architecture that makes it a snap to customize dashboards. Automatically install apps, starting with the Customer Insights app. Try the new Analytics for Corporate and Investment Banking app to get insights on your commercial and investment banking deals.

[Analytics App Building](#)

Create dashboard layouts more easily for desktop and mobile users, and add custom visualizations to dashboard charts. Skip the data prep and explore Salesforce CDP data with Tableau CRM. Bring your Snowflake data into Tableau CRM templates using live datasets.

[Einstein Discovery](#)

Operationalize externally built models that you easily upload and deploy into Salesforce. Translate unstructured data into valuable insights with sentiment analysis. Get predictive and prescriptive intelligence directly in your automated business processes.

[Salesforce Data Pipelines](#)

Build connections to sync pipeline data more easily.

[Tableau CRM for Everyone](#)

New search pages on Tableau CRM Home provide options for exploration to help you find insights faster. With intelligent, self-service analytics, Ask Data for Salesforce (beta) guides you in answering your data questions.

[Analytics Mobile Apps](#)

Access insights without internet in Tableau CRM for iOS (now generally available). Organize your favorite insights with Collections in both Tableau CRM for iOS and Android. Plus, work faster with one-click actions in Tableau CRM for iOS, and see images in tables in Tableau CRM for Android.

Analytics Data Integration

Build bigger recipes with tools for moving and viewing hundreds of nodes simultaneously. Control the data in recipes with Boolean filter logic, and roll up your hierarchical data for analysis.

IN THIS SECTION:

[Audit Usage Statistics for Auto-Installed Apps](#)

Want to see how your apps impact org limits for API calls and dataset row storage? Now you can monitor your Auto-Installed Tableau CRM apps from the Auto-Installed Apps Setup page. Track each app's average API calls per hour and the number of dataset rows used per day.

[Be a Connector Trailblazer with New and Improved Connector Versions](#)

It's time to make the switch. The remote connectors that you use to sync data to Tableau CRM have new versions. Customers new to Tableau CRM after August 1, 2021 use only the new connector versions, while customers prior to August 1 can choose when to upgrade. If you choose to be an early adopter, you can switch over to the new connector versions and try them out now. During the Spring '22 release, we plan to auto-switch customers to the new connector version when it reaches or exceeds the level of functionality and performance of the legacy connector version. We plan to finish the auto-switching during the Summer '22 release.

[Output Your Tableau CRM Data to Amazon S3 \(Generally Available\)](#)

Output connectors now let you push your data from Tableau CRM into Amazon S3 when you use Data Prep. You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep, datasets are liberated from Tableau CRM and written as one or more .csv files for you to improve your overall business processes with better data. For example, output processed and transformed customer service data for individual agents to understand what they could be doing to improve customer satisfaction.

[Access Salesforce Data Without Data Sync Using Direct Data for Recipes \(Generally Available\)](#)

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

Supersize Recipe Creation

We added features to speed up data prep in large recipes. Now you can auto-hide unused columns and temporarily disable data preview for faster page loads. You can also select multiple nodes to delete them as a group, clearing up space for more recipe building.

Navigate Data Prep with Accessible Keyboard Shortcuts

Recipe building in data prep is now accessible to more users thanks to keyboard navigation. You can navigate between nodes and the menu, undo and redo actions, and even add input data, all through keystrokes.

Filter Smarter with Custom Filter Logic

Get more granular with data prep recipe filters to include only the rows you want. Define custom filter logic with parentheses and the AND, OR, and NOT Boolean operators, such as (1 AND 2) OR 3. Previously, you filtered data that met all specified conditions. For example, now you can focus on accounts with contracts expiring this year that are currently high value, or low value but with many employees.

Bucket Smarter with Fuzzy Match for Data Prep Bucketing

You can now use typographic fuzzy matching in your Data Prep recipe buckets to automatically handle spelling variations. Spelling differences in dimension data can split rows into separate buckets when they really belong in the same bucket. Differences in capitalization, pluralization, abbreviations, and regional variations such as behavior and behaviour create ambiguity about how to group the data. If you enable fuzzy matching on a text column, Einstein ignores capitalization so that variations such as flavor, Flavor, flavour, and flavors all can belong in the same bucket.

Guide the Optimal Number of Clusters

Identifying hidden relationships across big data using cluster analysis is easier with more options to find the optimal number of cluster transformation groupings. You can now define the number of clusters, allow the clustering algorithm to determine the optimal number, or guide the algorithm with a base cluster number. For example, guide the cluster transformation to use the optimum cluster number from a base of 10. The algorithm evaluates all options 25% above and below your base, so 7–13, to find the best data organization where data groupings are most like each other. Previously, you set the number of clusters, so you manually ran the cluster transformation and evaluated data grouping alikeness for each cluster count from 7 to 13. You can also compare between differently scaled data more easily by rescaling each column's data values from 0 through 1.

Get Unselected Values Included in Pivot Output

Leave no data behind when you pivot. Your values that aren't picked are now automatically included in a column labeled Other when you pivot with the Data Prep aggregate node. For example, you can group columns by opportunity type, select your most important types, and let the rest be grouped in the Other column. Previously, these rows were dropped from the output.

Reference Aggregation Results with Ease

Data Prep recipe aggregation results now automatically generate more meaningful column names for pivot groups for use in your data prep, explorations, and visualizations. For example, in a row count aggregate with a column grouping for escalation, the column is now named `Rows by TRUE` with an API name of `COUNT_Rows_TRUE`. Previously, the column was named `TRUE_Rows` with an API name of `Escalated_[#]`.

Roll Up Hierarchical Data

Data Prep recipes have leveled up to handle your multilevel data. You can now apply aggregation to your hierarchical data to sum values at each level of the relationship, instead of calculating manually. For example, you can roll up revenues, assets, or liabilities for companies and their subsidiaries. Or, you can roll salesperson data up the management chain to see aggregates by team, region, area, and beyond. You can also apply percentage splits to allocate portions to different parents such as commission among members of the sales team.

Output Fully Qualified Names in .csv Headers

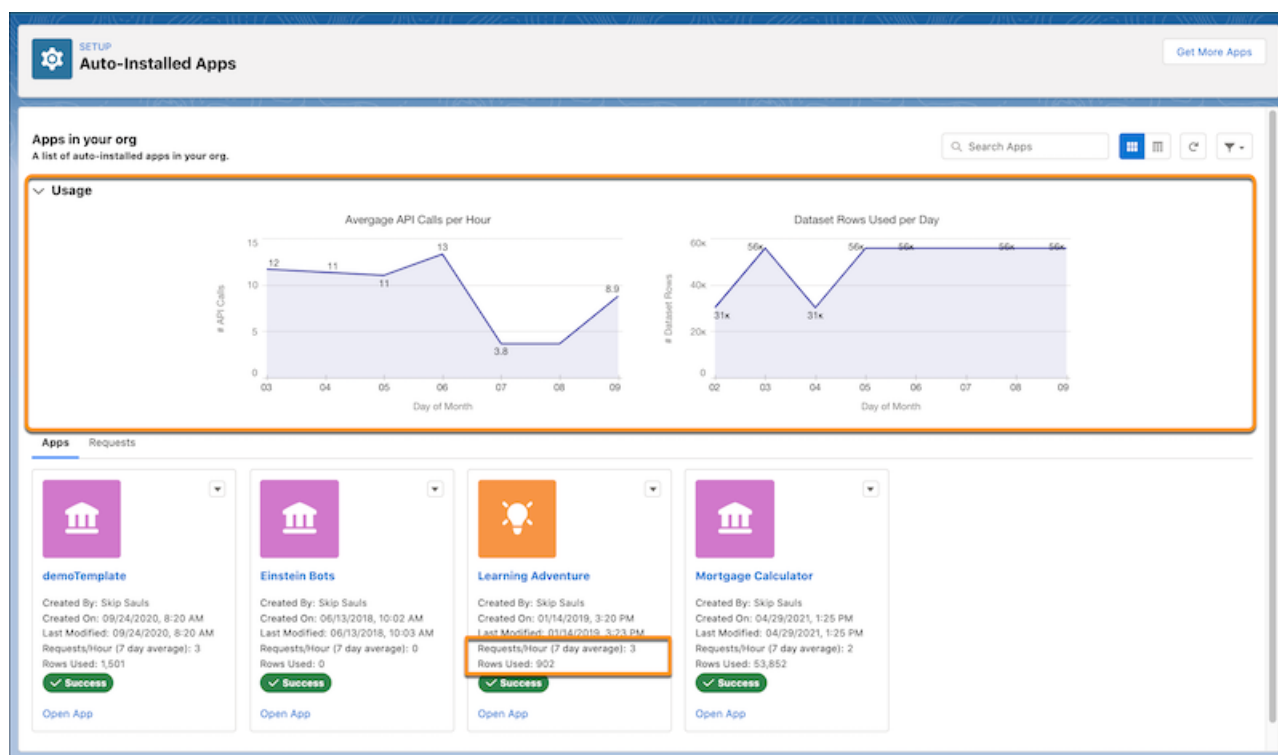
Interpreting the output .csv from a Tableau CRM recipe is easier with the option to include a column's fully qualified name in the .csv header. The fully qualified name has more information about the source object to help you understand the data lineage, usually in the format [ObjectName].[APIName]. For example, the .csv header uses the fully qualified name Account.BillingCity instead of the column label BillingCity. Previously, only the column label was included in the .csv header, which made interpretation challenging if there were duplicate or similar column labels.

Audit Usage Statistics for Auto-Installed Apps

Want to see how your apps impact org limits for API calls and dataset row storage? Now you can monitor your Auto-Installed Tableau CRM apps from the Auto-Installed Apps Setup page. Track each app's average API calls per hour and the number of dataset rows used per day.

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: From Setup, in the Quick Find box, enter *Auto-Installed Apps*, and then select **Auto-Installed Apps**. Usage statistics for all embedded apps in the org are visible on the main page.



To view individual app usage statistics as charts, select an app and then click the **Usage** tab.

SEE ALSO:

[Salesforce Help: Monitor, Update, and Delete Auto-Installed Apps](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Tableau CRM Limits](#) (can be outdated or unavailable during release preview)

Be a Connector Trailblazer with New and Improved Connector Versions

It's time to make the switch. The remote connectors that you use to sync data to Tableau CRM have new versions. Customers new to Tableau CRM after August 1, 2021 use only the new connector versions, while customers prior to August 1 can choose when to upgrade. If you choose to be an early adopter, you can switch over to the new connector versions and try them out now. During the Spring '22 release, we plan to auto-switch customers to the new connector version when it reaches or exceeds the level of functionality and performance of the legacy connector version. We plan to finish the auto-switching during the Summer '22 release.

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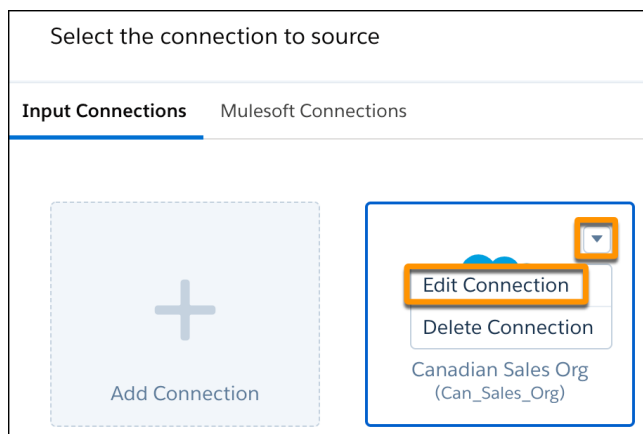
Why: We're constantly working to improve connectors, and these new connector versions give us the framework to make changes more easily. Many of the new connector versions are already faster or have more options.

How: Your existing connections created with one of these connectors stay on the legacy version until you upgrade using the connector's legacy toggle.

Connector	Notes
Amazon Redshift Connector	The new version doesn't use Amazon S3. The Master Symmetric Key, AWS Secret Access Key, AWS Access Key ID, and S3 Bucket Name settings aren't used. The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
Amazon S3 Connector	The new 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	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS Aurora PostgreSQL Connector	The new version supports unsigned INT and unsigned BIGINT fields. The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
AWS RDS MariaDB Connector	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS MySQL Connector	The new version supports unsigned INT and unsigned BIGINT fields. The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
AWS RDS PostgreSQL Connector	The new version supports unsigned INT and unsigned BIGINT fields. The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
AWS RDS SQL Server Connector	The new version supports unsigned INT and unsigned BIGINT fields.
Google BigQuery Legacy SQL Connector	BigQuery Storage Read API is now supported, which can increase throughput. Set the new version's Use Storage API property to true to use BigQuery Storage API. The new version doesn't use the staging environment.

Connector	Notes
Google BigQuery Standard SQL Connector	BigQuery Storage Read API is now supported, which can increase throughput. Set the new version's Use Storage API property to true to use BigQuery Storage API. The new version doesn't use the staging environment.
Heroku Postgres Connector	The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
Microsoft Azure SQL Database Connector	The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
Microsoft Synapse Analytics Connector	The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
NetSuite Connector	The new version names objects differently than the legacy version. Update your recipes and dataflows with the new object names after upgrading.
Salesforce External Connector	
Salesforce Marketing Cloud Contacts OAuth 2.0 Connector	<ul style="list-style-type: none"> The new version makes more Marketing Cloud data accessible through expanded Data Extension support. The new version names objects differently than the legacy version. Update your recipes and dataflows with the new object names after upgrading. Data extensions won't be impacted. The new version names some fields differently than the legacy version. Data extensions won't be impacted. Top-level and child business unit MID information is now available in the object names using the format ChildObjectName_childMID. We also show the current business unit's Data Extensions with and without a MID suffix, with identical data for both. Enable the connector property Display Child Data Extensions to view this information. The new connector version shows Boolean values as "true" or "false" instead of 0 or 1. This release note will be updated when Boolean values show as 0 or 1 again.
Snowflake Connector	The new version supports key pair authentication.
Zendesk Connector	

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



Deselect **Use legacy connector**.



Save and validate the connector, and then test your connection. When you create a connection from this group, we recommend that you use the new connector version to avoid another upgrade in the future. If your tests with the new version aren't successful, reselect **Use legacy connector**.



Your existing connections created with one of these connectors stay on the legacy version until you manually migrate to the new version.

Connector	Notes
Google Analytics Core Reporting v4 Connector	The new version supports custom objects. Using core reporting API v4.0 provides additional Google Analytics options.
Marketo Connector	There are two connector options, Marketo Connector and Marketo Legacy Connector, that reflect the new or legacy version. These connectors don't use the legacy connector toggle. The new connector version supports filtering on select objects.
Oracle Eloqua Connector	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	There are two connector options, SAP HANA Cloud Connector and SAP HANA Connector, reflecting the new or legacy version. These connectors don'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. When you create a connection from the manually migrated group, it always uses the new version.

SEE ALSO:

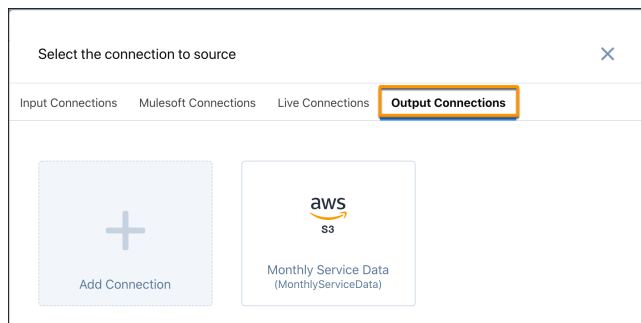
[Salesforce Help: New Connector Version Upgrades and Considerations \(can be outdated or unavailable during release preview\)](#)

Output Your Tableau CRM Data to Amazon S3 (Generally Available)

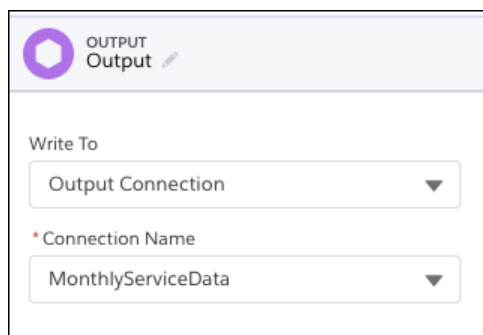
Output connectors now let you push your data from Tableau CRM into Amazon S3 when you use Data Prep. You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep, datasets are liberated from Tableau CRM and written as one or more .csv files for you to improve your overall business processes with better data. For example, output processed and transformed customer service data for individual agents to understand what they could be doing to improve customer satisfaction.

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 Setup, under Analytics, enable the Amazon S3 output connection. Then, create the output connection to Amazon S3 from the Connect section of the Tableau CRM Data Manager, using the Output Connections tab.



Build out your Data Prep recipe and add an Output node. Select to write to the Output connection and choose the Amazon S3 connection name. In this example, the dataset is saved to the MonthlyServiceData Amazon S3 connection.



Save the recipe. When the recipe runs, Tableau CRM creates a folder in the directory you chose when you created the connection, with a name based on the folder path. For example, if you chose the folder path `...support/servicedata`, a new folder `servicedata` is created at the path `...support/servicedata/servicedata`. The new folder contains the recipe outcome file

servicedata_0.csv, a *schema.json* metadata file, and a *_SUCCESS* file. When you run the recipe again, the files previously generated are deleted and the new version of the files are written.

SEE ALSO:

Salesforce Help: Amazon S3 Output Connection (can be outdated or unavailable during release preview)

Access Salesforce Data Without Data Sync Using Direct Data for Recipes (Generally Available)

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

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


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




3 options selected

Datasets

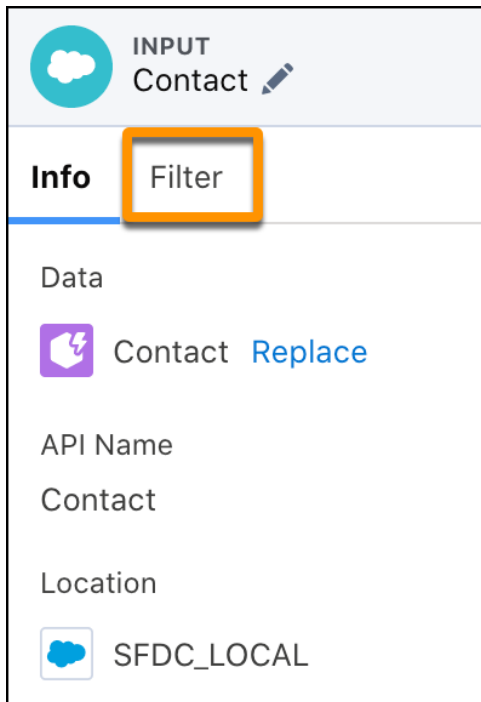
☒ Connected Objects
 ☒ Direct Data

Objects

	Fred Williamson	Nov 20, 202...	Fred William...	Nov 20, 202...
	SFDC_LOCAL	Jul 23, 202...	Fred William...	Dec 15, 202... Fred William...
	SFDC_LOCAL	Aug 11, 202...	Fred William...	Dec 15, 202... Fred William...
	SFDC_LOCAL	Mar 19, 202...	Fred William...	Mar 19, 202... Fred William...
	SFDC_LOCAL	Aug 11, 202...	Fred William...	Dec 15, 202... Fred William...
	SFDC_LOCAL	Mar 22, 202...	Fred William...	Mar 22, 202... Fred William...
	SFDC_LOCAL	Mar 19, 202...	Fred William...	Mar 19, 202... Fred William...
	marks	vdsvcxcxv	Aug 24, 202...	Aug 24, 202... Fred William...
	AIApplication	SFDC_LOCAL		
	AIApplicationConfig	SFDC_LOCAL		
	AIDataDefinition	SFDC_LOCAL		

Each object on 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.

Add a direct data input node filter that limits the data pulled into the recipe.



If you add a filtered direct data object to data sync later, the direct data input node's filter is converted automatically to a standalone filter node.

SEE ALSO:

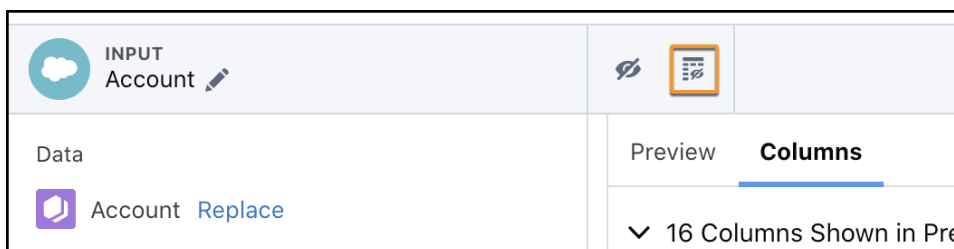
[Salesforce Help: Pull Data Directly into Recipes \(can be outdated or unavailable during release preview\)](#)

Supersize Recipe Creation

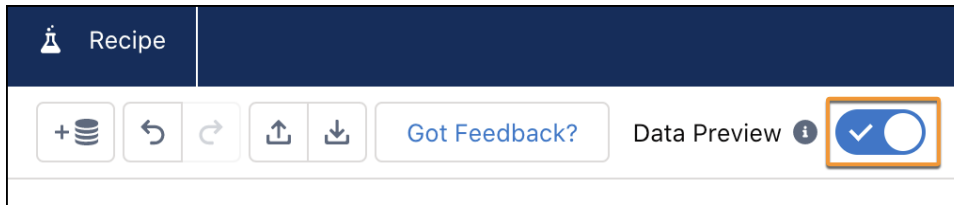
We added features to speed up data prep in large recipes. Now you can auto-hide unused columns and temporarily disable data preview for faster page loads. You can also select multiple nodes to delete them as a group, clearing up space for more recipe building.

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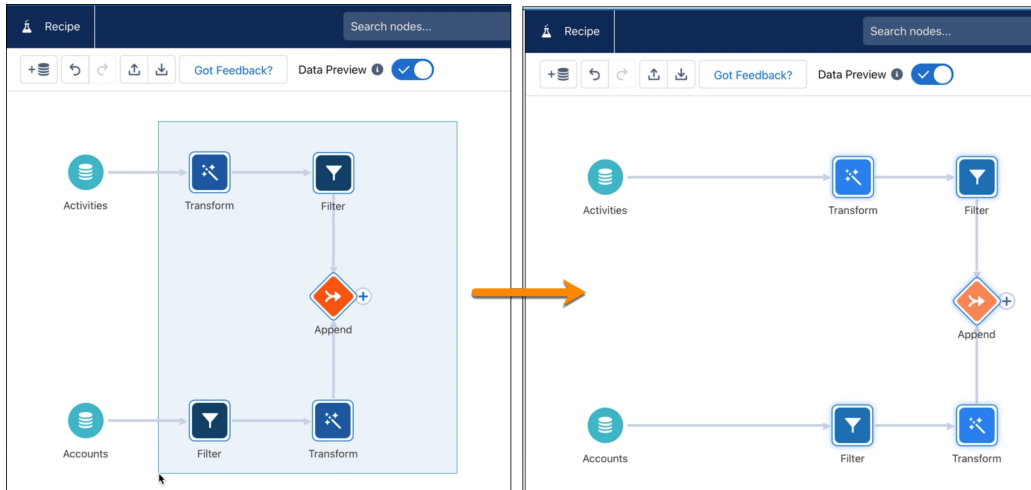
How: To speed up data preview, start by automatically hiding all columns that aren't used by recipe nodes. Click the auto-hide button on any node.



If data preview is still delayed, switch off data preview. You can always turn it back on when you want to see your progress.



Manage multiple nodes on the data prep graph by dragging your mouse to select as many nodes as you want, and delete them all at once.

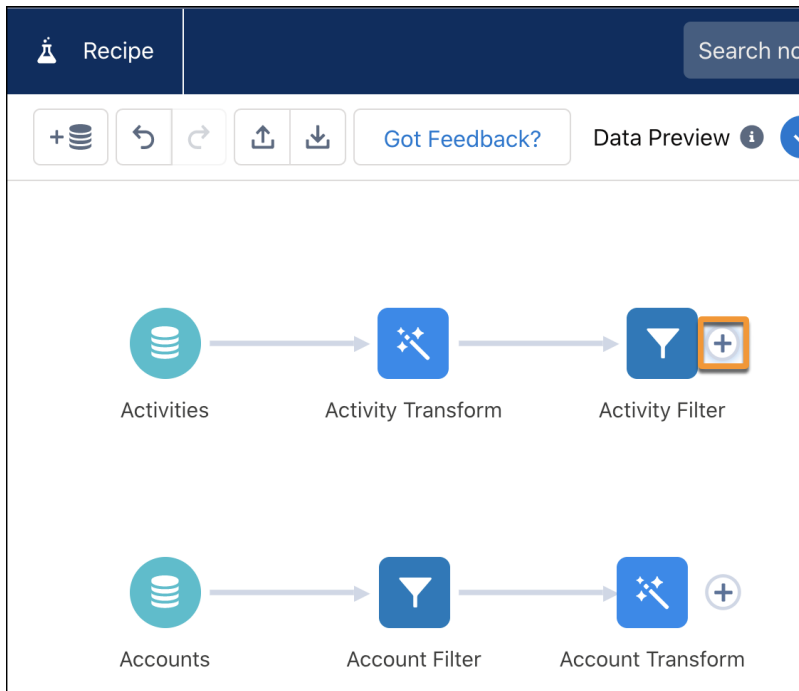


Navigate Data Prep with Accessible Keyboard Shortcuts

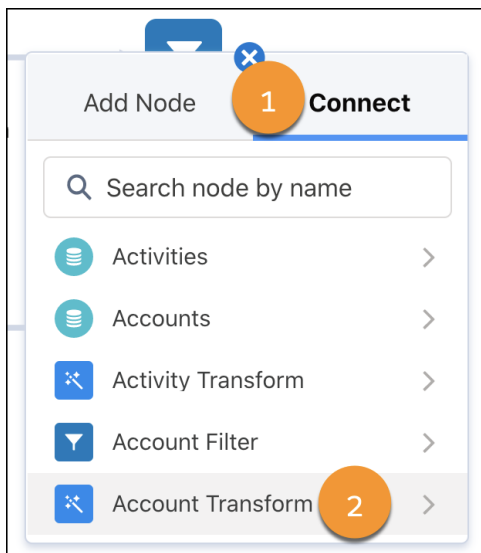
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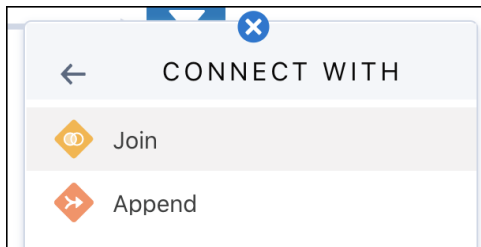
How: To open the menu of keys and shortcuts from data prep, press Ctrl+/ (Windows) or Cmd+/ (macOS). Press Tab to start the keyboard navigation and cycle between node fields. Move between nodes and menu options with the arrow keys, and press Enter (Windows) or Return (macOS) to open menus and select. For example, to join the Account Transformation node to the Activity Filter node, press Tab to select the upper-left node on the graph and then press Right Arrow three times to the Add icon.



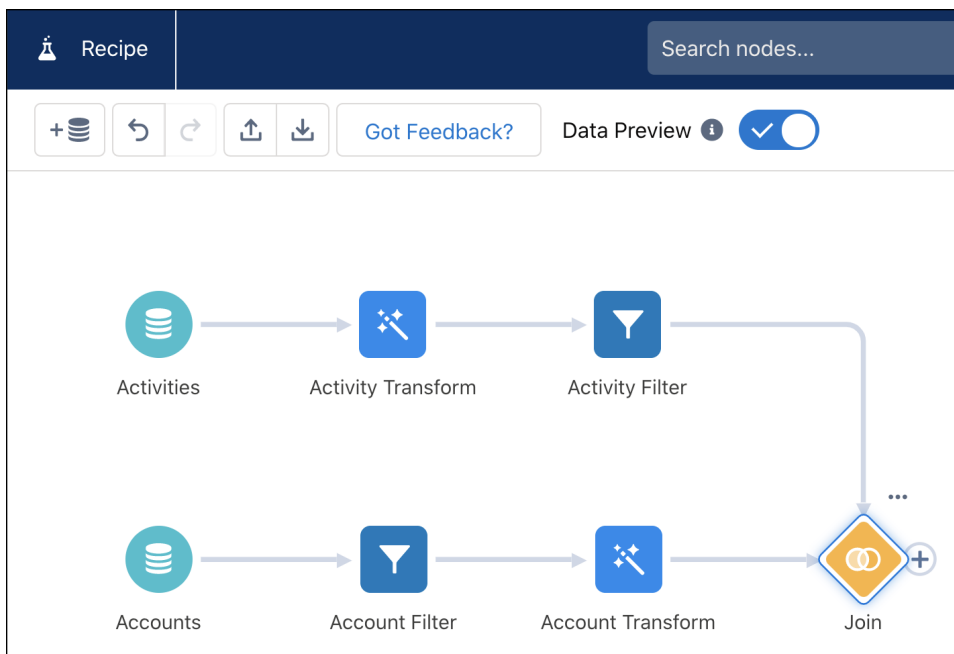
Press Enter to open the menu, and Right Arrow to open the Connect menu (1). Press Down Arrow to connect to the Account Transform node. Press Enter to confirm.



Press Down Arrow to connect with Join, and press Enter.



Configure the Join node, navigating with Tab and the arrow keys, and press Enter on the Apply button. With keys not clicks or code, the Join node is added to your recipe.



SEE ALSO:

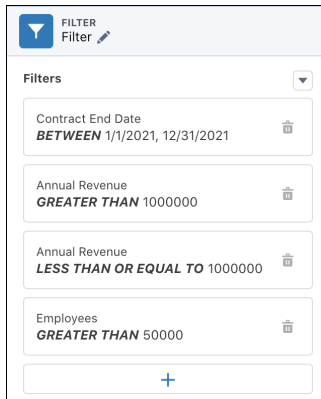
[Salesforce Help: Keyboard Shortcuts for Building Data Prep Recipes \(can be outdated or unavailable during release preview\)](#)

Filter Smarter with Custom Filter Logic

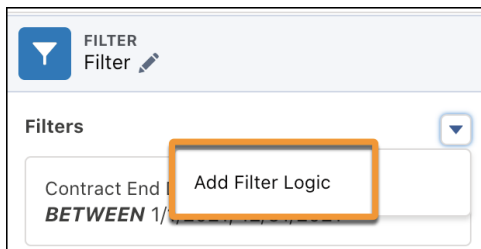
Get more granular with data prep recipe filters to include only the rows you want. Define custom filter logic with parentheses and the AND, OR, and NOT Boolean operators, such as (1 AND 2) OR 3. Previously, you filtered data that met all specified conditions. For example, now you can focus on accounts with contracts expiring this year that are currently high value, or low value but with many employees.

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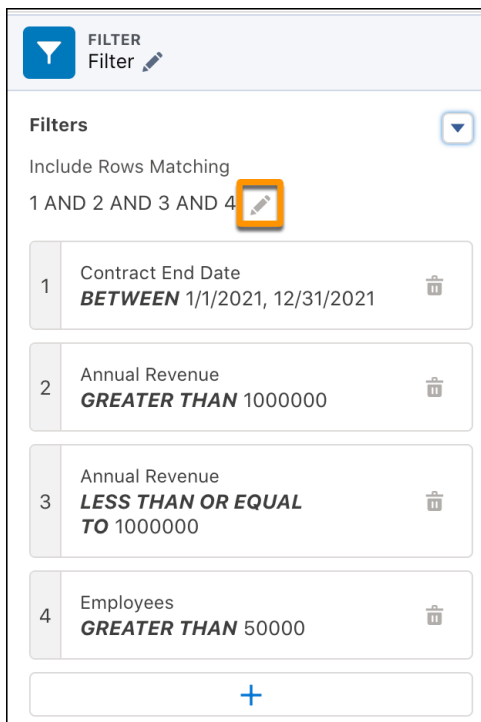
How: After you add a filter node to your data prep recipe, create the individual components of the filter. This example adds filters for the contract end date this year, annual revenue greater than 1 million, annual revenue less than or equal to 1 million, and employees greater than 50,000.



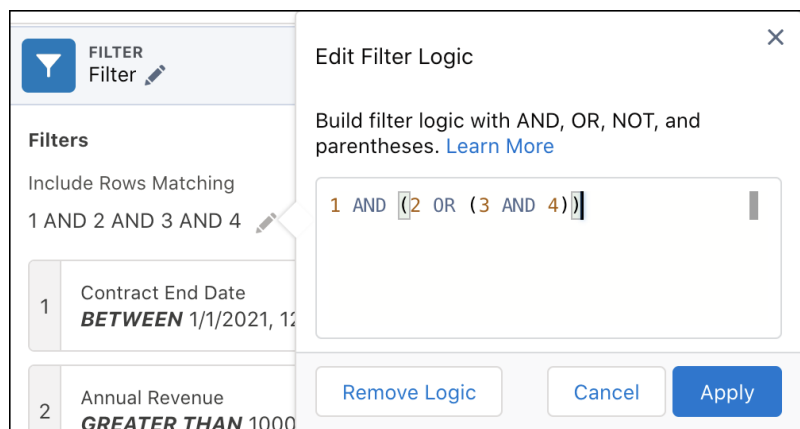
Add the filter logic from the menu button (▾).



The default AND logic is shown, and each filter component is assigned a number. To edit the logic, click the pencil icon.



Build the filter logic with parentheses and the AND, OR, and NOT Boolean operators. For our example, we want the contract date AND either the revenue greater than 1 million OR less than 1 million AND employees over 50,000.



SEE ALSO:

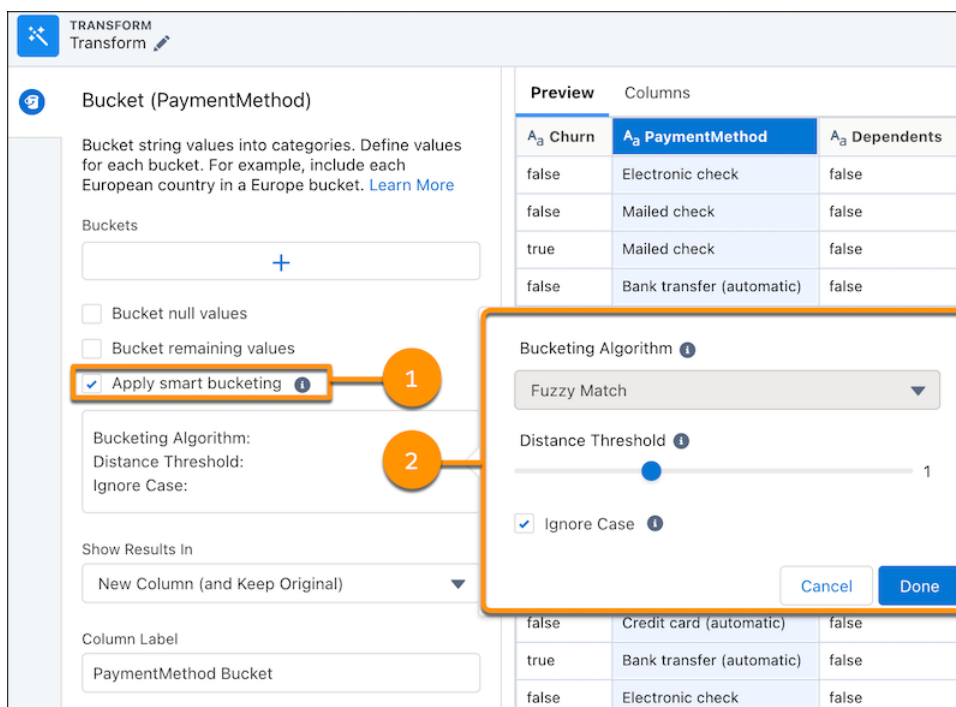
[Salesforce Help: Filter Node: Filter Rows \(can be outdated or unavailable during release preview\)](#)

Bucket Smarter with Fuzzy Match for Data Prep Bucketing

You can now use typographic fuzzy matching in your Data Prep recipe buckets to automatically handle spelling variations. Spelling differences in dimension data can split rows into separate buckets when they really belong in the same bucket. Differences in capitalization, pluralization, abbreviations, and regional variations such as behavior and behaviour create ambiguity about how to group the data. If you enable fuzzy matching on a text column, Einstein ignores capitalization so that variations such as flavor, Flavor, flavour, and flavors all can belong in the same bucket.

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 a Data Prep recipe, select a dimension, add a Transform node, choose bucketing, and select **Apply Smart Bucketing** (1).



To change the edit distance, use the Distance Threshold slider (2). 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 text matching. In the flavors example, the variation flavored belongs in a separate bucket because its edit distance is 2. By default, differences in uppercase and lowercase characters are ignored.

Guide the Optimal Number of Clusters

Identifying hidden relationships across big data using cluster analysis is easier with more options to find the optimal number of cluster transformation groupings. You can now define the number of clusters, allow the clustering algorithm to determine the optimal number, or guide the algorithm with a base cluster number. For example, guide the cluster transformation to use the optimum cluster number from a base of 10. The algorithm evaluates all options 25% above and below your base, so 7–13, to find the best data organization where data groupings are most like each other. Previously, you set the number of clusters, so you manually ran the cluster transformation and evaluated data grouping alikeness for each cluster count from 7 to 13. You can also compare between differently scaled data more easily by rescaling each column's data values from 0 through 1.

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 add a cluster transformation to a recipe, enter a number of clusters as a starting point, and then select to use the optimal number of clusters.

TRANSFORM
Transform

Cluster

Clustering intelligently segments data into distinct clusters with defining characteristics shared among the data in each cluster. [Learn More](#)

Number of Clusters
3

☒ Detect Optimal Cluster Count ⓘ

* Columns Used to Determine Clusters ⓘ [Remove All](#)

Search columns...

Employees

Annual Revenue

> Advanced Configuration

* Show Results In
New Column (and Keep Original) ▼

* Column Label
Cluster

Cancel Apply

Apply the transformation, and run the recipe. For the best data organization, the cluster transformation evaluates cluster numbers 25% above and below your starting point. For example, if you enter 20, the transformation evaluates scenarios from 15 through 25 and shows data for the optimum number of clusters in that range.

If you select to find the optimal number of clusters without entering a number of clusters, the transformation evaluates each clustering scenario 2–50. This evaluation takes more time than if you enter a starting number of clusters, but it can reveal a data relationship that you weren't aware of.

To switch all column values to a similar scale to help comparisons, select **Min-Max scaling** (1) and whether to create a column for these converted values (2). The transformation converts data in each selected cluster column to values from 0 through 1 relative to each other.

Cluster

Clustering intelligently segments data into distinct clusters with defining characteristics shared among the data in each cluster. [Learn More](#)

Number of Clusters

☐ Detect Optimal Cluster Count ⓘ

* Columns Used to Determine Clusters ⓘ [Remove All](#)

×

×

▼ Advanced Configuration

Clustering Algorithm

KMeans

▼

Scale Measure ⓘ

Min-Max scaling

1

▼

☒ Create columns from scaled measures ⓘ

2

▼

* Show Results In

New Column (and Keep Original)

▼

* Column Label

SEE ALSO:

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

Get Unselected Values Included in Pivot Output

Leave no data behind when you pivot. Your values that aren't picked are now automatically included in a column labeled Other when you pivot with the Data Prep aggregate node. For example, you can group columns by opportunity type, select your most important types, and let the rest be grouped in the Other column. Previously, these rows were dropped from the output.

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

Reference Aggregation Results with Ease

Data Prep recipe aggregation results now automatically generate more meaningful column names for pivot groups for use in your data prep, explorations, and visualizations. For example, in a row count aggregate with a column grouping for escalation, the column is now named `Rows by TRUE` with an API name of `COUNT_Rows_TRUE`. Previously, the column was named `TRUE_Rows` with an API name of `Escalated_[#]`.

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 see the names of the columns automatically generated in an aggregation, select **Columns** next to Preview in your Data Prep recipe aggregate node.

The screenshot shows the 'Data Prep' interface for an 'Aggregate' node. The 'Columns' tab is selected in the 'Preview' section. The table below shows the columns generated by the aggregation:

Name	API Name	Type	Source
Priority	Priority	Dimension	CaseShapeBanking
Rows by FALSE	COUNT_Rows_FALSE	Measure	Derived Field
Rows by TRUE	COUNT_Rows_TRUE	Measure	Derived Field
Rows by Other	COUNT_Rows_Other	Measure	Derived Field

In the left sidebar, under 'Hierarchical Aggregation', the 'Aggregates' section shows 'Rows' selected. Under 'Group Rows', 'CaseShapeBanking Priority' is selected. Under 'Group Column', 'Escalated EQUALS FALSE, TRUE' is selected.

Roll Up Hierarchical Data

Data Prep recipes have leveled up to handle your multilevel data. You can now apply aggregation to your hierarchical data to sum values at each level of the relationship, instead of calculating manually. For example, you can roll up revenues, assets, or liabilities for companies and their subsidiaries. Or, you can roll salesperson data up the management chain to see aggregates by team, region, area, and beyond. You can also apply percentage splits to allocate portions to different parents such as commission among members of the sales team.

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 aggregate across multilevel data, select **Hierarchical Aggregation** (1) in your Data Prep recipe aggregate node. Define your aggregates (2), such as the sum of a measure or count of rows. Specify the record ID (3) and the parent ID (4) columns. Optionally, select the percentage column (5) to multiply the aggregate by if you want to apply a percentage split.

AGGREGATE Aggregate

Summarize large amounts of data with aggregates and groups. Add an aggregate to start. To get final column results, run the recipe.

Hierarchical Aggregation ☒ 1

*** Aggregates**

Raw_Sales
Sum Target

Rows

*** Record ID Column**

A_a Salesperson 2

*** Parent ID Column**

A_a Manager 3

Roll-Up Percentage Column

Select... 4 5

Preview Columns

A_a Salesperson	Q₁ Su
Karen Coleman	100
Craig Cooper	100
Mildred Hill	100
Louis Morris	100
C...res	100
Clarence Walker	100
Jonathan Collins	100
Judith Phillips	100
William Simmons	100
George Wright	100
Patricia Jackson	100
Er...cott	100
Douglas Harris	100
Rub...rd	100
Brad...Clark	100
Raymond James	100
Alice Stewart	100

SEE ALSO:

[Salesforce Help: Aggregate Node: Hierarchical Aggregation \(can be outdated or unavailable during release preview\)](#)

Output Fully Qualified Names in .csv Headers

Interpreting the output .csv from a Tableau CRM recipe is easier with the option to include a column's fully qualified name in the .csv header. The fully qualified name has more information about the source object to help you understand the data lineage, usually in the format [ObjectName].[APIName]. For example, the .csv header uses the fully qualified name Account.BillingCity instead of the column label BillingCity. Previously, only the column label was included in the .csv header, which made interpretation challenging if there were duplicate or similar column labels.

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 add an output node to a recipe and choose to output to CSV, you can now select to include the fully qualified name.

OUTPUT
Output

Write To
CSV

Save as a CSV to the Salesforce database. Download it later using the public API. [Learn More](#)

* User *i*
Admin User

☒ Use fully qualified names in CSV header *i*

☐ Specify CSV partition settings

Cancel Apply

SEE ALSO:

[Salesforce Help: Recipe Output to .csv \(can be outdated or unavailable during release preview\)](#)

Analytics Prebuilt Templates and Apps

The new Customer Insights app brings together Sales and Service analytics and provides a new architecture that makes it a snap to customize dashboards. Automatically install apps, starting with the Customer Insights app. Try the new Analytics for Corporate and Investment Banking app to get insights on your commercial and investment banking deals.

IN THIS SECTION:

[Unify Sales and Service Analytics in the Customer Insights App](#)

The new Customer Insights app brings together analysis of Sales and Service clouds in a unified, easy-to-customize app. Not only can you access your Sales and Service data from one place, but it's easier to understand the interactions between them. In addition, it's now a snap to customize the dashboard. Use the app components as building blocks to create the perfect dashboard for your environment. You can mix out-of-the-box components with your own, or create a dashboard by copying and pasting components.

[Visualize Your Pipeline Progression in the Revenue Operations App](#)

The new Sankey diagram in the Revenue Operations Pipeline Progression dashboard is a game changer when it comes to visualizing the state of your pipeline. The widths of the bands are linearly proportional to growth or loss, so it's easy to see the state of your pipeline at a glance. You can see how your opportunities have progressed or regressed between two points in time. You can also use this diagram to understand which stage an opportunity came from and how it ended up. For example, which opportunities resulted in closed wins during a quarter, and did the closed wins derive from negotiations or qualifications?

[Bring the Power of Analytics to Your Corporate and Investment Banking Deals](#)

The new Analytics for Corporate and Investment Banking app analyzes your data and leverages the security of your Financial Services cloud. New embedded dashboards provide actionable insights about deal progressions, pipelines, and client interactions. The Home Embedded dashboard provides pipeline metrics, account insights, interaction summaries (call reports), and revenues for a given account. Get insights about deals in an account space, client interactions, call reports, and deal progressions in the Account Embedded dashboard. Use the Deal Embedded dashboard to investigate deal progression in greater depth. You can answer questions such as which interactions have moved a deal forward and which interactions have a positive impact.

[Kick-Start Your Customer Insights App Installations](#)

Starting with the Customer Insights app, Salesforce admins can automatically install prebuilt apps that are applicable to your org when activating Tableau CRM. The auto-install option configures the correct settings for your environment, avoiding common installation errors and making the app immediately available to users in your org. This option is enabled by default in new activations of Tableau CRM and you can manually enable it for an existing org.

[Use Improved Keyboard Navigation for the Prebuilt Apps Wizard and Template Gallery](#)

The Prebuilt Apps Wizard and Template Gallery is now more accessible for all members of the Salesforce community. We've enabled keyboard navigation, making it easier for customers to use Tableau CRM. This feature is enabled by default.

SEE ALSO:

[Analytics for Loyalty](#)

[Rebate Analytics](#)

[Insurance for Financial Services Cloud](#)

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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 template is available for Tableau CRM Growth and Tableau CRM Plus users.

How: For existing Tableau CRM activations, go to Tableau CRM Analytics Studio, click **Create**, and select **App**. Find and select **Customer Insights**, and then follow the instructions in the wizard to create your app.

For new activations of Tableau CRM, the app is auto-installed by default. Salesforce performs checks to ensure that you have the correct objects, licenses, permissions, and environment to run the app. It installs it if all the criteria are met. You can view the status of your auto-installed apps by going to **Setup > Feature Settings > Analytics > Analytics > Auto-Installed Apps**.

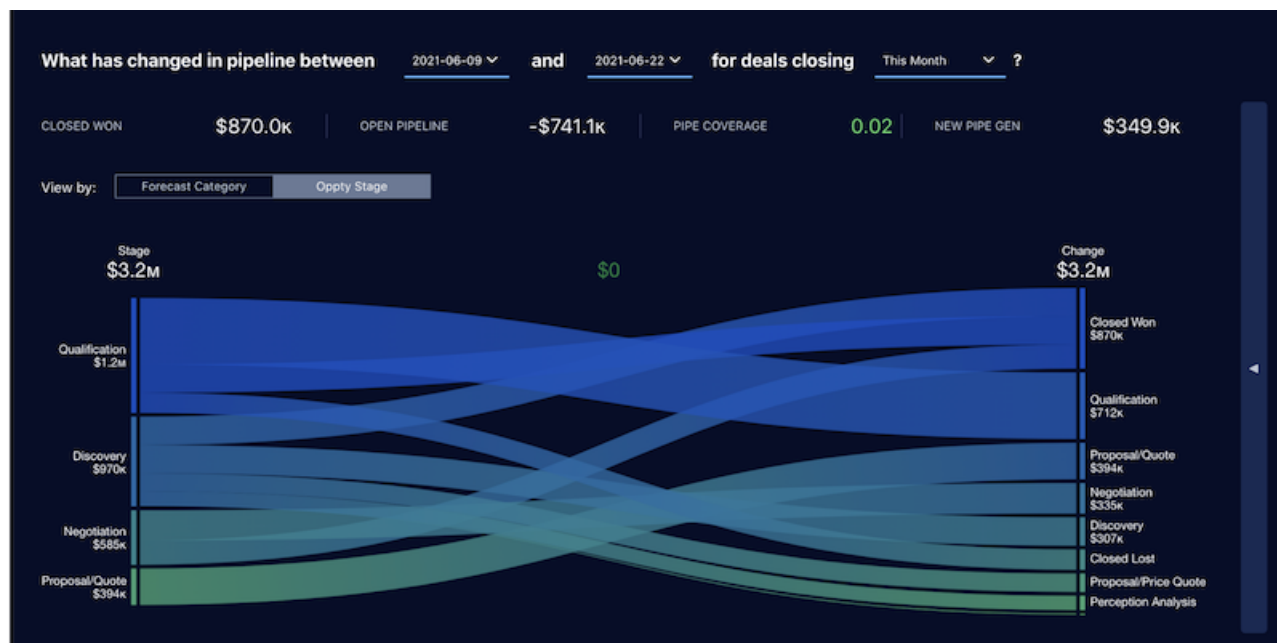
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How: In Tableau CRM Analytics Studio, click **Create**, and select **App**. Find and select **Revenue Operations Analytics**, and then follow the instructions in the wizard to create your app.

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.



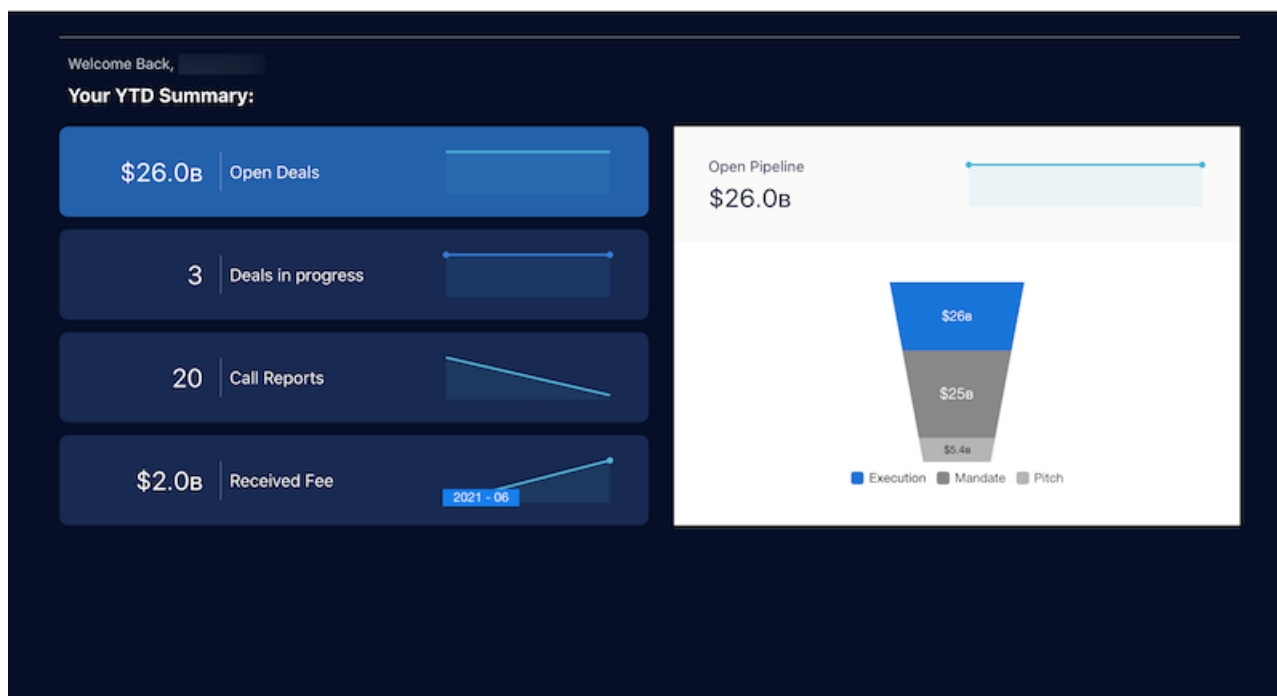
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Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: The Tableau CRM for Communications app is only for Corporate and Investment Banking cloud customers.

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



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Starting with the Customer Insights app, Salesforce admins can automatically install prebuilt apps that are applicable to your org when activating Tableau CRM. The auto-install option configures the correct settings for your environment, avoiding common installation errors and making the app immediately available to users in your org. This option is enabled by default in new activations of Tableau CRM and you can manually enable it for an existing org.

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: For orgs with Tableau CRM already enabled, go to **Setup > Feature Settings > Analytics > Analytics > Settings** and select **Enable Auto Installation of Apps**. Salesforce performs checks to ensure that you have the correct objects, licenses, permissions, and environment to run the app. It installs it if all the criteria are met. You can view the status of your auto-installed apps by going to **Setup > Feature Settings > Analytics > Analytics > Auto-Installed Apps**.

Use Improved Keyboard Navigation for the Prebuilt Apps Wizard and Template Gallery

The Prebuilt Apps Wizard and Template Gallery is now more accessible for all members of the Salesforce community. We've enabled keyboard navigation, making it easier for customers to use Tableau CRM. This feature is enabled by default.

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How: Use the tab key to move through elements on the page. You can use the **Space** or **Enter** key to select the element highlighted.

Analytics App Building

Create dashboard layouts more easily for desktop and mobile users, and add custom visualizations to dashboard charts. Skip the data prep and explore Salesforce CDP data with Tableau CRM. Bring your Snowflake data into Tableau CRM templates using live datasets.

IN THIS SECTION:

[Manage Dashboard Layouts with Ease](#)

It just got easier to give your on-the-go dashboard users the best layout for their smaller screens. Now you can create and see layouts in more ways as you build dashboards.

[Design Richer Tooltips for Chart Widgets](#)

Review more information when you hover over a visualization that illustrates key aspects of your business. In addition to custom text and legend, a chart widget's tooltip can now include a visualization. Add a chart, table, or a component that houses multiple widgets to the tooltip so that you can see related details quickly while keeping your dashboard clutter-free.

[Import Snowflake Data to Apps Using Live Datasets in Templates](#)

The Tableau CRM template framework now supports the Snowflake Direct Connector. Templated apps with Snowflake connectors import live data from Snowflake. These templated apps provide real-time metrics in dashboards and lenses using queries based on the Snowflake data.

[Jump-Start Templated App Development with Dashboard Components](#)

Manage and reuse groups of widgets across multiple dashboards with dashboard components in Tableau CRM templates. With templated apps that use dashboard components, you can reuse dashboard functionality throughout your app.

[Control Where Null Values Appear in Charts and Tables](#)

When you sort a chart or table by a field in descending order, the field's null values appear first by default. That order isn't always helpful when tracking metrics. Now set whether a field's null value records appear first or last in your charts and tables without editing SAQL queries or creating formula columns.

[Give Your Users Custom Functionality in Tableau CRM Dashboards with Lightning Web Components \(Beta\)](#)

Build richer and more customized dashboards with the power of Lightning Web Components. Lightning Web Components allow you to create customized reusable extensions for use anywhere in Lightning Experience. Create your own charts, widgets, and even Tableau data visualizations, and bring them directly into your dashboards. Now you can build a seamless experience between your custom extensions and your Tableau CRM data.

[Draw Insights on Salesforce CDP Data \(Beta\)](#)

Want actionable metrics for your Salesforce CDP data? With Tableau CRM Direct Data for Salesforce CDP, you can run deep explorations on your unified customer data source without loading data or preparing it in Tableau CRM first. After setting up a live connection to Salesforce CDP, you can run queries on Salesforce CDP data associated with the connection in real time. You can also build dashboard charts and tables based on the queries that you run on this data.

[What's New in SAQL and SQL](#)

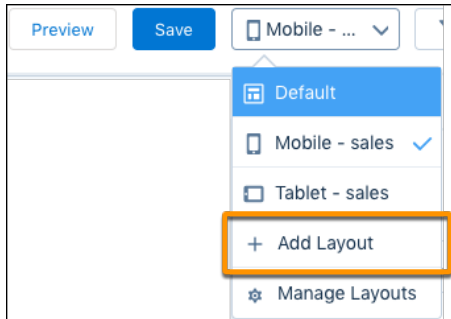
SQL goes prime time. With its Generally Available debut, we've added the ability to write windowing functions and subqueries, and include boolean expressions in `SELECT` statements. You can now use the `FETCH` clause as an alternative to `LIMIT`.

Manage Dashboard Layouts with Ease

It just got easier to give your on-the-go dashboard users the best layout for their smaller screens. Now you can create and see layouts in more ways as you build dashboards.

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 layouts with fewer clicks right where you select and manage layouts.



Create layouts using content from your existing dashboard, or start from scratch.

A screenshot of the 'Create new layout' dialog box. It has a title bar 'Create new layout'. Below the title bar, there are two input fields: 'Layout Name' with a placeholder 'Enter name' and 'Layout Type' with a dropdown menu showing 'Mobile'. Below these fields is a section titled 'Layout Options' which contains a checkbox labeled 'Copy Content' (checked) and an information icon. At the bottom right of the dialog are two buttons: 'Cancel' and 'Create'.

See layouts when you save a dashboard (1). And you get notified when your dashboard is available on mobile but you haven't yet created a mobile layout (2).

 **Note:** Dashboard properties are set to **Available on mobile** by default.

SEE ALSO:

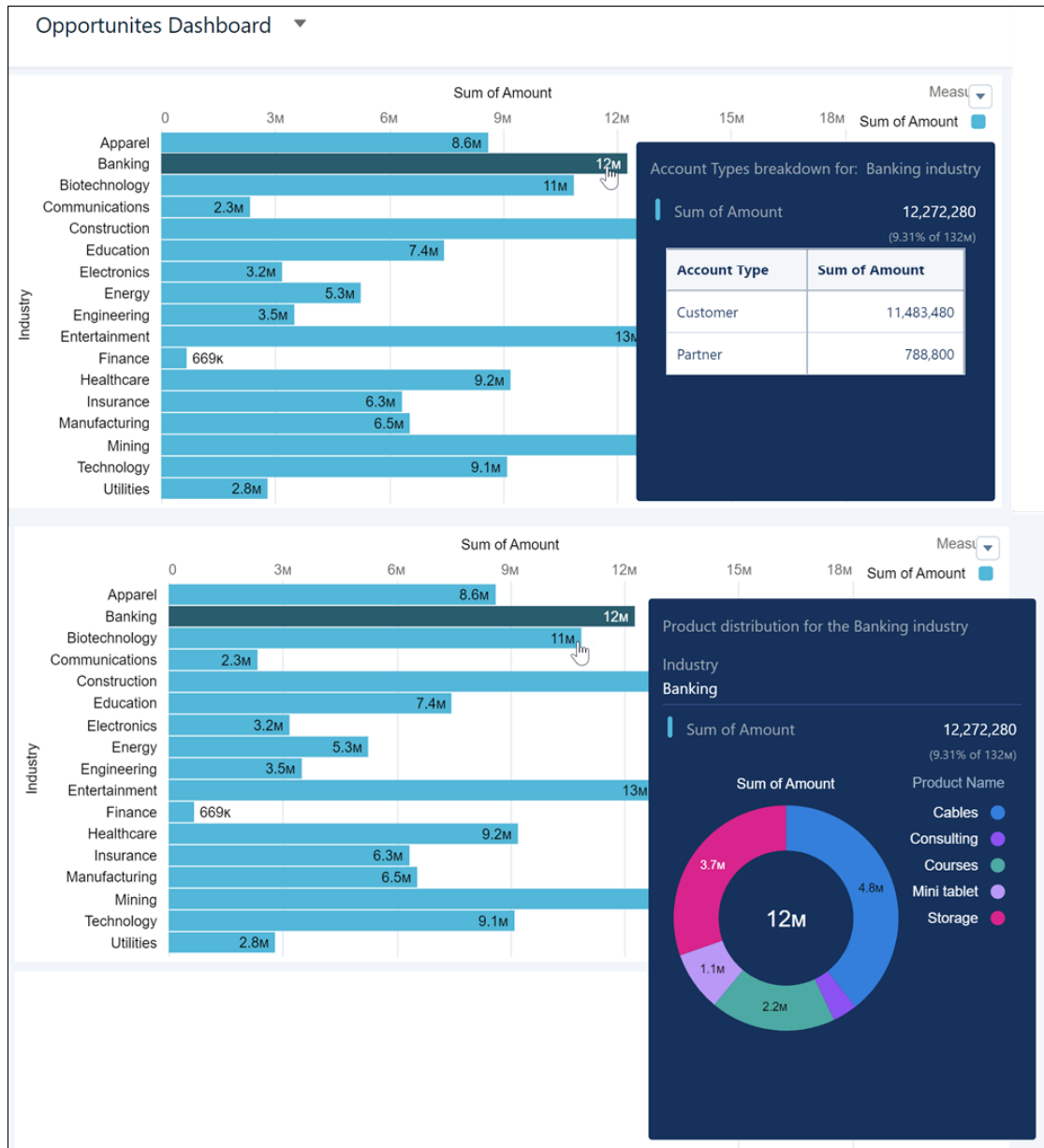
[Salesforce Help: Generate Unique Tableau CRM Dashboard Layouts for Different Devices \(can be outdated or unavailable during release preview\)](#)

Design Richer Tooltips for Chart Widgets

Review more information when you hover over a visualization that illustrates key aspects of your business. In addition to custom text and legend, a chart widget's tooltip can now include a visualization. Add a chart, table, or a component that houses multiple widgets to the tooltip so that you can see related details quickly while keeping your dashboard clutter-free.

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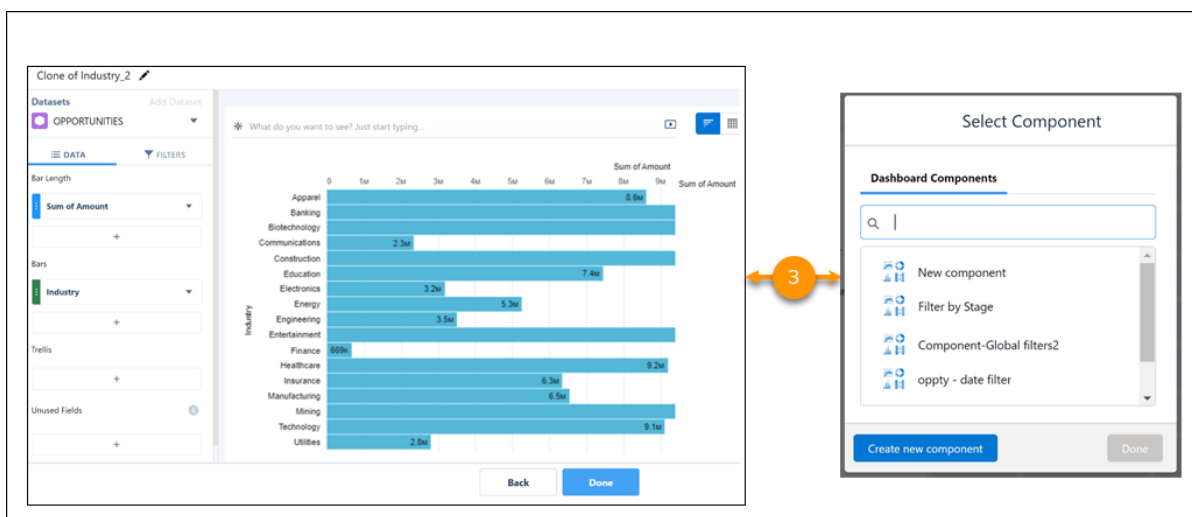
Why: Let's say your dashboard bar chart shows opportunities by industry. You can add a table in its tooltip that breaks down opportunities by account type. Or you can show a donut chart in the tooltip that captures the distribution of opportunities across products. To include these two views in the same tooltip, design a component with the chart and table, and then add it to the tooltip.



How: Consider this example, with the opportunities by industry chart selected in the dashboard designer.



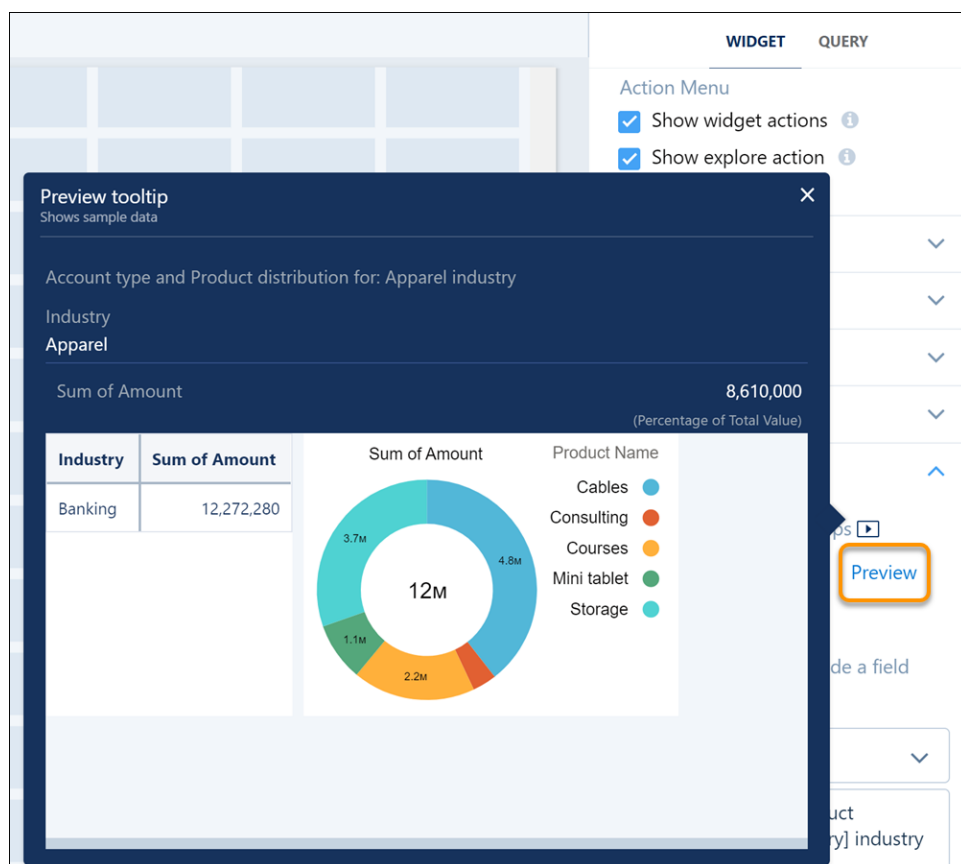
Select **Add visualization** in the tooltip section of the widget properties panel (1). Specify the type of visualization to include in the tooltip (2).



For a chart or table visualization, update its query to create the tooltip you want. Alternatively, to include a component visualization, select an existing dashboard component or create one, and then select it as your tooltip visualization.

Note: By default, for chart and table tooltip visualization types, the initial selections and filters on the visualization match the ones in the associated chart widget. And, when you hover over a chart's grouping, that grouping is applied as a filter on the tooltip.

Verify that the tooltip appears correctly by clicking **Preview**, and then save your settings.



Import Snowflake Data to Apps Using Live Datasets in Templates

The Tableau CRM template framework now supports the Snowflake Direct Connector. Templated apps with Snowflake connectors import live data from Snowflake. These templated apps provide real-time metrics in dashboards and lenses using queries based on the Snowflake data.

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: Templatize a source app that uses a Snowflake Direct Connector. Templating creates a dataset entry in `template-info.json` with a `liveConnection` attribute that specifies the connector name and the Snowflake source object. Before creating an app from the template, a Snowflake Direct Connector must exist with a developer name that is an exact match of the `connectionName` in the template.

SEE ALSO:

[Salesforce Help: Use Live Datasets in a Tableau CRM Template \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: When to Use Tableau CRM Direct Data for Snowflake \(can be outdated or unavailable during release preview\)](#)

Jump-Start Templated App Development with Dashboard Components

Manage and reuse groups of widgets across multiple dashboards with dashboard components in Tableau CRM templates. With templated apps that use dashboard components, you can reuse dashboard functionality throughout your app.

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: Templatize a source app that contains your dashboard components, allowing each app created from your template to generate unique component instances. Dashboard components are found in the components attribute of the `template-info.json` file. They're processed as other Tableau CRM assets in the template, meaning they can be conditionally created at runtime and altered with template rules.

SEE ALSO:

[Salesforce Help: Edit template-info.json \(can be outdated or unavailable during release preview\)](#)

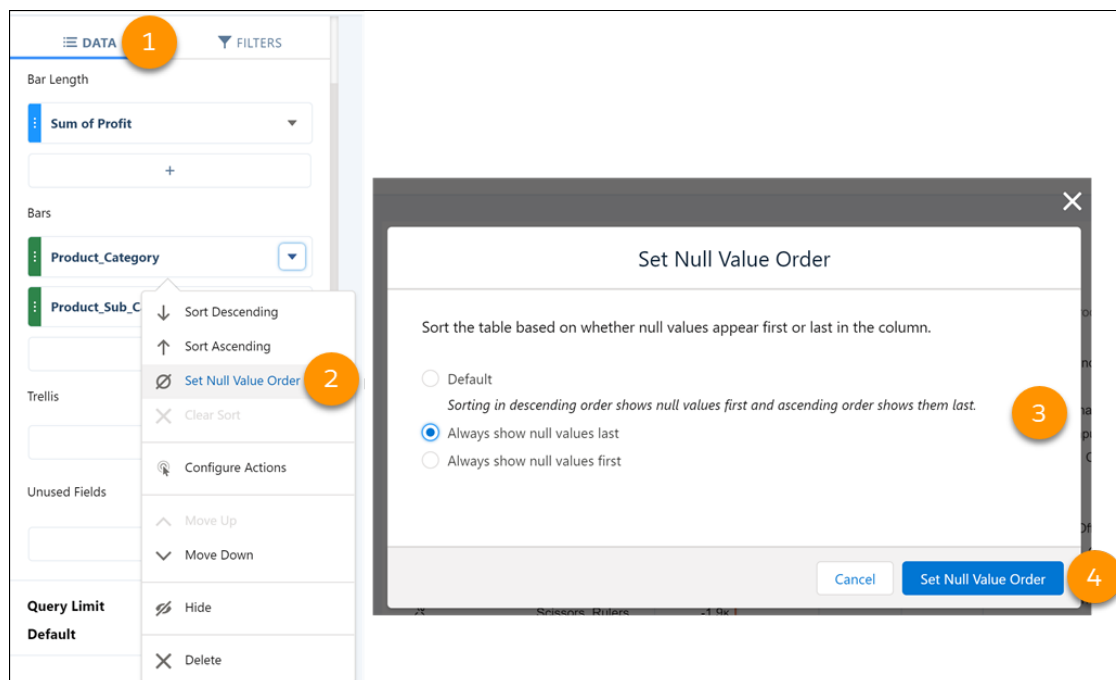
[Salesforce Help: Create and Manage Dashboards with Reusable Components \(can be outdated or unavailable during release preview\)](#)

Control Where Null Values Appear in Charts and Tables

When you sort a chart or table by a field in descending order, the field's null values appear first by default. That order isn't always helpful when tracking metrics. Now set whether a field's null value records appear first or last in your charts and tables without editing SAQL queries or creating formula columns.

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 order a field's null values, go to the Data tab in explorer (1). From the field's action menu, select **Set Null Value Order** (2). Specify how you want null values to appear in the field (3). Click **Set Null Value Order** when done (4).



Give Your Users Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Beta)

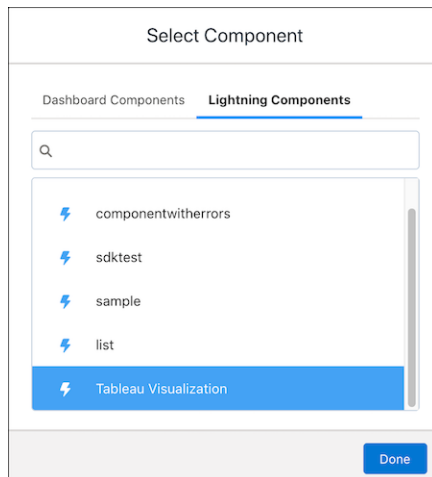
Build richer and more customized dashboards with the power of Lightning Web Components. Lightning Web Components allow you to create customized reusable extensions for use anywhere in Lightning Experience. Create your own charts, widgets, and even Tableau data visualizations, and bring them directly into your dashboards. Now you can build a seamless experience between your custom extensions and your Tableau CRM data.

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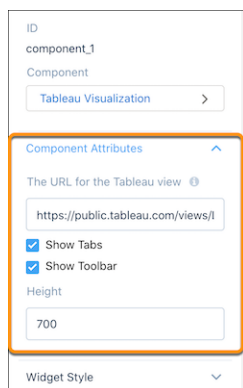
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

How: In Tableau CRM Analytics Studio, open the dashboard designer, and add a **Component** widget. Select the **Lightning Components** tab, choose the component that you want to add to your dashboard, and then click **Done**.

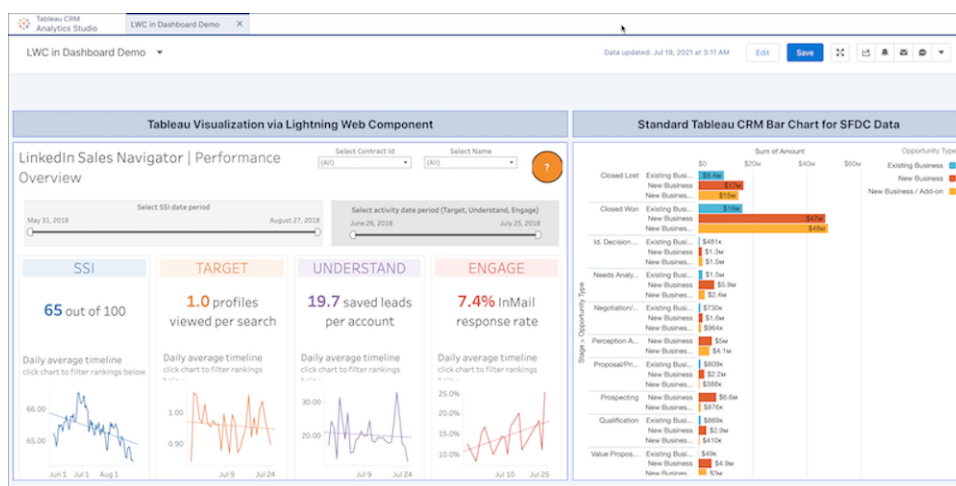


If no custom Lightning Web Components are available, the component list is empty.

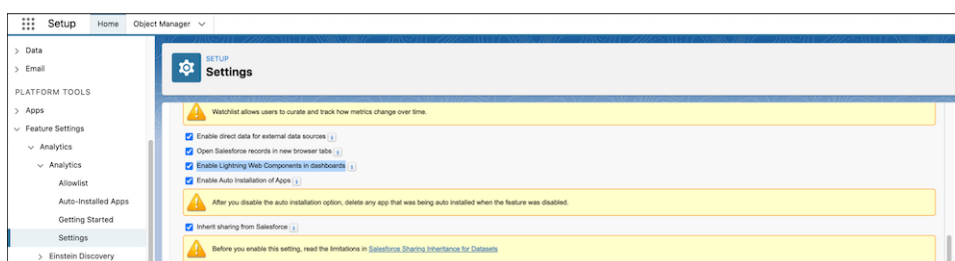
Use the widget properties to define the Component Attributes that your Lightning Web Component must have to function correctly.



Each component has different attributes that are defined by the component, like text fields, properties, Boolean options, URLs, and more. Preview your changes, and save your dashboard.



Important: To use this feature in Winter '22, your admin must enable the **Enable Lightning Web Components in dashboards** setting on the Analytics Settings page in Setup.



SEE ALSO:

[Salesforce Help: Add Lightning Web Components to the Dashboard \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Draw Insights on Salesforce CDP Data (Beta)

Want actionable metrics for your Salesforce CDP data? With Tableau CRM Direct Data for Salesforce CDP, you can run deep explorations on your unified customer data source without loading data or preparing it in Tableau CRM first. After setting up a live connection to Salesforce CDP, you can run queries on Salesforce CDP data associated with the connection in real time. You can also build dashboard charts and tables based on the queries that you run on this data.

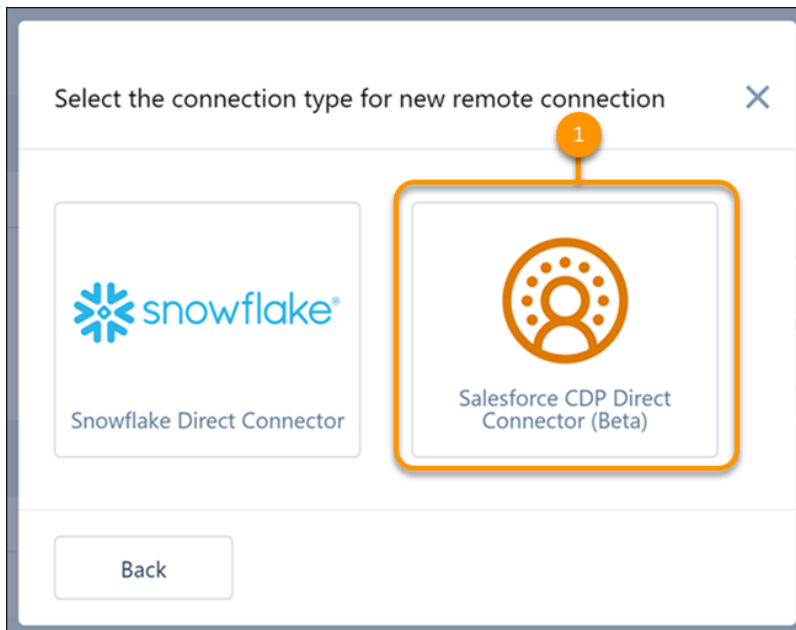
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Note: 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](#).

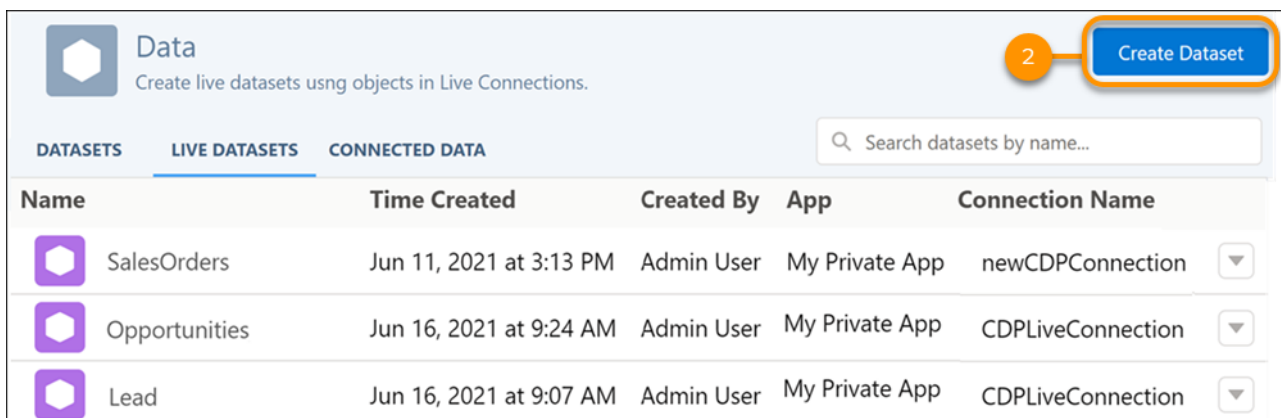
Who: Tableau CRM Direct Data for Salesforce CDP is available to users with a Salesforce CDP license.

Why: With Tableau CRM Direct Data for Salesforce CDP, you can analyze your customer data to identify the customers most likely to churn. Or, create powerful visualizations that reveal purchasing patterns within various customer segments.

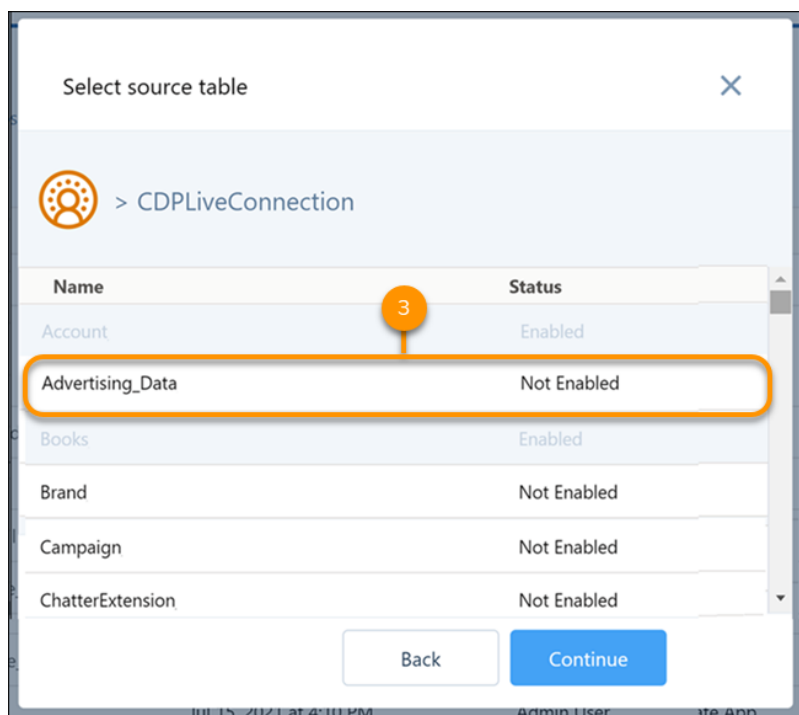
How: By default, **Enable Analytics Direct Data for external data sources** is turned on in the Analytics Settings page.



From the Connect tab of the Tableau CRM Data Manager, create a live connection using **Salesforce CDP Direct Data Connector (Beta)** (1).



In the **Data** tab of the data manager, with **Live Datasets** selected, create a live dataset (2).



Select the connection and enable a Salesforce CDP source table that is available with the connection (3). Name the live dataset, and then assign it to an Analytics app. Use the app to control which Salesforce users, roles, and groups have access to explore Salesforce CDP data with the connection. When done, click **Create Live Dataset**.

To begin exploring, click the live dataset from the Datasets tab in Analytics Studio.

SEE ALSO:

[Salesforce Help: Salesforce CDP \(can be outdated or unavailable during release preview\)](#)

What's New in SAQL and SQL

SQL goes prime time. With its Generally Available debut, we've added the ability to write windowing functions and subqueries, and include boolean expressions in `SELECT` statements. You can now use the `FETCH` clause as an alternative to `LIMIT`.

IN THIS SECTION:

[Fast-Track Your Queries with SQL for Tableau CRM \(Generally Available\)](#)

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.

[Convert Multivalue Fields to String Fields in SAQL \(Generally Available\)](#)

Querying multivalue fields presents a challenge: Only one item appears in query results. By converting each set of multiple values to a single, alphabetical, delimited string, a new SAQL function, `mv_to_string()`, now generally available, shows all items in a multivalue field. The field remains multivalue in the dataset. This change applies to the query projection and results only.

Refine Aggregations with Window Functions

A window function lets you perform calculations on a selection—or "window"—of rows. You can think of them as powerful aggregate functions. With `count()` and `sum()`, for example, your results are grouped into a single row. When you use a window function, you can perform additional operations on row results, such as ranking and calculating totals.

Build Complex, Maintainable Queries with Subqueries

Sometimes, your queries have a lot to say: join these datasets, filter on a subset, then operate on a further subdivision. Streamline your SQL queries with subqueries to isolate and nest each part of a statement. By using subqueries, your query is easier to read and maintain in the long run.

Return True or False As Query Results with Boolean Expressions in Select Statements

Is SQL for Tableau CRM better than ever with boolean expressions in `SELECT` statements? `True`. Previously, boolean expressions were available in `WHERE` statements only. When you include a boolean expression in `WHERE`, your query filters on a condition that is true or false, and the query results reflect values that meet the condition. By including a boolean expression in `SELECT`, your query can now return `true` or `false` as results. Boolean expressions are commonly used with `count` to find the number of entities that meet specific criteria.

Return Rows the ANSI SQL Way with the Fetch Clause

We made it easier to follow the SQL standard by including the `FETCH` clause as an alternative to `LIMIT`. `FETCH` is functionally similar to `LIMIT`: It specifies the number of rows to return from query results. You can also count rows from an offset. A typical use case for a limit and offset is pagination. While `LIMIT` is popular among many databases that use SQL such as PostgreSQL and MySQL, it isn't part of the SQL standard.

Build Advanced Interactions with Data Serialization Functions for SQL

Love adding interactions in your dashboard builders, but more comfortable writing queries for them in Structured Query Language (SQL)? Now you can use data serialization functions in SQL to perform dynamic filtering, grouping, and sorting on dashboard widgets based on standard or live datasets, or Salesforce objects.

Fast-Track Your Queries with SQL for Tableau CRM (Generally Available)

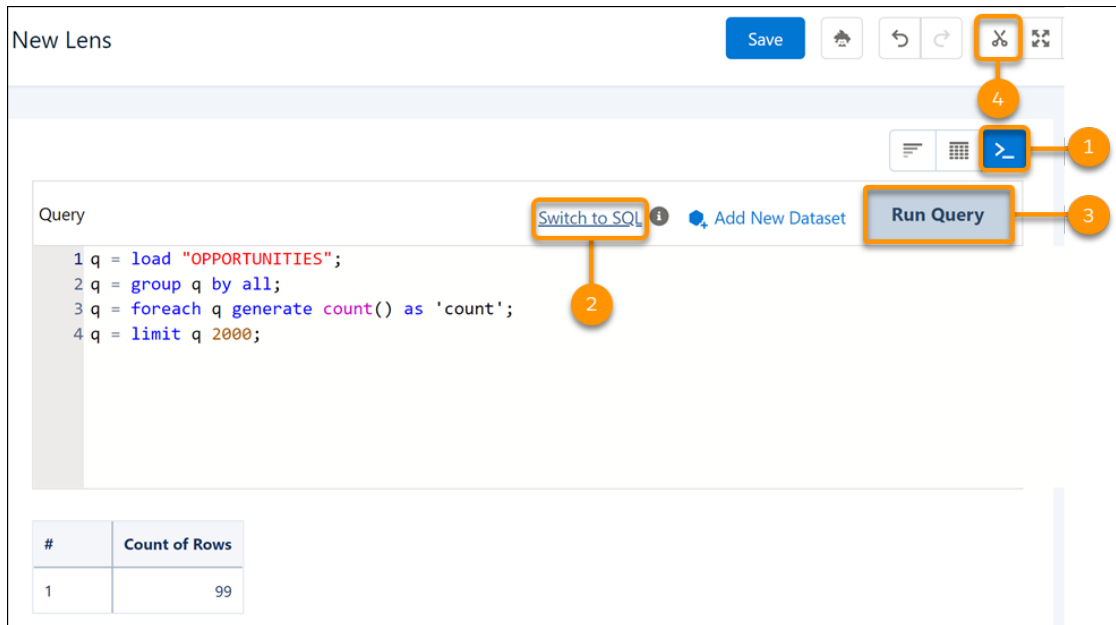
SQL for Tableau CRM is a query language that lets you execute queries against your Tableau CRM datasets. Structured Query Language (SQL) is typically used for working with data stored in relational databases. Tableau CRM uses the ANSI SQL interface to access Tableau CRM's fast in-memory data store. It has native support of Salesforce features used in Tableau CRM, including sharing inheritance and custom fiscal calendars.

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: 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: To create SQL queries for a dataset, in Tableau CRM Analytics Studio, open the dataset, and click **Query Mode** (1). Then click **Switch to SQL** (2). Switching to SQL provides a warning that switching clears your current query. If you don't want to lose the SAQL query, copy it before switching to SQL. 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).



SQL for Tableau CRM supports these standard SQL features:

- SELECT
- FROM
- WHERE
- GROUP BY
- GROUPING
- ROLLUP
- HAVING
- ORDER BY
- LIMIT
- FETCH
- OFFSET
- UNION
- CASE statements
- COALESCE
- NULLIF
- Select aggregate, windowing, math, and string functions, and subqueries

SEE ALSO:

[SQL for Tableau CRM Developer Guide: Introducing SQL for Tableau CRM \(can be outdated or unavailable during release preview\)](#)

Convert Multivalue Fields to String Fields in SAQL (Generally Available)

Querying multivalue fields presents a challenge: Only one item appears in query results. By converting each set of multiple values to a single, alphabetical, delimited string, a new SAQL function, `mv_to_string()`, now generally available, shows all items in a multivalue field. The field remains multivalue in the dataset. This change applies to the query projection and results 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.

Who: To use SAQL, you must have a Tableau CRM Platform license.

Why: Say that you have a dataset that tracks which salespeople work with each account. The dataset has two columns: `Account` and `Account Team`, and `Account Team` is a multivalue field.

A simple query returns each account and the people working on that account, but the `Account Team` field shows only one person working on each account, even though there are more people.

```
q = load "Accounts"
q = foreach q generate
  'Account' as 'Account',
  'Account_Team' as 'Account Team';
```

Account	Account Team
Acme	Fred Williamson
DTC Electronics	Brian Alison
Salesforce	Nadia Smith

With the `mv_to_string()` function, analysts can convert the `Account Team` field from multivalue to an alphabetically sorted, delimited string. When converted to a string, the query results show everyone on each account team. And analysts can work with any of the SAQL string functions, for example, to search for names.

How: To use the `mv_to_string()` function, select to enable multivalue fields in Setup. If you had multivalue support in the Beta version of `mv_to_string()`, the setting is selected by default.

1. Enter *Analytics* in the **Quick Find** box.
2. Select **Settings** from the list of Analytics options.
3. In Settings, click the checkbox for **Enable indexing of multivalue fields in Tableau CRM**.

The screenshot shows the 'Analytics' settings page. At the top, there is a warning banner: 'Before you enable this setting, read the limitations in [Salesforce Sharing Inheritance for Datasets](#)'. Below this, there are several settings:

- ☒ Inherit sharing from Salesforce
- ☐ Use priority scheduling for recipe and dataflow requests
- ☒ Secure image sharing and downloading
- Maximum number of hours an app can be in progress: 48
- ☒ Enable indexing of multivalue fields in Tableau CRM. (This checkbox is highlighted with a yellow box and an information icon.)
- ☐ Disable Recipe Input Dataset Caching

 A tooltip for the 'Enable indexing...' checkbox reads: 'Show all values in a multivalue field in alphabetical order returned by the mv_to_string() function. Otherwise, mv_to_string() shows only the first value in alphabetical order.'

Note: In order for `mv_to_string` to display all values of a multivalue field, dataset registration requires extra indexing. That indexing can slow registration down. If this is a concern, don't enable indexing of multivalue fields. If you run `mv_to_string()` with the indexing turned off, the function returns the first value in the first field only.

To convert a multivalue field to a string, invoke the `mv_to_string()` function.

```
q = load "Accounts";
q = foreach q generate
```

```
'Account' as 'Account';
mv_to_string('Account_Team') as 'Account Team';
```

The query now returns values of `Account Team` as a string delimited by a comma and a space (,)—the default delimiter—in alphabetical order.

Account	Account Team
Acme	Fred Williamson, Hank Chen, Sarah Vasquez
DTC Electronics	Brian Alison, Tessa McNaley
Salesforce	Nadia Smith

To return a string with a custom delimiter, specify the delimiter as a string when invoking `mv_to_string()`.

```
q = load "Accounts";
q = foreach q generate
  'Account' as 'Account';
  mv_to_string('Account_Team', ";;") as 'Account Team';
```

The query returns the values of `Account Team` delimited by two semicolons (;;) in alphabetical order.

Account	Account Team
Acme	Fred Williamson;;Hank Chen;;Sarah Vasquez
DTC Electronics	Brian Alison;;Tessa McNaley
Salesforce	Nadia Smith

`mv_to_string()` applies to non-grouped dimensions only. You can run filtering or grouping on a multivalue field post-projection. Here's the syntax of the `mv_to_string()` function.

```
mv_to_string(multi-value_column_name, delimiter)
```

multi-value_column_name

Name of the multi-value field to be converted to a string.

delimiter

Optional. The characters used to delimit values in the converted string. Maximum length is 2 characters. Default value is a comma followed by a space (,).

SEE ALSO:

[Tableau CRM SAQL Developer Guide: mv_to_string\(\)](#) (can be outdated or unavailable during release preview)

Refine Aggregations with Window Functions

A window function lets you perform calculations on a selection—or "window"—of rows. You can think of them as powerful aggregate functions. With `count()` and `sum()`, for example, your results are grouped into a single row. When you use a window function, you can perform additional operations on row results, such as ranking and calculating totals.

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: This example calculates the top account owners and the percentage of each of their contributions relative to the other account owners for each country.

```
SELECT Billing_Country, Account_Owner, SUM(Amount)/SUM(SUM(Amount)) OVER (PARTITION BY
Billing_Country ROWS BETWEEN UNBOUNDED PRECEDING AND UNBOUNDED FOLLOWING) * 100 AS
Percent_Amount_Contribution
FROM "DTC_Opportunity"
GROUP BY Billing_Country, Account_Owner
ORDER BY Billing_Country ASC, Percent_Amount_Contribution DESC
```

Billing Country	Account Owner	Percent_Amount_Contribution
Australia	Dennis Howard	44.29
	Bruce Kennedy	41.41
	John Williams	14.3
Belgium	Julie Chavez	62.91
	Laura Garza	23.81
	Evelyn Williams	13.27
Brazil	Bruce Kennedy	100
Canada	Chris Riley	47.3
	Harold Campbell	21.87
	Laura Palmer	16.61

Here are the first ten results. The “window” is the set of rows that have the same `Billing_Country` as the current row.

The `Percent_Amount_Contribution` column is the window function's output. To find the percentage of each account owner's contribution relative to the other ones in their billing country, the window function partitions the results by billing country. The frame clause `ROWS BETWEEN UNBOUNDED PRECEDING AND UNBOUNDED FOLLOWING` refers to the first row of the partition to the last. For all of the entries in each billing country, the query divides the sum of the current account owner's contribution by the total sum of all of the account owners' contributions. To get a percentage value, the query then multiplies by 100.

SEE ALSO:

[SQL for Tableau CRM Developer Guide: Window Functions \(can be outdated or unavailable during release preview\)](#)

Build Complex, Maintainable Queries with Subqueries

Sometimes, your queries have a lot to say: join these datasets, filter on a subset, then operate on a further subdivision. Streamline your SQL queries with subqueries to isolate and nest each part of a statement. By using subqueries, your query is easier to read and maintain in the long run.

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 include a subquery in your query, after the `FROM` statement, add an additional `SELECT` statement in parentheses.

For example, this query returns the sum of all profits and the max profit value from Superstore where all profits are greater than zero. No losses are reflected in the results.

```
SELECT d.sumProfit, maxProfit
FROM (
  SELECT SUM(Profit) as sumProfit, MAX(Profit) as maxProfit
  FROM (
    SELECT Profit
    FROM "Superstore"
    WHERE Profit > 0
  )
) as d;
```

Tableau CRM first runs the innermost query.

```
SELECT Profit "Superstore" WHERE Profit > 0
```

The output from this query becomes the dataset on which the outer query operates.

```
SELECT SUM(Profit) as sumProfit, MAX(Profit) as maxProfit
FROM (innermost query);
```

Optionally, you can refer to an inner query by its alias, if you choose to use one. In the outermost query, you can refer to `sumProfit` as `d.sumProfit`, as shown in the example, or you can refer to it simply as `sumProfit`.

```
SELECT d.sumProfit, maxProfit FROM (nested subqueries) as d;
```

sumProfit	maxProfit
442,649.60	8,399.98

SEE ALSO:

[SQL for Tableau CRM Developer Guide: Subquery \(can be outdated or unavailable during release preview\)](#)

Return True or False As Query Results with Boolean Expressions in Select Statements

Is SQL for Tableau CRM better than ever with boolean expressions in `SELECT` statements? `True`. Previously, boolean expressions were available in `WHERE` statements only. When you include a boolean expression in `WHERE`, your query filters on a condition that is true or false, and the query results reflect values that meet the condition. By including a boolean expression in `SELECT`, your query can now return `true` or `false` as results. Boolean expressions are commonly used with `count` to find the number of entities that meet specific criteria.

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 include a boolean expression in `SELECT`, add it directly following the `SELECT` clause.

This example demonstrates a query that satisfies two numerical logical conditions.

```
SELECT Profit > 0 and Profit < 100 as Profits FROM "Superstore" LIMIT 5;
```

Profits
true
false
true
false
true

This example demonstrates a text comparison.

```
SELECT Customer_Name LIKE 'A%' as "A Names" FROM "Superstore" LIMIT 5;
```

A Names
false
false
false
false
true

SEE ALSO:

[SQL for Tableau CRM Developer Guide: Boolean Expressions in SELECT Clause \(can be outdated or unavailable during release preview\)](#)

Return Rows the ANSI SQL Way with the Fetch Clause

We made it easier to follow the SQL standard by including the `FETCH` clause as an alternative to `LIMIT`. `FETCH` is functionally similar to `LIMIT`: It specifies the number of rows to return from query results. You can also count rows from an offset. A typical use case for a limit and offset is pagination. While `LIMIT` is popular among many databases that use SQL such as PostgreSQL and MySQL, it isn't part of the SQL standard.

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 this example, because there is an offset of one row, `FETCH` starts from the second value of the `City` column, ordered ascending. The query returns the next three rows, which are the second, third, and fourth rows.

```
SELECT City
FROM "Superstore"
ORDER BY City
OFFSET 1
FETCH NEXT 3 ROWS ONLY;
```

City
Abilene

City
Akron
Akron

SEE ALSO:

[SQL for Tableau CRM Developer Guide: Fetch Clause \(can be outdated or unavailable during release preview\)](#)

Build Advanced Interactions with Data Serialization Functions for SQL

Love adding interactions in your dashboard builders, but more comfortable writing queries for them in Structured Query Language (SQL)? Now you can use data serialization functions in SQL to perform dynamic filtering, grouping, and sorting on dashboard widgets based on standard or live datasets, or Salesforce objects.

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: SQL for Tableau CRM supports these data serialization functions:

- `asSQLSelect()`
- `asSQLOrder()`
- `asSQLGrouping()`
- `asSQLWhere()`
- `asSQLHaving()`

Einstein Discovery

Operationalize externally built models that you easily upload and deploy into Salesforce. Translate unstructured data into valuable insights with sentiment analysis. Get predictive and prescriptive intelligence directly in your automated business processes.

IN THIS SECTION:

[Operationalize Externally Built Models in Salesforce \(Generally Available\)](#)

Augment your predictive powers with externally built models that you can quickly put into production. 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.

[Translate Unstructured Data into Valuable Insights with Sentiment Analysis \(Generally Available\)](#)

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 OK" is neutral, and "Not a great experience" is negative. Einstein Discovery lets you 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.

[Add Einstein Discovery Insights to Your Flows](#)

Get predictive and prescriptive intelligence directly in your flows with Einstein Discovery powered models. Select the values to use in your predictions, and let Einstein Discovery generate suggested improvements and predictors.

[Gather Insights Directly from Your Snowflake Schema \(Pilot\)](#)

Create stories faster with your Snowflake tables using the Tableau CRM Direct Data for Snowflake connector. The same Live Connector that's used for data exploration and queries now can initiate predictive and prescriptive insights and build corresponding models without replicating a dataset.

[Deploy Better Models with Enhanced Model Quality Alerts](#)

Automatic quality alerts direct you to augment model performance before deployment so that your model provides better insights, predictions, and improvements. Einstein Discovery alerts you to possible model quality issues by examining your training data and model metrics. Einstein now detects imbalanced distributions, possible data leakage, and no correlation issues in your training data. Einstein Discovery also checks certain quality metrics for your model and alerts you to any issues it detects. For linear regression models, Einstein Discovery flags low or high R^2 . For logistic regression models, Einstein Discovery flags low or high AUC (Area Under the Curve). Finally, you can now selectively choose to ignore specific alerts that you consider to not be relevant for your model.

[Predict Outcomes for Multiple Categories with Multiclass Models \(Pilot\)](#)

Einstein Discovery introduces multiclass models so that you can 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.

[Evaluate Model Performance with Validation Sets](#)

Validation sets give you a new way to simulate real-world performance and compare models for accuracy. A validation set has the same schema as the training dataset, but it contains a separate, independent collection of observations. If enabled in a story, Einstein runs the associated model on the data in the validation set. Einstein then calculates its accuracy by comparing the model's predicted outcomes with the actual outcomes in the validation set. Validation sets provide another way in which to test your model's performance so that you can more confidently deploy it in Salesforce.

[Speed Up Story Creation with Smart Sampling \(Pilot\)](#)

Analyzing a sufficiently representative subset lets you create stories and story versions faster and with confidence. Train your model with Smart Sampling for datasets of 300,000 rows or more. Select your sample data size and allow Einstein Discovery to create a story based on a randomly selected subset of observations in your data.

[Get Reliable Insights from Unbalanced Data \(Pilot\)](#)

Compensate for unbalanced data using the new Automatic Data Rebalancing option. It enables Einstein Discovery to view the data for more balanced analysis, and Einstein Discovery can synthetically tune the distribution for a more balanced dataset. Einstein Discovery can increase frequency in the minority class by upsampling the data and reduce frequency in the majority class through downsampling. Work with the data that you have without relying on external tools for this crucial data manipulation step.

[Get Diagnostic Insights with the Insights API](#)

The Insights API allows you to embed diagnostic insights from your story into any website, application, or dashboard. Derived from historical data, diagnostic insights answer, Why did it happen? Previously, the Insights API returned only descriptive insights that answer, What happened with my data? Diagnostic insights drill deeper into correlations to help you understand which variables had the biggest impact on the business outcome you're analyzing. For example, Why did my sales increase during this quarter? or Why did case time to close increase in this region?

[Jump Start Intelligent Solutions Using Recipe-Powered Story Templates](#)

Einstein Discovery story templates now use Data Prep recipes instead of dataflows to prepare your data for analysis and model training. Creating solutions from story templates lets you extend your implementations using the latest data wrangling capabilities that recipes have to offer, such as more join types and additional smart transformations.

SEE ALSO:

[Einstein Release Notes](#)

Operationalize Externally Built Models in Salesforce (Generally Available)

Augment your predictive powers with externally built models that you can quickly put into production. 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.

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: Bundle all files associated with your TensorFlow model in a .zip file. Be sure to include all the required components:

- Python script
- Tensorflow model object
- Small CSV file containing test data to ensure that your model works as expected
- The two folders (assets/ and variables/) that are created automatically when you save your TensorFlow model

Open Model Manager, and click **Upload** to launch the Upload Model wizard.

The screenshot shows the 'Model Details' wizard interface. At the top, it says 'Model Details'. Below that, a message reads: 'To get started, provide some basic information about the external model to be uploaded to Salesforce. [Learn more](#)'. The form contains the following fields:

- Model Name:** A text input field containing 'My External Model'.
- Description:** A text area containing 'TensorFlow model I've built externally.'
- Model Type:** Two radio button options: 'Regression' (selected) and 'Binary Classification'.
- Model Runtime:** A dropdown menu showing 'TensorFlow'.

At the bottom of the form, there is a 'Cancel' button on the left, a progress indicator in the center, and a 'Next' button on the right.

Specify details about the model, then click **Next** to specify all the variables in the model.

Add Variables

Add the variables in the model. Include the outcome variable that the model predicts, such as a key performance indicator (KPI), and at least one explanatory variable. [Learn more](#)

Variable Name *	Data Type
IsWon	Text
Client Size By Revenue	Text
Competitor Type	Text
Customer Segment	Text
Deal Size Category	Text
Opportunity Amount USD	Numerical
Region	Text
Route To Market	Text
Supplies Group	Text
Supplies Subgroup	Text
Total Customer Value Segment	Text
Time to Close	Text
Total Days Identified Through Qualified	Numerical

[+ Explanatory Variable](#)

[Previous](#) [Next](#)

Select the .zip file containing the model files to upload.

Upload File

Upload the model ZIP archive file that contains the model definition, a pre-processing script, and a post-processing script. [Learn more](#)

* Upload File

my_external_model.zip

[Previous](#) [Upload](#)

Click **Upload**, and then click **Done**. You can deploy the model immediately into your Salesforce environment or add it to the Uploaded Models tab for deployment later.

 **Note:** For some functionality, feature support for imported models differs from the models that Einstein Discovery creates.

SEE ALSO:

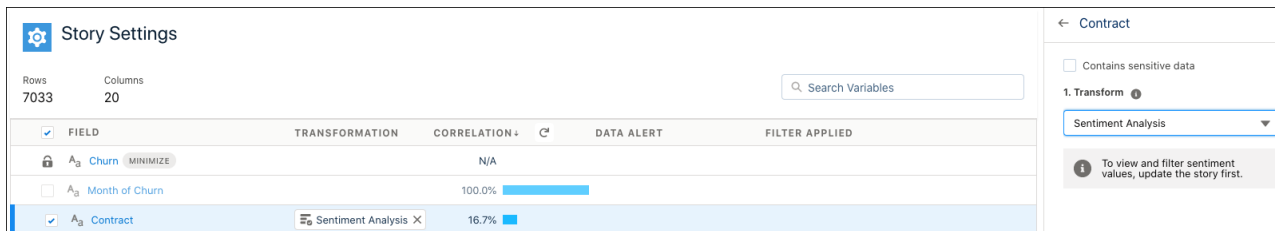
[Salesforce Help: Operationalize External Machine Learning Models \(can be outdated or unavailable during release preview\)](#)

Translate Unstructured Data into Valuable Insights with Sentiment Analysis (Generally Available)

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 OK” is neutral, and “Not a great experience” is negative. Einstein Discovery lets you 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.

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 story settings, select the variable that contains your unstructured data. Click the **Transform** dropdown menu and select **Sentiment Analysis**.



The screenshot shows the 'Story Settings' panel in Tableau CRM. The 'Rows' count is 7033 and 'Columns' is 20. A search bar for 'Search Variables' is present. The 'FIELD' tab is selected, showing a table of variables. The 'Contract' variable is selected, and the 'Sentiment Analysis' transformation is applied, resulting in a 16.7% sentiment score. The 'Transform' dropdown menu is open, showing 'Sentiment Analysis' as the selected option. A note indicates: 'To view and filter sentiment values, update the story first.'

FIELD	TRANSFORMATION	CORRELATION	DATA ALERT	FILTER APPLIED
Churn	MINIMIZE	N/A		
Month of Churn		100.0%		
Contract	Sentiment Analysis	16.7%		

SEE ALSO:

[Salesforce Help: Configure Text Variables \(can be outdated or unavailable during release preview\)](#)

Add Einstein Discovery Insights to Your Flows

Get predictive and prescriptive intelligence directly in your flows with Einstein Discovery powered models. Select the values to use in your predictions, and let Einstein Discovery generate suggested improvements and predictors.

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 Flow Builder, add an Action element to the flow, and select Einstein Discovery as the category. In the Action field, select a deployed prediction (1).

The screenshot shows the configuration page for an Einstein Discovery action. At the top, the 'Action' field is set to 'Predicted Annual Revenue' (callout 1). Below this are fields for 'Label' and 'API Name', and a 'Description' text area. The 'Get Predictions with Einstein Discovery' section contains two main options. The 'What to Store' section (callout 2) has three checkboxes: 'Predictions' (checked), 'Top Predictors', and 'Top Improvements'. The 'Select Object Record ID Field' section (callout 3) has two radio buttons: 'Select Object Record ID Field' (selected) and 'Map Fields'. At the bottom, there is a 'Record ID Field' search bar with the placeholder text 'Enter value or search resources'.

Specify whether to retrieve and store predictors and improvements (2), and generate predictions based on a record or values in the flow (3).

SEE ALSO:

[Salesforce Help: Add Insights and Intelligence to Salesforce Flows \(can be outdated or unavailable during release preview\)](#)

Gather Insights Directly from Your Snowflake Schema (Pilot)

Create stories faster with your Snowflake tables using the Tableau CRM Direct Data for Snowflake connector. The same Live Connector that's used for data exploration and queries now can initiate predictive and prescriptive insights and build corresponding models without replicating a dataset.

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: 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.

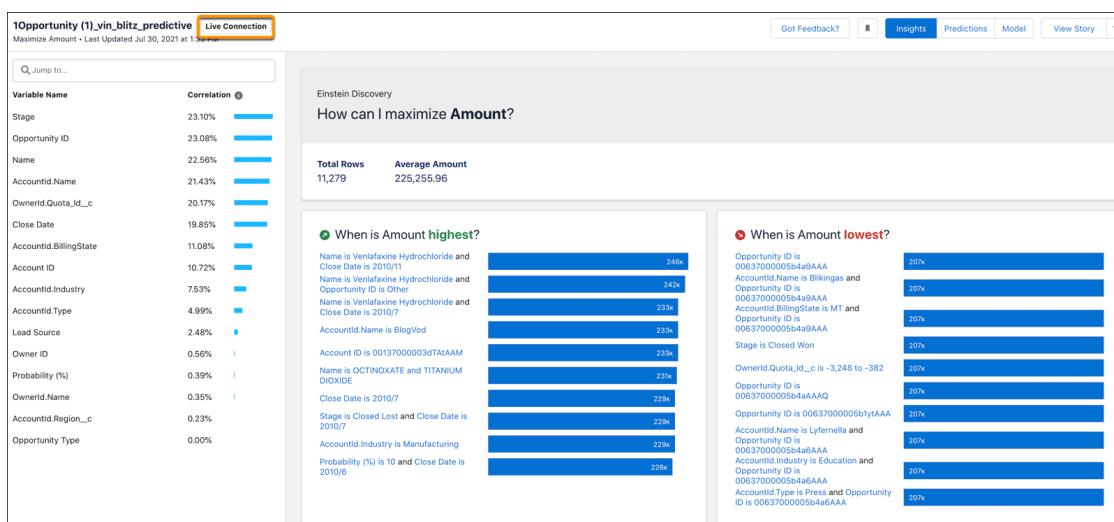
You can provide feedback and suggestions for this feature in the applicable IdeaExchange group in the [Trailblazer Community](#).

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

Use your existing Tableau CRM Snowflake Direct Connector, or create a connection to the Snowflake source table. In Tableau CRM Studio, from the Datasets tab, click the live Snowflake dataset (1), and select **Create Story** (2).

Title	Location	Type	Created By	Last Modified By	Last Modified	Data Refreshed
Opportunity_KP	My Private App	Standard	Admin User	Integration User	07/30/21, 1:47 PM	07/13/21, 3:59 PM
10Opportunity (1)	My Private App	Standard	Admin User	Integration User	07/30/21, 1:28 PM	06/28/21, 10:21 AM
EDDataset	My Private App	Standard	Admin User	Integration User	07/30/21, 1:10 PM	07/07/21, 12:27 PM
AIRLINE_DELAYS	My Private App	Live	Admin User	Admin User	06/30/21, 12:58 PM	
OPPTY6	My Private App	Live	Admin User	Admin User	06/30/21, 1:32 PM	
counties	My Private App	Standard	Admin User	Integration User	07/15/21, 11:56 AM	07/12/21, 5:03 PM
APdist	My Private App	Standard	Admin User	Integration User	07/12/21, 5:03 PM	07/09/21, 2:03 PM
EDDataset	My Private App	Standard	Admin User	Integration User	04/25/21, 2:03 PM	04/25/21, 2:03 PM

The story opens with a Live Connection notification.



Deploy Better Models with Enhanced Model Quality Alerts

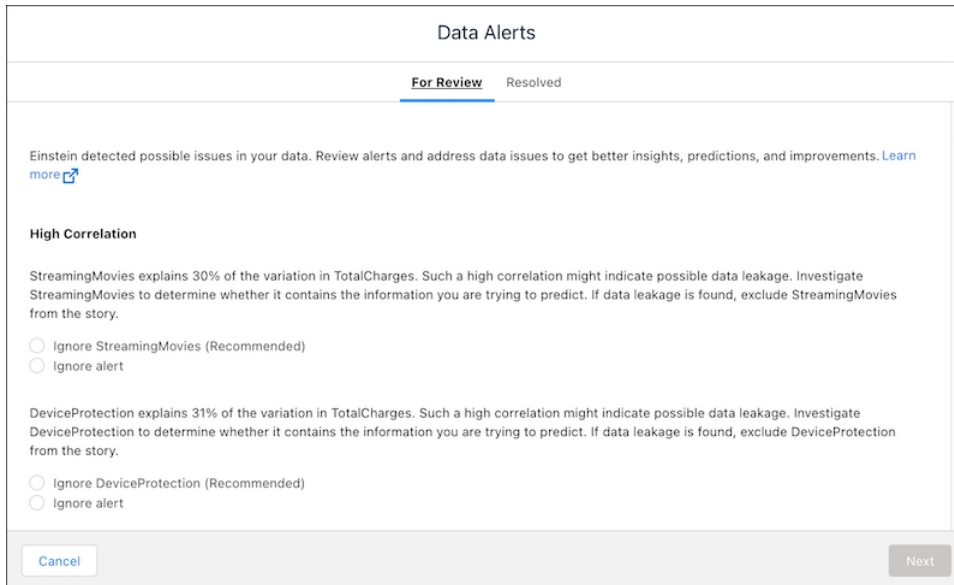
Automatic quality alerts direct you to augment model performance before deployment so that your model provides better insights, predictions, and improvements. Einstein Discovery alerts you to possible model quality issues by examining your training data and model metrics. Einstein now detects imbalanced distributions, possible data leakage, and no correlation issues in your training data. Einstein Discovery also checks certain quality metrics for your model and alerts you to any issues it detects. For linear regression models, Einstein Discovery flags low or high R^2 . For logistic regression models, Einstein Discovery flags low or high AUC (Area Under the Curve). Finally, you can now selectively choose to ignore specific alerts that you consider to not be relevant for your model.

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.

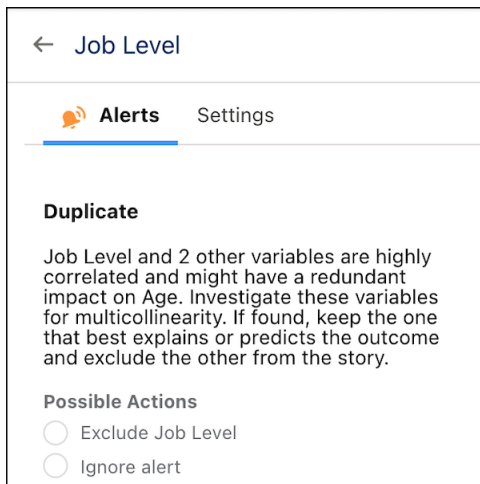
How: On the Story toolbar, choose **Review Alerts** to see model quality alerts for this story.



The new Data Alerts screen replaces the Recommended Updates screen. You can selectively ignore alerts that you don't need to fix. Ignored alerts show up on the Resolved tab.



Similarly, in story setup, if you select a variable with an alert, you can choose to ignore the alert.



To find alerts associated with model metrics, on the Story toolbar, click **Model**.

Overview

Predict MonthlyCharges

This analysis includes a predictive model, which means that Einstein has built a way to predict the value of **MonthlyCharges** based on other values in your data. Model metrics reveal quality measures and associated details for this regression model.

Use the information in this section to evaluate this model's ability to predict **MonthlyCharges**. When ready, deploy this model to Salesforce to predict **MonthlyCharges** in production.

Path to Deployment

Review Model Accuracy

How accurately does this model predict **MonthlyCharges** in your dataset?

R² ⓘ 0.9988

0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1

Random Chance Perfect Prediction

[View Model Evaluation](#)

Assess Deployment Readiness

Review quality and data alerts to assess the model's readiness for deployment.

Model Quality Check ⓘ
 Issues Detected

1

Data Alerts

🔔 23

[View All Alerts](#)

2

Look for possible issues detected (1) in the Assess Deployment Readiness panel on the Model Overview page. If issues were detected, click **View All Alerts** (2), and then examine the alerts related to model quality. This example alert indicates that data leakage possibly contributes to such a high-quality score.

Data Alerts

For Review

Einstein detected possible issues in your data. Review alerts and address data issues to get better insights, predictions, and improvements. [Learn more](#)

R² > 0.95

This high score indicates that the model performs so well that data leakage might be a factor. Investigate and remove any variables that are implicated in data leakage.

☐ Ignore alert

When you deploy a model, Einstein alerts you to unresolved quality issues.

Model Details

Einstein detected and automatically selected the model that was most recently deployed from a previous version of this story. How do you want to deploy this model? [Learn more](#)

☐ Add model to an existing prediction definition
☐ Deploy as a new model within a new prediction definition
☒ Update an existing model

Goal	Type	<div style="border: 2px solid orange; padding: 5px; display: inline-block;"> Model Quality Check ✖ Issues Detected </div>
Maximize MonthlyCharges	Regression	

Prediction Definition	Goal	Active Models	Object	Last Updated
<input checked="" type="radio"/> maximize monthly charges_	Maximize MonthlyC	Select ▾	Customer	March 24, 2021 at 1

Taking action on alerts requires you to create a story version.

Data Alerts

Describe This New Version

To help keep track of version updates, provide descriptive details about this new version.

Previous
Update Story

SEE ALSO:

[Salesforce Help: Model Quality Alerts \(can be outdated or unavailable during release preview\)](#)

Predict Outcomes for Multiple Categories with Multiclass Models (Pilot)

Einstein Discovery introduces multiclass models so that you can 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.

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: 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.

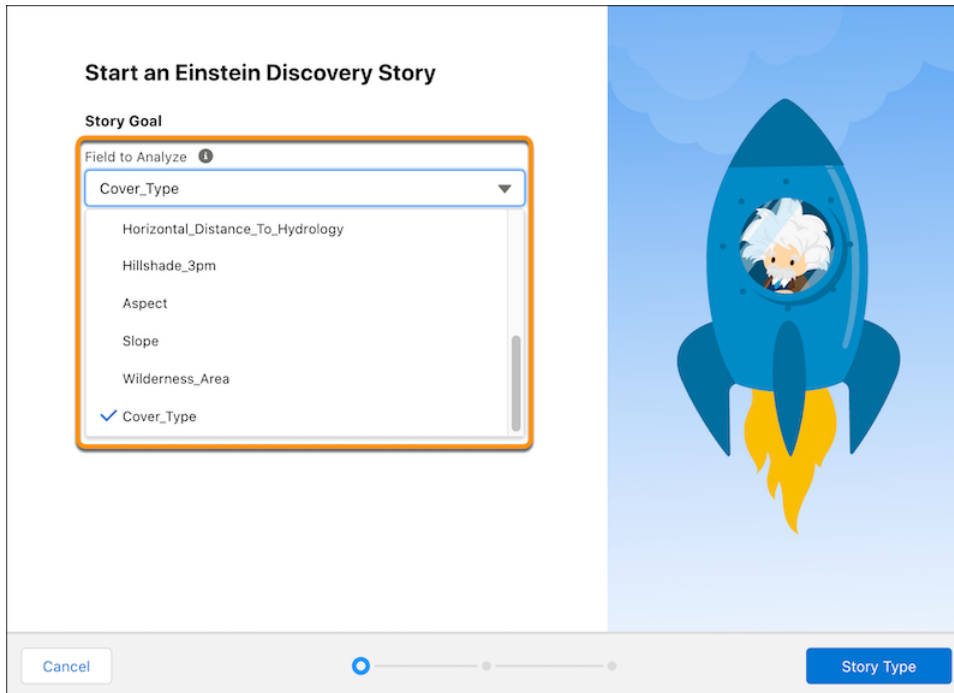
You can provide feedback and suggestions for this feature in the applicable IdeaExchange group in the [Trailblazer Community](#).

How: If you're interested in participating in the pilot program, ask your Salesforce Account Executive.

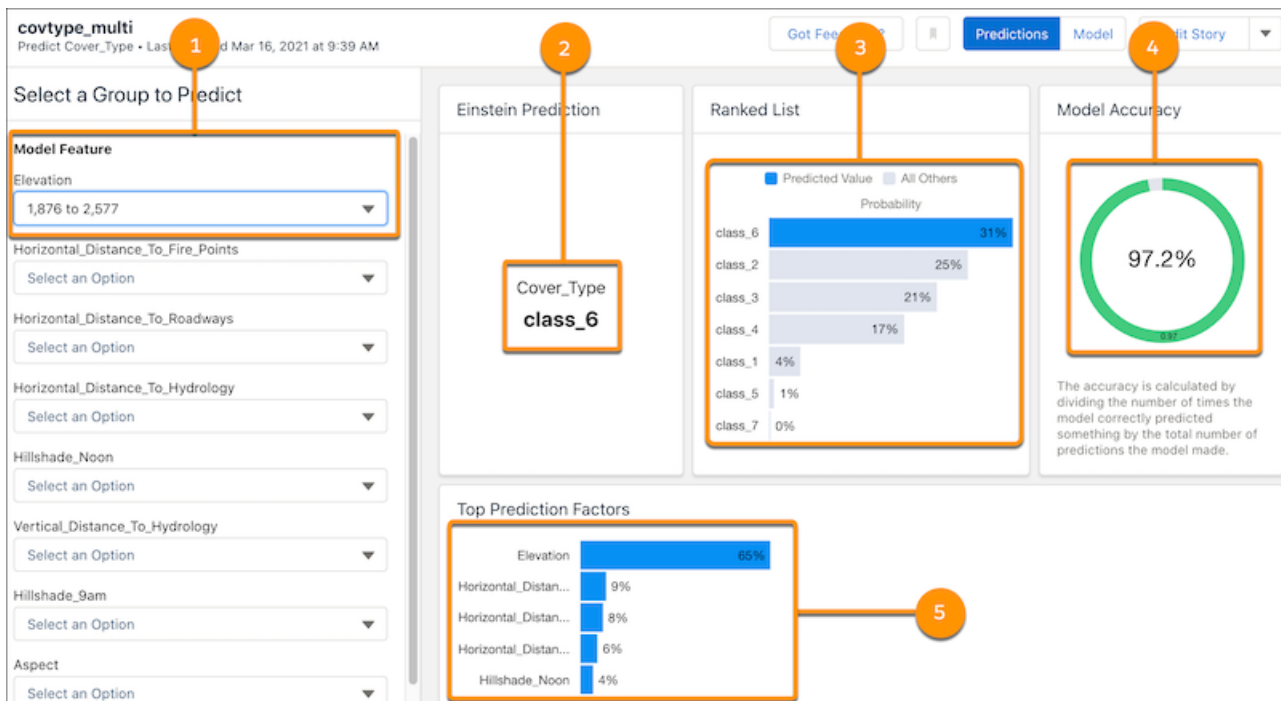
During story creation, in the Field to Analyze list, select a text column that contains 3–10 unique categories.



Note: Minimizing or maximizing an outcome pertains to numeric and binary classification use cases, but not to multiclass models.

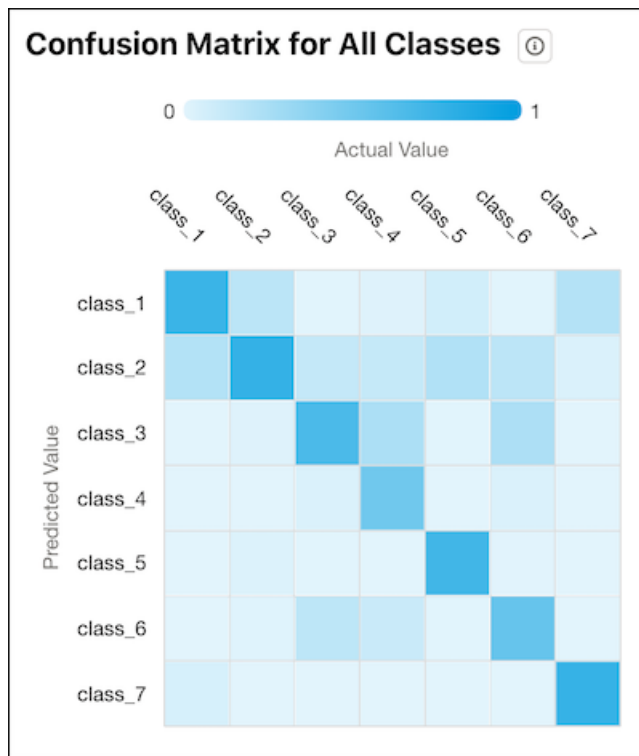


When the story is created, Einstein Discovery generates the predictive model and takes you to the Predictions tab. There, you can conduct what-if probability calculations for different classes and groups.



Select a group to predict (1). You see which class Einstein 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 all classes. For example, the Confusion Matrix for All Classes shows you, at a glance, how accurately the model predicts each class.



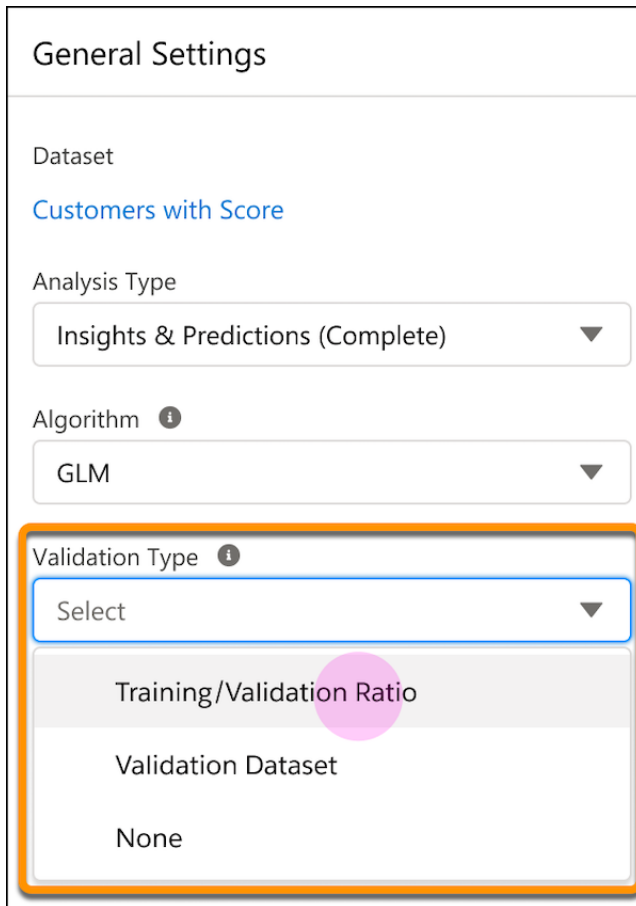
Where the row and column for each class intersect in the table, the color of the square indicates the model's accuracy. The legend shows a color progression from 0 to 1, with 1 representing 100% accuracy. In this example, the darker blue diagonal indicates a high percentage of true positives.

Evaluate Model Performance with Validation Sets

Validation sets give you a new way to simulate real-world performance and compare models for accuracy. A validation set has the same schema as the training dataset, but it contains a separate, independent collection of observations. If enabled in a story, Einstein runs the associated model on the data in the validation set. Einstein then calculates its accuracy by comparing the model's predicted outcomes with the actual outcomes in the validation set. Validation sets provide another way in which to test your model's performance so that you can more confidently deploy it in Salesforce.

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 story setup, on the General Settings panel, select a validation type.



General Settings

Dataset

Customers with Score

Analysis Type

Insights & Predictions (Complete) ▼

Algorithm ⓘ

GLM ▼

Validation Type ⓘ

Select ▼

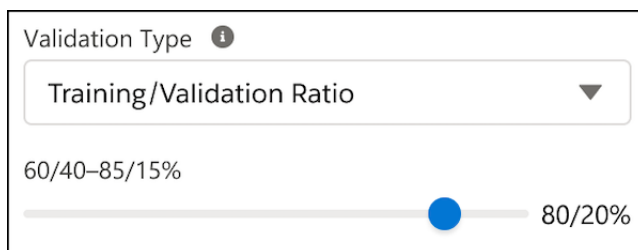
Training/Validation Ratio

Validation Dataset

None

You can define a validation set in two ways

- **Training/Validation Ratio** randomly splits the observations in the Tableau CRM dataset into a training set and a validation set. The default is 80% training and 20% validation, but you can adjust this percentage according to your needs.



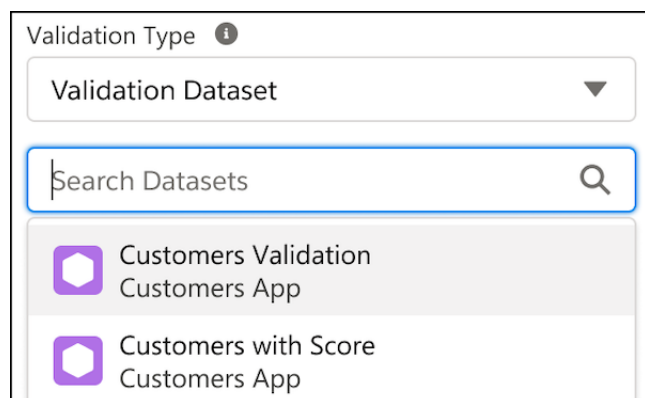
Validation Type ⓘ

Training/Validation Ratio ▼

60/40–85/15%

80/20%

- **Validation Dataset** specifies a separate Tableau CRM dataset that contains the validation data. You see only the datasets that match the schema of your story's dataset. Ideally, select a dataset that contains a diverse set of observations that reflect real-world conditions. If you want to compare models for accuracy, selecting the same validation dataset gives you a common, unbiased baseline for evaluation.



Create a story or story version. In Model Metrics, go to the Validation subtab on the Model Evaluation tab. Einstein shows statistics on how well the model performed on the validation set that you specified.

Overall Performance Gains and Lift Chart Validation Coefficients						
Validation Results						
Metric	Training Set	Validation Set Customers Validation	Cross Validation			
			All	Fold 1	Fold 2	Fold 3
Number of Rows	7033	7033	7033	1763	1713	1770
AUC	0.86	0.86	0.846	0.851	0.85	0.838
GINI	0.72	0.72	0.693	0.702	0.701	0.676
Log Loss	0.4	0.4	0.415	0.411	0.414	0.414
Mean Per Class Error	0.223	0.223	0.245	0.235	0.241	0.249


SEE ALSO:

[Salesforce Help: Edit General Settings for a Story \(can be outdated or unavailable during release preview\)](#)

Speed Up Story Creation with Smart Sampling (Pilot)

Analyzing a sufficiently representative subset lets you create stories and story versions faster and with confidence. Train your model with Smart Sampling for datasets of 300,000 rows or more. Select your sample data size and allow Einstein Discovery to create a story based on a randomly selected subset of observations in your data.

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:** 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](#).

How: If you are interested in participating in the pilot program, ask your Salesforce Account Executive.

In Story Settings from the General Setting panel, click **Smart Sampling**. Use the slider to define your dataset sample size.

Minimize Churn
Minimize Churn: Yes • Created Today at 11:11 AM

Story Settings
Customers

Search variables

Variables (14 of 18 Included)	Correlation ↓	Alerts	Transformation	Filters
<input checked="" type="checkbox"/> Churn Minimize	N/A			
<input checked="" type="checkbox"/> Contract	16.8%	Possible Duplicate X		
<input checked="" type="checkbox"/> Tenure	14.0%	Possible Duplicate X		
<input checked="" type="checkbox"/> OnlineSecurity	12.0%	Possible Duplicate X		
<input checked="" type="checkbox"/> InternetService	10.4%	Possible Duplicate X		
<input checked="" type="checkbox"/> PaymentMethod	9.2%			
<input checked="" type="checkbox"/> OnlineBackup	8.5%	Possible Duplicate X		
<input checked="" type="checkbox"/> DeviceProtection	7.9%	Possible Duplicate X		
<input checked="" type="checkbox"/> TotalCharges	6.7%			
<input checked="" type="checkbox"/> MonthlyCharges	5.9%	Possible Duplicates X		
<input checked="" type="checkbox"/> StreamingMovies	5.3%	Possible Duplicate X		
<input checked="" type="checkbox"/> StreamingTV	5.3%	Possible Duplicate X		

General Settings

Dataset: Customers

Analysis Type: Insights & Predictions (Complete)

Algorithm: GLM

Validation Option: Select

☒ Smart Sampling

250K-1M 500K

Rows in Story: 500,000

Get Reliable Insights from Unbalanced Data (Pilot)

Compensate for unbalanced data using the new Automatic Data Rebalancing option. It enables Einstein Discovery to view the data for more balanced analysis, and Einstein Discovery can synthetically tune the distribution for a more balanced dataset. Einstein Discovery can increase frequency in the minority class by upsampling the data and reduce frequency in the majority class through downsampling. Work with the data that you have without relying on external tools for this crucial data manipulation step.

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: 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](#).

Why: Let's say you want to train your data to predict customer churn. Your data has 1,000 rows, with one customer that churned and 999 that didn't. The imbalance in this dataset can't generate a reliable story. Previously, data was rebalanced outside of Salesforce and handled in a programmatic way using R or Python.

How: Open Story Settings and click the variable that's displaying an Imbalanced Distribution in the Alerts column.

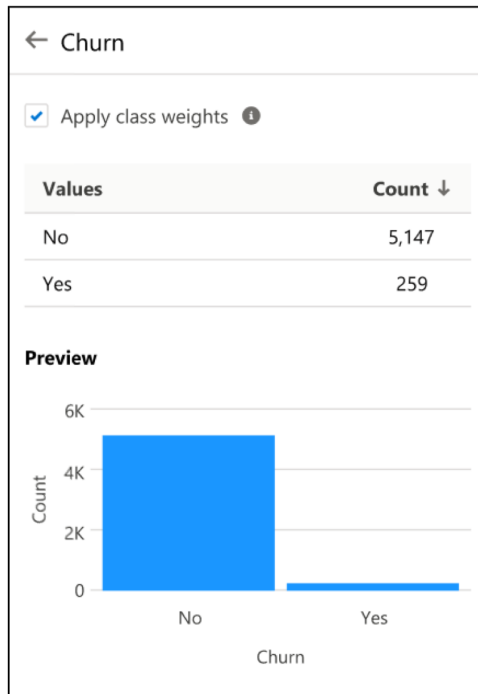
Minimize Churn
Minimize Churn: Yes • Created Today at 11:11 AM

Model Settings
Customers with Score

Variables (14 of 18 Included) Correlation ↓ Alerts

☒ **Churn** Minimize N/A Imbalanced Distribution X

Click **Apply class weights** to improve data distribution then update story.



SEE ALSO:

[Salesforce Help: Imbalanced Distribution Alert \(can be outdated or unavailable during release preview\)](#)

Get Diagnostic Insights with the Insights API

The Insights API allows you to embed diagnostic insights from your story into any website, application, or dashboard. Derived from historical data, diagnostic insights answer, Why did it happen? Previously, the Insights API returned only descriptive insights that answer, What happened with my data? Diagnostic insights drill deeper into correlations to help you understand which variables had the biggest impact on the business outcome you're analyzing. For example, Why did my sales increase during this quarter? or Why did case time to close increase in this region?

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: To access and run the API, you need the Use Einstein Discovery system permission.

SEE ALSO:

[Salesforce Help: Get Descriptive and Diagnostic Insights Programmatically \(can be outdated or unavailable during release preview\)](#)

Jump Start Intelligent Solutions Using Recipe-Powered Story Templates

Einstein Discovery story templates now use Data Prep recipes instead of dataflows to prepare your data for analysis and model training. Creating solutions from story templates lets you extend your implementations using the latest data wrangling capabilities that recipes have to offer, such as more join types and additional smart transformations.

SEE ALSO:

[Salesforce Help: Jumpstart Solutions with Story Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Should I Use a Recipe or Dataflow? \(can be outdated or unavailable during release preview\)](#)

Salesforce Data Pipelines

Build connections to sync pipeline data more easily.

IN THIS SECTION:


[Create External Data Connections Faster \(Beta\)](#)

All the features that let you bridge the data gap between Salesforce Data Pipeline and your remote systems have been redesigned for an optimal connection-building experience.

Create External Data Connections Faster (Beta)

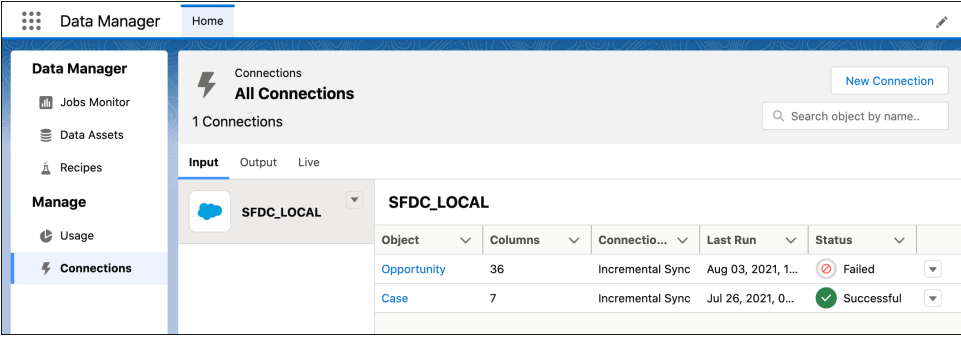
All the features that let you bridge the data gap between Salesforce Data Pipeline and your remote systems have been redesigned for an optimal connection-building experience.

Where: Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

 **Note:** As a beta feature, the new Connection section of the Data Manager is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for this feature in the [Trailblazer Community](#).

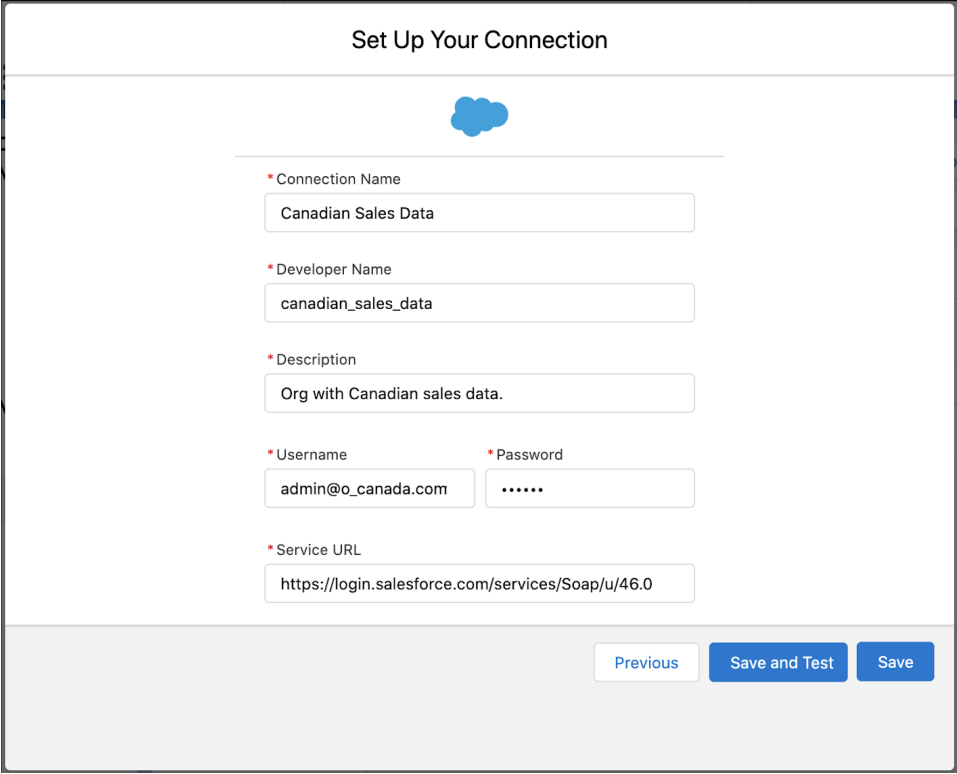
Who: Data Pipelines isn't available to Government Cloud customers.

Why: With the new Connections view, you can see the objects, columns, and details for each connection.




Object	Columns	Connection	Last Run	Status
Opportunity	36	Incremental Sync	Aug 03, 2021, 1...	Failed
Case	7	Incremental Sync	Jul 26, 2021, 0...	Successful

When you add a connection, the settings are reorganized with related fields, such as username and password, next to each other.



Set Up Your Connection



* Connection Name
Canadian Sales Data

* Developer Name
canadian_sales_data

* Description
Org with Canadian sales data.

* Username
admin@o_canada.com

* Password

* Service URL
https://login.salesforce.com/services/Soap/u/46.0

[Previous](#) [Save and Test](#) [Save](#)

SEE ALSO:

[Salesforce Help: Connect and Sync Your Data \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Modify and Enrich Salesforce Data with Recipes \(can be outdated or unavailable during release preview\)](#)

Tableau CRM for Everyone

New search pages on Tableau CRM Home provide options for exploration to help you find insights faster. With intelligent, self-service analytics, Ask Data for Salesforce (beta) guides you in answering your data questions.

IN THIS SECTION:

[Choose Your Search Experience \(Beta\)](#)

Search is blossoming with possibilities. New search pages in Tableau CRM give you options for exploration to help you find insights faster. You choose the simplest path to the analytics you want, whether that's traditional keyword search, semantic (data match) search, or natural language querying.

[Popularize Data-Driven Decision-Making with Ask Data for Salesforce \(Beta\)](#)

Entice your business users to answer their own data questions without prior data knowledge or even a dashboard. Ask Data for Salesforce brings intelligent, self-service analytics to the Tableau CRM home page. The Ask Data for Salesforce system works with your data and users' interactions to find the right data to answer natural language questions. The system also includes smart recommendations and Next Best Insight suggestions. All these features work together to make it easy and fun to discover data insights.

[Control Who Sees What in an App with Asset Visibility \(Generally Available\)](#)

App managers and editors can now hide select assets. Use Asset Visibility to manage the presence of sensitive assets, such as a dashboard in development or a raw dataset, from other app members.

[Find All Your Learning Resources on the Help Clearinghouse Page](#)

Update your Learning Map bookmark to point to the redesigned Tableau CRM page in Help. We're deprecating the old Learning Map and moving its entire collection of links into Salesforce Help, which is more secure, searchable, and easily localized.

Choose Your Search Experience (Beta)

Search is blossoming with possibilities. New search pages in Tableau CRM give you options for exploration to help you find insights faster. You choose the simplest path to the analytics you want, whether that's traditional keyword search, semantic (data match) search, or natural language querying.

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: 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 access the search experience beta feature, users need the Use Metalytics API user permission. This permission is enabled by default with the Tableau CRM Plus license.

How: From Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. On the Settings page, select **Enable Ask Data for Salesforce**.

In the search bar on Analytics Home, enter search terms, or ask a question about your business.

Analytics

Home

Notifications

Watchlist

Browse

All Items

Favorites

Shared With Me

Created By Me

Collections +

Create a collection to start organizing your analytics content.

Search

Create

Q open cases

Search Results 1

4 View All (8)

Title	Type	Location	Created By	Last Modified By	Last Modified	Data Refreshed
Prioritized Open Cases	Dashboard	Old- Wave for ...	Elliott Mango	Elliott Mango	9/20/2016, 3:04 PM	
Sample Report: Open Cases By Priority	Report	Wave PM	Admin User	Marko Koosel	10/24/2017, 2:45 PM	10/24/2017, 2:45 PM
Sample Report: Cases Status by Rep	Report	Wave PM	Admin User	Admin User	1/17/2016, 4:49 PM	1/17/2016, 4:49 PM
Oldest Open Cases	Report	Communities R...	Elliott Mango	Elliott Mango	3/16/2021, 7:33 AM	3/16/2021, 7:33 AM
Service Open Cases	Dashboard	Service Analyti...	Darlene Tam	Elliott Mango	12/28/2020, 10:45 AM	
Service By Open Cases	Dashboard	Old- Wave for ...	Elliott Mango	Darlene Tam	9/16/2016, 4:23 PM	
Cases Opened	Report	Communities R...	Elliott Mango	Elliott Mango	3/16/2021, 7:33 AM	3/16/2021, 7:33 AM
Accounts with Open Cases Joined Report	Report	Sales Manager ...	Anusha Surepeddi	Anusha Surepeddi	5/5/2020, 12:56 PM	5/5/2020, 12:56 PM

Insight based on ServiceCase, used in [Winter 21] Embedded 2

5 More Insights

Count of Rows by Case Reason

Count of Rows ↓

Case Reason	Count of Rows
Complex functionality	9.2k
Instructions not clear	7.3k
New problem	6.7k
N/A	6k
User didn't attend training	5.6k
Existing problem	4.7k
Setup and Usage	1.7k

Items Related to ServiceCase 3

Title	Type	Location	Created By	Last Modified By	Last Modified	Data Refreshed
[Winter 21] Embedded	Dashboard	Service Analyti...	Elliott Mango	Elliott Mango	9/3/2020, 9:51 AM	1/15/2021, 3:45 PM
3 - Agent Performance Dashboard	Dashboard	Dreamforce 2018	Elliott Mango	Elliott Mango	9/9/2018, 6:23 PM	1/15/2021, 3:45 PM
Agent Performance Dashboard DEMO	Dashboard	Dreamforce 2018	Danny Lai	Danny Lai	10/1/2018, 9:51 AM	1/15/2021, 3:45 PM
Agent Performance Dashboard - start	Dashboard	Dreamforce 2018	Danny Lai	Danny Lai	9/25/2018, 5:30 AM	1/15/2021, 3:45 PM
BACKUP of Agent Performance Dashboard - start	Dashboard	Dreamforce 2018	Danny Lai	Danny Lai	9/24/2018, 11:01 AM	1/15/2021, 3:45 PM

The new Search page opens with three sections: Search Results that are keyword matches (1), the top Insight based on the data selected to answer your question (2), and Items related to the insight (3).




To open the Search Results page, click **View All** (4). Access the full list of results or continue with keyword searching. Filter using the options in the Filters panel.

Search > Search Results

Create

open cases

3 Items

Title	Type	Location	Created By	Last Modified E	Last Modified	Data Refreshes
 Sample Report: Cases Status ...	Report	Salesfo...	Admin User	Admin User	1/25/2021, 1:...	1/25/2021, 1:...
 Sample Report: Open Cases B...	Report	Salesfo...	Admin User	Admin User	1/25/2021, 1:...	1/25/2021, 1:...
 Service Open Cases	Dashb...	Service...	Admin User	Admin User	3/11/2021, 9:...	

Filters

Reset Filter

Date Created

After

1/25/2021

Before

3/12/2021

Include

☐ App

☐ Dashboard

☐ Story

☐ Lightning Dashboard

☐ Report

☐ Lens

☐ Dataset

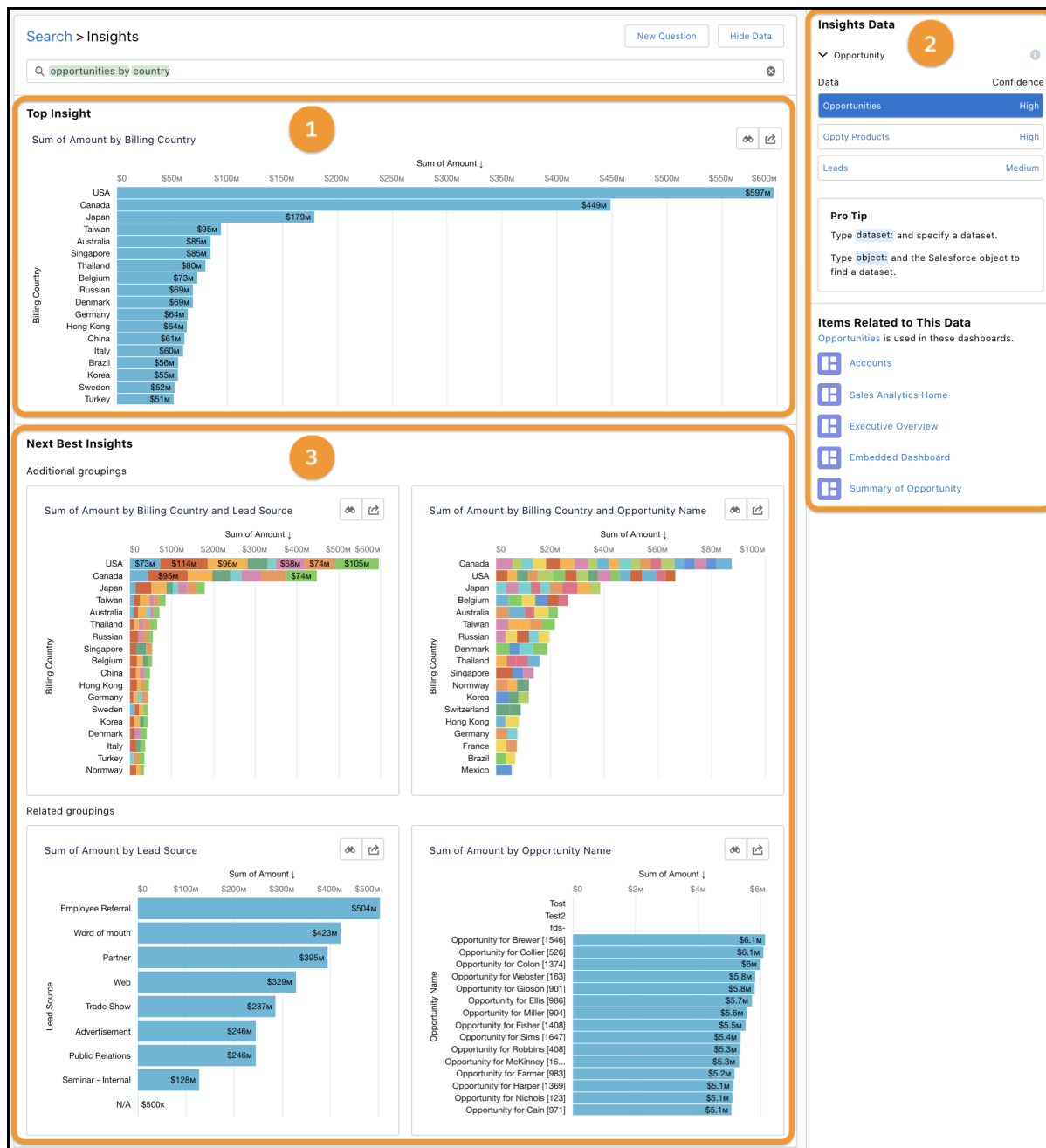
☐ Lightning Report Folder

☐ Lightning Dashboard Folder

Created By

☐ Admin User

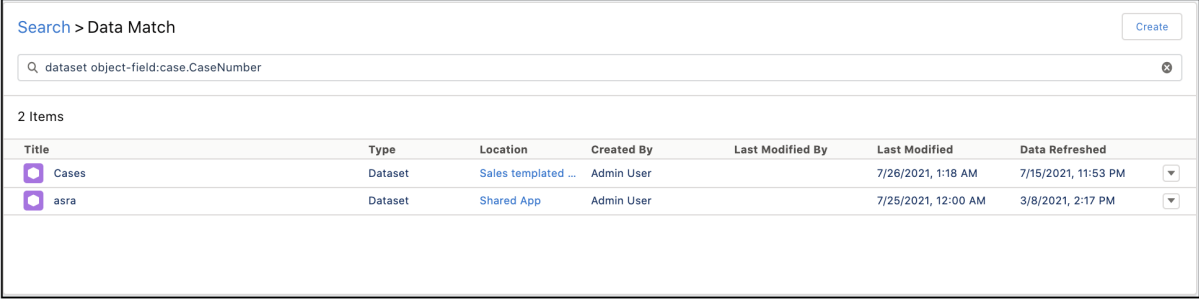
To go back to the main Search page, click **Search** in the page title. On the main Search page, open the Insights page by clicking **More Insights** (5).





In addition to the Top Insight (1), you can check out the Insights Data (2) that was selected to answer your question. The Next Best Insights section (3) is a prediction service that suggests ideas for further exploration with additional and related groupings of the data. To learn about the insights and how to explore them, see [Popularize Data-Driven Decision-Making with Ask Data for Salesforce \(Beta\)](#) on page 156.

Take action from any insight. Click Share to post to Chatter, export to Salesforce Anywhere (Quip), or download the insight. Click Explore to open the insight in the explorer, where you can change the visualization. If you're in Analytics Studio, you can also save it or clip it to a dashboard.

To open the Data Match page, enter semantic search terms in the search bar. Use semantic search to find dashboards and datasets based on the data they use.



Title	Type	Location	Created By	Last Modified By	Last Modified	Data Refreshed
 Cases	Dataset	Sales templated ...	Admin User		7/26/2021, 1:18 AM	7/15/2021, 11:53 PM
 asra	Dataset	Shared App	Admin User		7/25/2021, 12:00 AM	3/8/2021, 2:17 PM

SEE ALSO:

[Salesforce Help: Find Tableau CRM Assets and Insights \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Find Dashboards and Datasets by Field Using Semantic Search \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Ask Data for Salesforce \(Pilot\)\(can be outdated or unavailable during release preview\)](#)

Popularize Data-Driven Decision-Making with Ask Data for Salesforce (Beta)

Entice your business users to answer their own data questions without prior data knowledge or even a dashboard. Ask Data for Salesforce brings intelligent, self-service analytics to the Tableau CRM home page. The Ask Data for Salesforce system works with your data and users' interactions to find the right data to answer natural language questions. The system also includes smart recommendations and Next Best Insight suggestions. All these features work together to make it easy and fun to discover data insights.

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: 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](#).

Contact Salesforce Support to enable the feature.

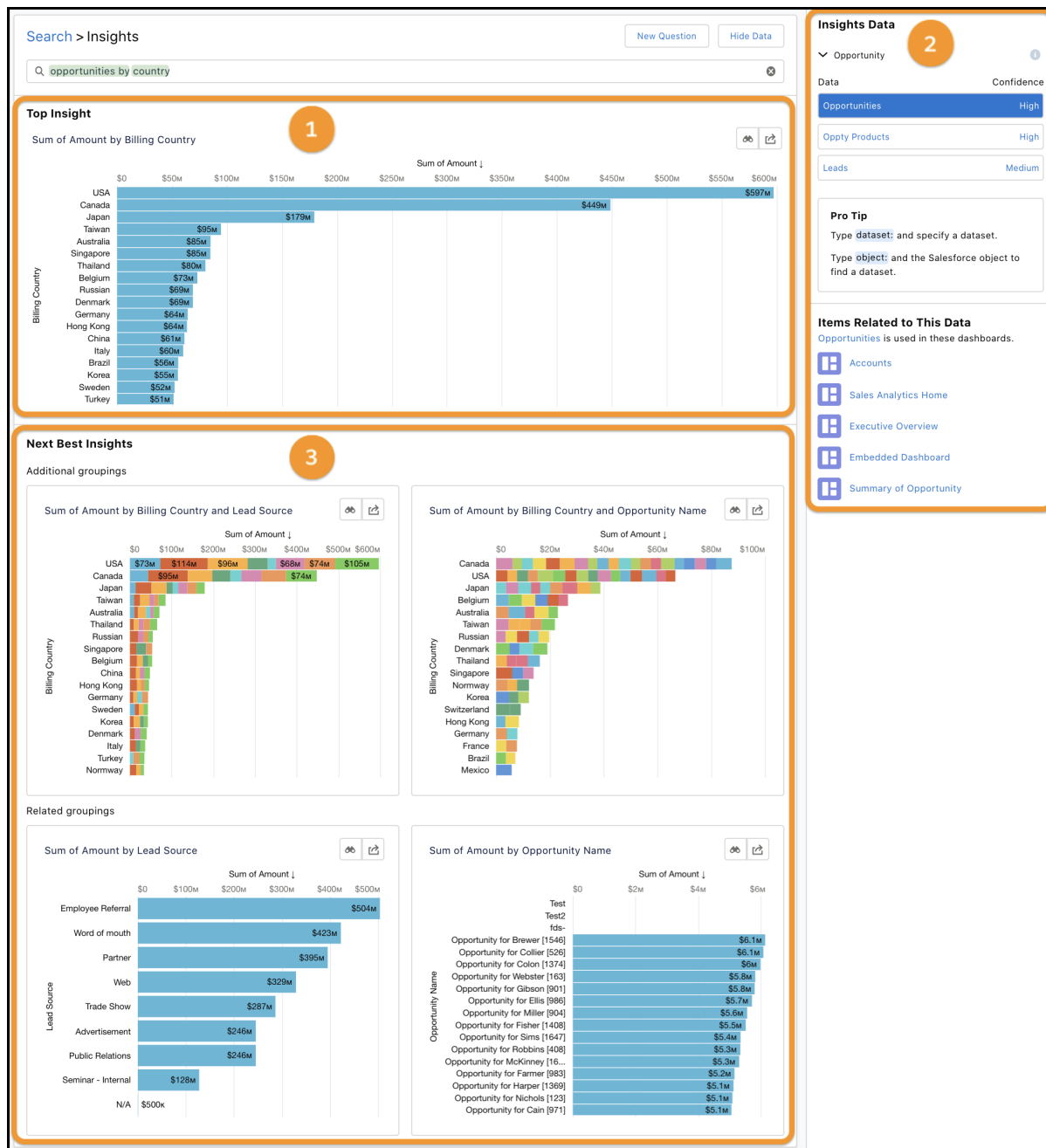
Why: We integrated Ask Data for Salesforce into the search experience to make self-service analytics available for all users. Users can start with a question, not with a dashboard. They can simply suggest a grouping or filter, unlike before when knowing a dataset's fields was necessary. Ask Data for Salesforce surveys your org to learn data relationships and the vocabulary of your business. It also uses word association feedback to train the natural language system so that all your users benefit. With org-specific, self-training models, virtually no admin setup time is needed.



Note: The same data governance that you expect from Salesforce is built into Ask Data for Salesforce. Security and sharing rules are fully respected. All models are built specifically for each Salesforce org and only that org. Your data never leaves our secure data centers. Also, Ask Data for Salesforce services don't affect your data or API usage limits.

How: From Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. On the Settings page, select **Enable Ask Data for Salesforce**.

Enter a data question in the search bar, and the new Search page opens. For more information about search, see [Choose Your Search Experience \(Beta\)](#) on page 152. To open the Insights page, click **More Insights**.



The Top Insight (1) is the Ask Data for Salesforce interpretation of your question as a data query, presented in an automatically generated visualization. Did we understand your question? Look to the Insights Data panel (2) for information about the data selected to answer your question. And check out the Next Best Insights (3), an analytics prediction service that suggests related questions to help you discover the most relevant and valuable information.

Insights Data

▼ Opportunity 1 i

Data 2 Confidence

Opportunities High

Oppty Products High

Leads Medium


Pro Tip


Type **dataset:** and specify a dataset.


Type **object:** and the Salesforce object to find a dataset.


Items Related to This Data


[Opportunities](#) is used in these dashboards.

 [Accounts](#)

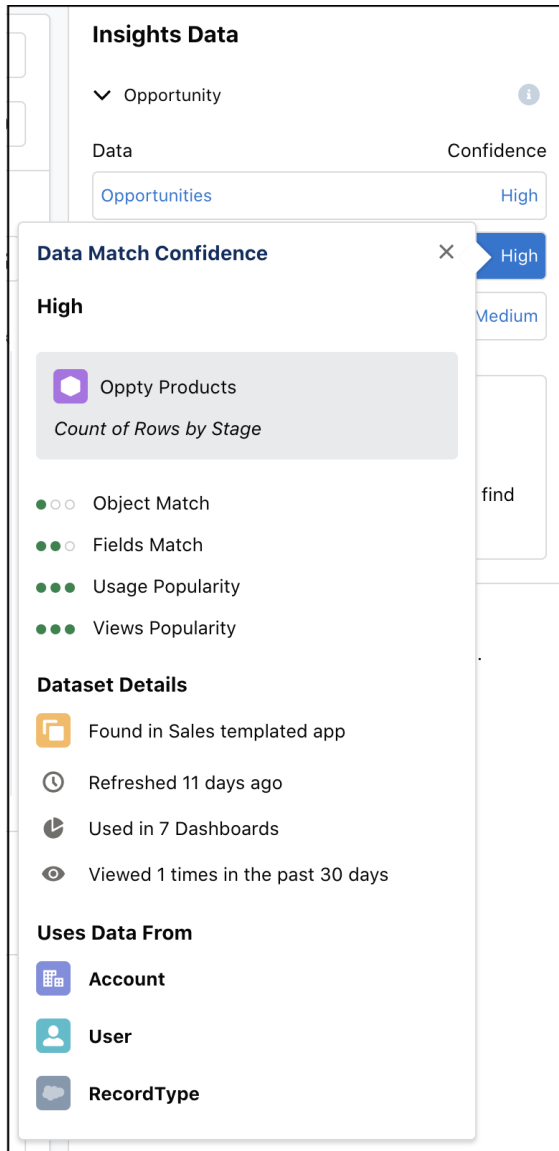
 [Executive Overview](#)

 [Sales Analytics Home](#)

 [Summary of Opportunity](#)

 [Embedded Dashboard](#)

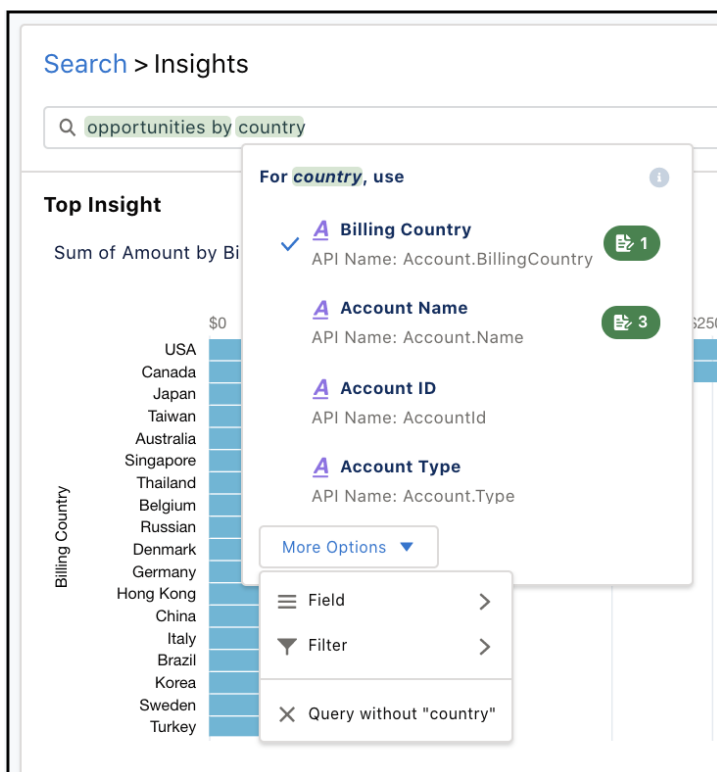
The Insights Data panel lists the report type used to help identify the data that answers your question (1) and the datasets with the highest confidence (2). The dataset queried is highlighted. Click the name of another dataset to use it as the basis of the query. Automatically, the Top Insight and Next Best Insights are reconfigured to show answers using the data that you select.




In the Insights Data panel, you can also click the confidence level on a dataset to view more information about it. Confidence is determined by algorithm scores for data matches, popularity measures, and natural language interpretation. The dataset details and related objects can help you verify that we're using the data that you expect.

Alternatively, if you know the data, you can specify it by adding `dataset:[developerName]` or `object:[developerName]` to your question in the search bar.

Notice that some words in your question are highlighted. Highlighted words are associated with a field or value in the data that we're using to answer your question. If you want to change the association, click the word to open the menu.



In the menu, the field with a checkmark is the one used in the data query configured from your question. Each time you or anyone in your org selects a field or value to associate with a word or phrase, Ask Data for Salesforce learns your business's language. The numbers next to some fields indicate how many times people in your org have associated them with the highlighted word. These numbers can help you make the right selection.

 **Note:** Any word in your question can be associated with a data element. You can also select more than one word to assign the phrase to a data element.

SEE ALSO:

[Salesforce Help: Smart Recommendations \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Find Dashboards and Datasets by Field Using Semantic Search \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Ask Data for Salesforce \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

[Blog: Autonomous Insights](#)

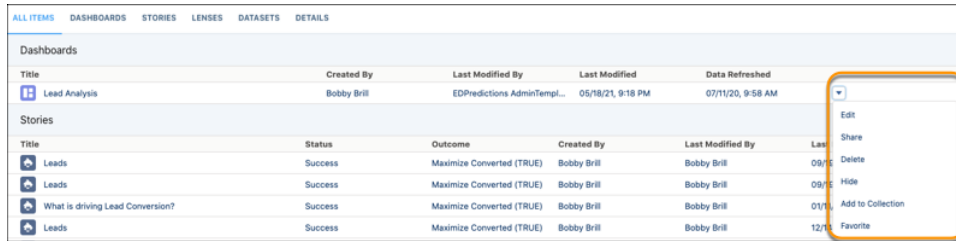
[Blog: A new search-driven analytics experience with Ask Data for Salesforce](#)

Control Who Sees What in an App with Asset Visibility (Generally Available)

App managers and editors can now hide select assets. Use Asset Visibility to manage the presence of sensitive assets, such as a dashboard in development or a raw dataset, from other app members.

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: App managers can toggle an asset's status to control visibility by clicking the row-level action dropdown menu for the asset and clicking **Hide**.



ALL ITEMS DASHBOARDS STORIES LENSES DATASETS DETAILS					
Dashboards					
Title	Created By	Last Modified By	Last Modified	Data Refreshed	
Lead Analysis	Bobby Brill	EDPredictions AdminTemp...	05/18/21, 9:18 PM	07/11/20, 9:58 AM	
Stories					
Title	Status	Outcome	Created By	Last Modified By	Last Modified
Leads	Success	Maximize Converted (TRUE)	Bobby Brill	Bobby Brill	09/12
Leads	Success	Maximize Converted (TRUE)	Bobby Brill	Bobby Brill	09/12
What is driving Lead Conversion?	Success	Maximize Converted (TRUE)	Bobby Brill	Bobby Brill	01/12
Leads	Success	Maximize Converted (TRUE)	Bobby Brill	Bobby Brill	12/12

Asset changes affect app members that are assigned with Viewer sharing access. Assets remain visible to app users with Manager or Editor sharing access regardless of the asset's status. Users with Manager or Editor sharing access can control asset visibility.

Find All Your Learning Resources on the Help Clearinghouse Page

Update your Learning Map bookmark to point to the redesigned Tableau CRM page in Help. We're deprecating the old Learning Map and moving its entire collection of links into Salesforce Help, which is more secure, searchable, and easily localized.

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: The Help page at <https://help.salesforce.com/articleView?id=sf.bi.htm> is now your one-stop clearinghouse for all Tableau CRM onboarding resources.

TABLEAU CRM

Pathways Into Tableau CRM

1

Get Started	Enable & Integrate	Build & Produce
Tableau CRM for Business Users	Set Up the Platform	Explore & Visualize Data
Tableau CRM on Mobile	Prepare & Integrate Data	Build Tableau CRM Dashboards
		Manage & Share Tableau CRM in Apps
		Add Intelligence

Extend & Develop	Learn More...	and More
Embed & Customize Tableau CRM	Trailhead	Trailblazer Community
Deploy Tableau CRM Prebuilt Apps	In-App Video Series	Live Training
Develop on the Platform	Training Videos	Best Practices
	Webinar Recordings	Trailblazer Content

2

Learning Resources for Every Step of Your Tableau CRM Journey

GET STARTED

Get To Know Tableau CRM	Personalize Your Experience	Take Actions & Share
Tableau CRM Home Overview	Watchlist: Quick Look	Take Action from Tableau CRM
Tableau CRM Basics	Subscriptions: Quick Look	Collaborate with Annotations
Home Page Actions	Converse with Your Data	Present Live Dashboards
Learn What You Can Do with Tableau CRM	Filter & Take Action within Tableau CRM	Set & Send Smart Notifications
Run Apps	Save Your Filtered View of a Dashboard	Share Dashboards, Widgets, & Lenses
Dashboard Navigation Basics	Favorite Assets in Tableau CRM Home	Download & Share Images & Data
		Create PDFs & Print Dashboards

Go Mobile with Tableau CRM

- [Tableau CRM Mobile Exploration](#)
- [Get Started with Mobile Analytics](#)
- [Mobile Experience Guide](#)
- [Tableau CRM for iOS](#)
- [Tableau CRM for Android](#)

ENABLE & INTEGRATE

Enable Tableau CRM	Bring In Your Data	Prepare Your Data
Learn Tableau CRM Admin Basics	Data Integration Basics	Dataflow or Recipe: Help Me Choose
Enable Tableau CRM Features	About Datasets	Prepare & Load Data into Datasets with Recipes & Dataflows
	Integrate Local & Remote Data	Get Started with Data Prep

Start at the top for a streamlined map (1) of top-level Help pages arranged by jobs to be done, plus links to Trailhead, in-app videos, and all the training videos, webinars, and best practices blogs by Tableau CRM experts. Scroll down for learning resources that cover every aspect of Tableau CRM (2).

Analytics Mobile Apps

Access insights without internet in Tableau CRM for iOS (now generally available). Organize your favorite insights with Collections in both Tableau CRM for iOS and Android. Plus, work faster with one-click actions in Tableau CRM for iOS, and see images in tables in Tableau CRM for Android.

IN THIS SECTION:

[Access Data When You're Offline \(Generally Available\)](#)

View and analyze data on your mobile device without internet access. This feature is now generally available.

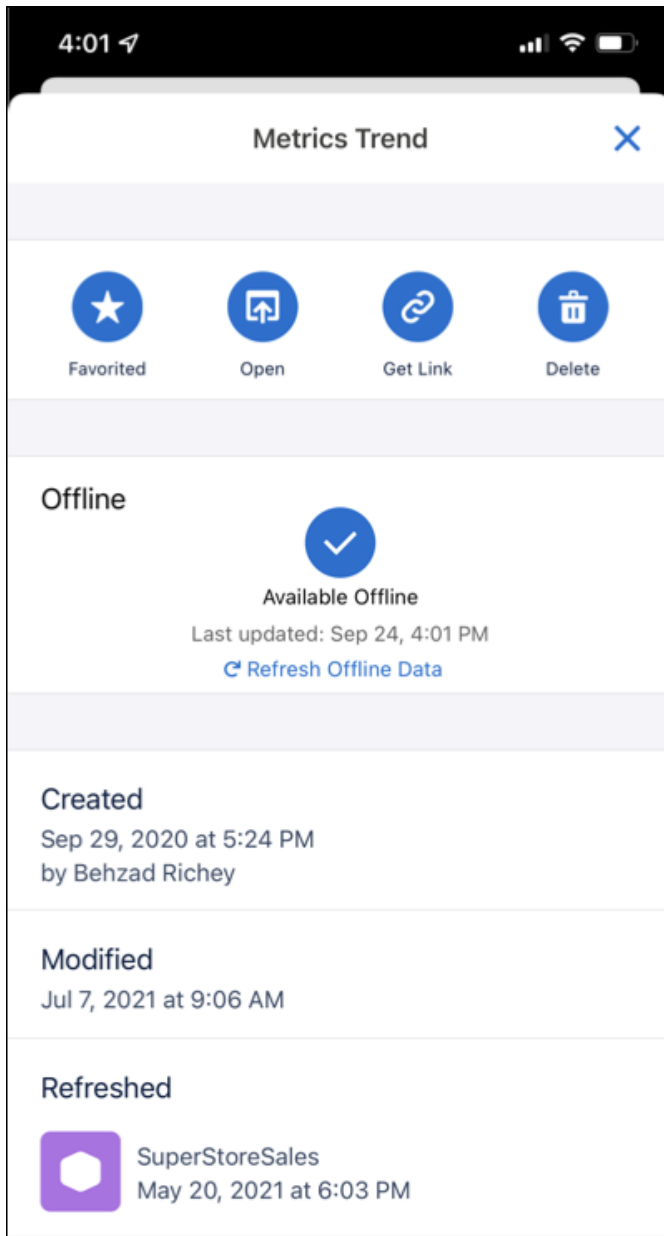
[Get the Latest Version of Tableau CRM for iOS and Android](#)

To benefit from the latest enhancements and bug fixes, upgrade to version 14.2 of Tableau CRM for iOS and Android.

Access Data When You're Offline (Generally Available)

View and analyze data on your mobile device without internet access. This feature is now generally available.

Where: This change applies to Lightning Experience and Tableau CRM for iOS 14.0 and higher. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



How: Offline access is enabled by default. To enable or disable offline access for mobile users, from Setup, enter *Analytics* in the Quick Find box, then select **Settings**. Click the box next to **Enable Mobile Offline**, and then click **Save**.

SEE ALSO:

[Salesforce Help: Access Data When You're Offline](#)

Get the Latest Version of Tableau CRM for iOS and Android

To benefit from the latest enhancements and bug fixes, upgrade to version 14.2 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 14.2.
 - Find data faster in tables. Now you can sort tables in dashboards by tapping the column headers.
 - Bug fixes and usability enhancements.
- New in version 14.1.
 - Bug fixes.
- New in version 14.0.
 - Offline: Access your insights from anywhere, even when you're not connected (Generally Available).
 - Get work done faster on your mobile device with one-click actions (Generally Available).
- New in version 13.2.
 - Organize and easily access insights even if they're spread across multiple apps with Tableau CRM Collections.
 - Get work done faster on your mobile device with one-click actions.
 - Bug fixes.

Check out what's new in Tableau CRM for Android.

- New in version 14.2.
 - Keep your favorite data discoveries. Now you can save your data explorations as a lens.
 - Get work done faster on your mobile device with one-tap actions.
 - Use pivot tables on mobile with support for formatting and multiple measures.
 - Bug fixes and usability enhancements.
- New in version 14.1.
 - Create Collections and add your favorite insights directly from your Android device.
 - Bug fixes and usability enhancements.
- New in version 14.0.
 - Bug fixes and usability enhancements.
- New in version 13.2.
 - Get a complete picture from your data with images in tables.
 - Organize and easily access insights even if they're spread across multiple apps with Tableau CRM Collections.
 - Bug fixes.

SEE ALSO:

[Access Data When You're Offline \(Generally Available\)](#)

Commerce

Commerce Cloud enhancements include new and updated features for B2B Commerce on Lightning Experience, B2B2C Commerce, Salesforce Order Management, and Omnichannel Inventory.

IN THIS SECTION:[B2B Commerce on Lightning Experience](#)

B2B Commerce on Lightning Experience includes new promotion functionality and the ability to import products on a global level for all stores. This release also includes an enhanced checkout flow and support for fractional product quantities.

[B2B2C Commerce](#)

Enhancements for B2B2C Commerce include the ability to import products at a global level and recommend products to shoppers based on site-wide purchase behavior. You can also work more efficiently with workspaces and display the most relevant facets for search.

[Salesforce Order Management](#)

Modernize the Salesforce B2B Commerce order experience with Salesforce Order Management. Improve shopper satisfaction with the new reship feature for handling lost or missing items. Apply Salesforce duplicate and matching rules to shopper records from Salesforce B2C Commerce order data.

[Omnichannel Inventory](#)

Enhancements to Omnichannel Inventory include the ability to access headless APIs using your Salesforce org credentials.

B2B Commerce on Lightning Experience

B2B Commerce on Lightning Experience includes new promotion functionality and the ability to import products on a global level for all stores. This release also includes an enhanced checkout flow and support for fractional product quantities.

IN THIS SECTION:[Use Promotions to Drive B2B Commerce on Lightning Experience](#)

Increase revenue in your B2B store with promotions that encourage more orders. Offer automatic discounts for specific products, product categories, or other attributes. Target your promotions to make sure the right buyers receive the right savings. Then, use Experience Builder to customize how your promotions show to eligible buyers.

[Customize Your B2B Store's Checkout Experience with an Enhanced Checkout Flow](#)

The enhanced checkout flow is designed as a single synchronous flow. It's easier to understand and to customize, and it runs faster than before.

[Add Fractional Product Quantities](#)

Support buyers who want to order products in fractional quantities, such as 1.5 tons of cement or 1.25 kilos of apples. Use fractional quantities with up to four decimal places to define the minimum and maximum amounts of a product that a customer can buy. Fractional quantities are visible when a buyer searches for a product, views the product's details, and adds the quantity to the cart.

[Define and Select Product Quantities with the Quantity Selector](#)

Buyers can now view quantity rules, select quantities, and add products directly to their carts from the pages where they find them. Previously, buyers left the Category Detail or Search Results pages to go to the Product Details page to add items to their cart.

[Import Products at the Global Level](#)

Use a CSV file to import products that aren't associated with a particular B2B or B2C store. In the product import CSV file, you can specify products and variations, categories, entitlement policies, and prices for multiple price books. After the import, you can use the products for any store.

[Edit and View Workspaces More Efficiently](#)

Save time when configuring products, pricing, and promotions by editing fields inline directly in your workspace. You can edit boolean, number (int, long, and double), phone, text, and url fields. You can edit multiple fields in up to 200 rows at a time. You can also filter the list of items using up to two cross-entity filters. These enhancements apply to the product, promotion, and pricing workspaces.

[Create a B2B Store on an Existing Experience Cloud Site](#)

You don't have to create a store on a new site. You can reuse domain and site settings, branding, and styling to present an integrated experience to your users. When you add a store, the existing site template, pages, components, and navigation stay the same, but you can add commerce pages and components. You can create a store on any site that doesn't already have a store, that's using the Aura framework, and that's using either the Customer Portal template (CPT), Starter template, or B2B template.

[Use Modular Components on the Product Detail Page](#)

Customize and reduce the time to configure product options on the Product Detail page with the new Image Detail, Breadcrumbs, Product Heading, and Purchase Options modular components. With the new modular components, use only the components that you need rather than the out-of-the-box Product Detail Card component. Existing customers can still use the Product Detail Card component, but any customization requires rebuilding the component.

[Automatically Display the Most Relevant Facets for B2B Commerce Search](#)

Automatically select, order, and display the 10 most-relevant facets, including the Category facet, based on Search results.

[Customers Can View About 5,000 Results per Search Request in B2B Commerce Search](#)

Regardless of how many results that the Commerce Search engine returns, it limits the number of viewable results to 5,000 after showing the first results page. For example, with a setting of 20 results per page, after the first page, Search provides 250 more pages of 20 products each, for a total of 5,020 viewable results. An error message appears when a customer attempts to view products beyond page 251.

[Rebuild the Search Index up to 60 Times per Hour in B2B Commerce Search](#)

You can rebuild the search index up to 5 times per hour for individual storefronts, and up to 60 times per hour for all storefronts in an org.

[Search Indexes Deleted After 60 Days of Inactivity for B2B Commerce Search](#)

To conserve resources, storefront indexes that have no search activity for 60 consecutive days are deleted. To reactivate search, you must rebuild the index.

[Set Up Your Org for Commerce More Easily](#)

New guides in PDF format take you through preparing and setting up your org for B2B Commerce for Lightning Experience or B2B2C Commerce. We also have a new guide that includes just the setup steps for Salesforce admins who want to add B2B2C Commerce to B2B Commerce for Lightning Experience.

[Modernize the B2B Commerce Order Experience with Salesforce Order Management](#)

Modernize the entire B2B Commerce order lifecycle from purchase through fulfillment and order servicing by implementing Salesforce Order Management. Manage orders from any channel, and create integrated buying experiences across channels by centralizing order, inventory, product, and customer data. Streamline order servicing with a self-service storefront for shipment tracking, invoice management, cancellations, and returns.

[Resume Shopping Without Canceling Checkout](#)

Now carts unlock automatically for buyers who abandon a checkout process, so they can pick up right where they left off. Previously, to continue shopping, buyers unlocked their carts manually. With this enhancement, consider reviewing your extensions or other customizations to make changes, if necessary.

[Add a Buyer Group Related List to Your Account Record Pages](#)

The Buyer Group related list shows the buyer groups associated with the account. You can assign or remove accounts from buyer groups directly from the related list.

[Use Buyer Group User Permissions to Share Access to Buyer Group Members](#)

New user permissions control access to buyer group members. Access to a buyer group member is now determined by a user's access to the member's buyer group.

[Create Secondary Carts Using the Connect API](#)

Use the Connect API to create multiple active carts for the same buyer. To use this feature, you have to build your own front end as a custom solution.

[See Only Categories with Entitled Products When Browsing Categories](#)

When browsing product categories on the storefront, buyers and guest users only see a category's entitled products. If a category has no entitled products, it also doesn't display on the storefront.

[Use the Organization-Wide Defaults Sharing Setting to Control Access to Products](#)

A new Organization-Wide Defaults (OWD) setting is now available for Product records.

[Display All Category Navigation Menu Items](#)

When you use a data source to define the menu categories, there's an additional menu item for all categories. If you manually add a category menu item, the parent of the category menu doesn't include a menu item for all categories.

[Give Buyers a Complete View of Their Account's Order History](#)

The Order List component now shows all orders visible to the current buyer, placed in the current storefront, and related to the current account. Depending on your security settings, this component can include orders placed by other buyers on the account. Previously, buyers saw only the orders that they placed. We recommend that you review your security settings to make sure that buyers have only the required access.

Use Promotions to Drive B2B Commerce on Lightning Experience

Increase revenue in your B2B store with promotions that encourage more orders. Offer automatic discounts for specific products, product categories, or other attributes. Target your promotions to make sure the right buyers receive the right savings. Then, use Experience Builder to customize how your promotions show to eligible buyers.

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

Who: This change is available for users with a B2B Commerce for Lightning Experience license.

How: Create and manage your promotions in the Promotion Workspace. If your organization uses a single currency only, you can try the simplified create flow. Configure display properties on the Promotions, Cart, Cart Totals, Order Summary Products, and Order Summary Promotions components in Experience Builder.

SEE ALSO:

[Manage Promotions with the Promotion Workspace \(can be outdated or unavailable during release preview\)](#)

Customize Your B2B Store's Checkout Experience with an Enhanced Checkout Flow

The enhanced checkout flow is designed as a single synchronous flow. It's easier to understand and to customize, and it runs faster than before.

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

Who: This change applies to users with a B2B Commerce for Lightning Experience license.

How: Use SFDX to install the enhanced flow and automatically set it as the default. If necessary, you can use the older asynchronous flow, but we recommend the enhanced flow.

SEE ALSO:

[SFDX](#)

Add Fractional Product Quantities

Support buyers who want to order products in fractional quantities, such as 1.5 tons of cement or 1.25 kilos of apples. Use fractional quantities with up to four decimal places to define the minimum and maximum amounts of a product that a customer can buy. Fractional quantities are visible when a buyer searches for a product, views the product's details, and adds the quantity to the cart.

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

How: Order APIs support and calculate the quantities with up to four decimal positions. On the Order pages, you can only view or edit the quantity field with up to two decimal places. Any other pages that reference these quantity fields also only reflect two decimal places. Order Summary data model doesn't support any decimal places.

SEE ALSO:

[Create Purchase Quantity Rules \(can be outdated or unavailable during release preview\)](#)

Define and Select Product Quantities with the Quantity Selector

Buyers can now view quantity rules, select quantities, and add products directly to their carts from the pages where they find them. Previously, buyers left the Category Detail or Search Results pages to go to the Product Details page to add items to their cart.

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

How: Use Experience Builder to add or modify Quantity Selector properties on these pages.

Experience Builder Page	Component
Product Detail	Product Detail Purchase Options or Product Detail Card
Category Detail	Results Layout
Search Results	Results Layout
Cart	Cart

Use the Quantity Selector properties to define minimum, maximum, and increment text, the Quantity Selector label, and whether to show quantity rules.

The screenshot shows a configuration panel titled "Quantity Selector" with a dropdown arrow. It contains several settings:

- A checked checkbox labeled "Show quantity selector and rules" with an information icon.
- A field labeled "Minimum Text" with an information icon, containing the text "Minimum quantity is {0}".
- A field labeled "Maximum Text" with an information icon, containing the text "Maximum quantity is {0}".
- A field labeled "Increment Text" with an information icon, containing the text "Sold in increments of {0}".
- A checked checkbox labeled "Show quantity rules" with an information icon.
- A field labeled "Quantity Selector Label" containing the text "QTY".

SEE ALSO:

[Cart \(can be outdated or unavailable during release preview\)](#)

[Product Detail Card \(can be outdated or unavailable during release preview\)](#)

[Results Layout \(can be outdated or unavailable during release preview\)](#)

Import Products at the Global Level

Use a CSV file to import products that aren't associated with a particular B2B or B2C store. In the product import CSV file, you can specify products and variations, categories, entitlement policies, and prices for multiple price books. After the import, you can use the products for any store.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: We provide templates to get you started creating the CSV file. When the file is ready, from the Product Workspace, click **Import** and follow the instructions to upload the file and start the import process.

SEE ALSO:

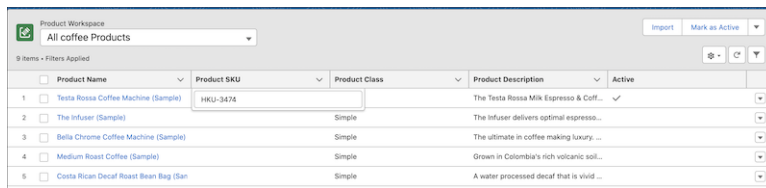
[Import Products Using a CSV File \(can be outdated or unavailable during release preview\)](#)

Edit and View Workspaces More Efficiently

Save time when configuring products, pricing, and promotions by editing fields inline directly in your workspace. You can edit boolean, number (int, long, and double), phone, text, and url fields. You can edit multiple fields in up to 200 rows at a time. You can also filter the list of items using up to two cross-entity filters. These enhancements apply to the product, promotion, and pricing workspaces.

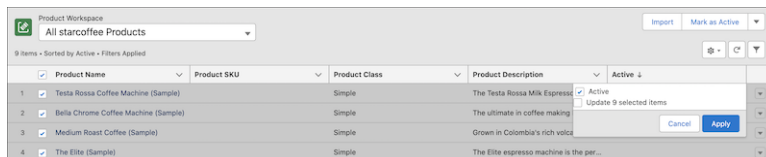
Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Performance, Unlimited, and Developer editions.

How: To edit a field in a workspace, hover your cursor over the field. Click the pencil icon to open the field for editing.



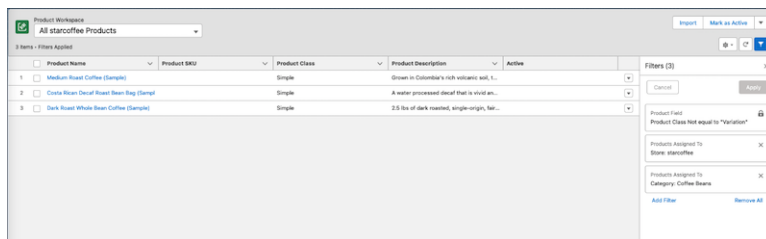
	Product Name	Product SKU	Product Class	Product Description	Active
1	Testa Rossa Coffee Machine (Sample)	HKU-3476		The Testa Rossa Milk Espresso & Coff...	✓
2	The Infuser (Sample)		Simple	The Infuser delivers optimal espresso...	
3	Bella Chrome Coffee Machine (Sample)		Simple	The ultimate in coffee making luxury...	
4	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volcanic soil...	
5	Costa Rican Decaf Roast Bean Bag (Sample)		Simple	A water processed decaf that is vivid...	

To edit fields for multiple items in the workspace, select the items and then click the pencil icon in the field. Select the option to update all selected items.



	Product Name	Product SKU	Product Class	Product Description	Active
1	Testa Rossa Coffee Machine (Sample)		Simple	The Testa Rossa Milk Espresso	Active
2	Bella Chrome Coffee Machine (Sample)		Simple	The ultimate in coffee making	
3	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volca...	
4	The Elite (Sample)		Simple	The Elite espresso machine is the per...	

To filter items in a workspace, create the filters based on other entities. For example, filter products in the Product Workspace based on store and category.



	Product Name	Product SKU	Product Class	Product Description	Active
1	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volcanic soil, t...	
2	Costa Rican Decaf Roast Bean Bag (Sample)		Simple	A water processed decaf that is vivid an...	
3	Dark Roast Whole Bean Coffee (Sample)		Simple	2.5 lbs of dark roasted, single-origin, fer...	

SEE ALSO:

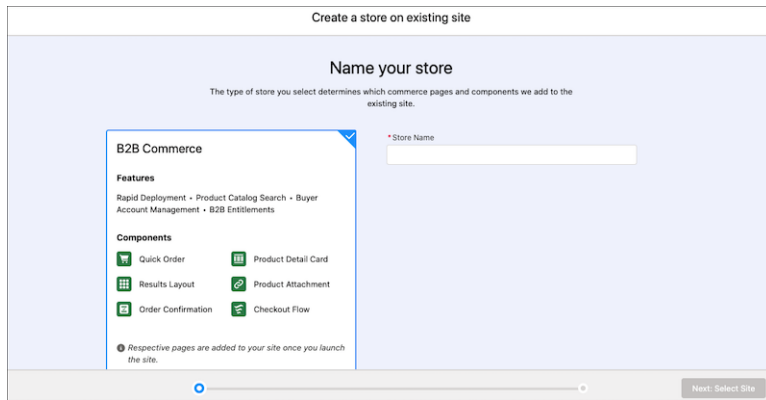
[Commerce Workspaces](#)


Create a B2B Store on an Existing Experience Cloud Site

You don't have to create a store on a new site. You can reuse domain and site settings, branding, and styling to present an integrated experience to your users. When you add a store, the existing site template, pages, components, and navigation stay the same, but you can add commerce pages and components. You can create a store on any site that doesn't already have a store, that's using the Aura framework, and that's using either the Customer Portal template (CPT), Starter template, or B2B template.

Where: This change applies to B2B Commerce for Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: From the Stores page, click **Create a Store on an Existing Site**, and follow the instructions to select your site and add the B2B store.



 **Note:** If you're using B2B Commerce for Lightning Experience and have existing Experience Cloud sites, those sites now show commerce pages and components as available in Experience Builder. But the pages and components don't work correctly until you create a store for the site because the components require store context.

SEE ALSO:

[Create a Store on an Existing Experience Cloud Site \(can be outdated or unavailable during release preview\)](#)

Use Modular Components on the Product Detail Page

Customize and reduce the time to configure product options on the Product Detail page with the new Image Detail, Breadcrumbs, Product Heading, and Purchase Options modular components. With the new modular components, use only the components that you need rather than the out-of-the-box Product Detail Card component. Existing customers can still use the Product Detail Card component, but any customization requires rebuilding the component.

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

SEE ALSO:

[Product Detail Breadcrumbs \(can be outdated or unavailable during release preview\)](#)

[Product Detail Headings \(can be outdated or unavailable during release preview\)](#)

[Product Detail Image Gallery \(can be outdated or unavailable during release preview\)](#)

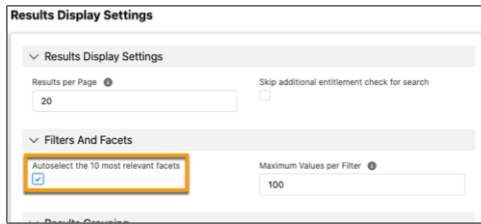
[Product Detail Image Purchase Options \(can be outdated or unavailable during release preview\)](#)

Automatically Display the Most Relevant Facets for B2B Commerce Search

Automatically select, order, and display the 10 most-relevant facets, including the Category facet, based on Search results.

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

How: In the Search tile, select the **Results Filters** tab, and click **Manage Filters**. In the **Available Fields** column, move up to 49 filters to the **Selected Fields** column. In the Results Display Settings tab, select **Autoselect the 10 most relevant facets** in the Filters and Facets section and then rebuild the index from the Search Index Summary tab.



SEE ALSO:

[Automatically Select the Most-Relevant Facets \(can be outdated or unavailable during release preview\)](#)

Customers Can View About 5,000 Results per Search Request in B2B Commerce Search

Regardless of how many results that the Commerce Search engine returns, it limits the number of viewable results to 5,000 after showing the first results page. For example, with a setting of 20 results per page, after the first page, Search provides 250 more pages of 20 products each, for a total of 5,020 viewable results. An error message appears when a customer attempts to view products beyond page 251.

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

How: To view more results, customers can use sorting options to reorder the results or use filter values to refine their search output.

SEE ALSO:

[Considerations for Product Searchability](#)

Rebuild the Search Index up to 60 Times per Hour in B2B Commerce Search

You can rebuild the search index up to 5 times per hour for individual storefronts, and up to 60 times per hour for all storefronts in an org.

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

How: To rebuild the Search Index, access the Search tile for the storefront, click **Search Index Summary**, and then click **Rebuild Index**. An error message occurs if you exceed the hourly rate limit.



Warning: If you're automating search index rebuilds, evenly space the rebuilds to ensure that you don't exceed the hourly rates.

SEE ALSO:

[Build or Rebuild the Search Index](#)

Search Indexes Deleted After 60 Days of Inactivity for B2B Commerce Search

To conserve resources, storefront indexes that have no search activity for 60 consecutive days are deleted. To reactivate search, you must rebuild the index.

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

How: To rebuild the Search Index, access the Search tile for the storefront, click **Search Index Summary**, and then click **Rebuild Index**.

SEE ALSO:

[Build or Rebuild the Search Index](#)

Set Up Your Org for Commerce More Easily

New guides in PDF format take you through preparing and setting up your org for B2B Commerce for Lightning Experience or B2B2C Commerce. We also have a new guide that includes just the setup steps for Salesforce admins who want to add B2B2C Commerce to B2B Commerce for Lightning Experience.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Download the PDF guides.

- [B2B Commerce on Lightning Experience Set Up Guide \(can be unavailable during release preview\)](#)
- [B2B2C Commerce Set Up Guide \(can be unavailable during release preview\)](#)
- [Add B2B2C Commerce to B2B Commerce on Lightning Experience Set Up Guide \(can be unavailable during release preview\)](#)

Modernize the B2B Commerce Order Experience with Salesforce Order Management

Modernize the entire B2B Commerce order lifecycle from purchase through fulfillment and order servicing by implementing Salesforce Order Management. Manage orders from any channel, and create integrated buying experiences across channels by centralizing order, inventory, product, and customer data. Streamline order servicing with a self-service storefront for shipment tracking, invoice management, cancellations, and returns.

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

Who: Salesforce Order Management is available to B2B Commerce users with a Salesforce Order Management license.

SEE ALSO:

[Salesforce Order Management \(can be outdated or unavailable during release preview\)](#)

Resume Shopping Without Canceling Checkout

Now carts unlock automatically for buyers who abandon a checkout process, so they can pick up right where they left off. Previously, to continue shopping, buyers unlocked their carts manually. With this enhancement, consider reviewing your extensions or other customizations to make changes, if necessary.

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

Who: This change is available for users with a B2B Commerce for Lightning Experience license.

Add a Buyer Group Related List to Your Account Record Pages

The Buyer Group related list shows the buyer groups associated with the account. You can assign or remove accounts from buyer groups directly from the related list.

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

SEE ALSO:

[Add Buyer Accounts to a Buyer Group \(can be outdated or unavailable during release preview\)](#)

Use Buyer Group User Permissions to Share Access to Buyer Group Members

New user permissions control access to buyer group members. Access to a buyer group member is now determined by a user's access to the member's buyer group.

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

SEE ALSO:

[Create a Buyer Group and Associate It with a Store \(can be outdated or unavailable during release preview\)](#)

Create Secondary Carts Using the Connect API

Use the Connect API to create multiple active carts for the same buyer. To use this feature, you have to build your own front end as a custom solution.

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

Who: This change applies to users with a B2B Commerce for Lightning Experience license.

SEE ALSO:

[Commerce Webstore Cart, Make Primary](#)

See Only Categories with Entitled Products When Browsing Categories

When browsing product categories on the storefront, buyers and guest users only see a category's entitled products. If a category has no entitled products, it also doesn't display on the storefront.

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

How: To view a category or its descendent categories, it must have entitlement to at least one product within the category. Rebuild your search index for any category changes to take effect. The Account Selector option isn't available with this feature.

SEE ALSO:

[Show Only Categories with Entitled Products \(can be outdated or unavailable during release preview\)](#)

Use the Organization-Wide Defaults Sharing Setting to Control Access to Products

A new Organization-Wide Defaults (OWD) setting is now available for Product records.

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

Why: B2B Commerce APIs now determine access to products based on entitlements. Salesforce recommends that you set the Default External Access OWD sharing setting on Product records to Private for all commerce use cases. If the Default External Access OWD sharing setting isn't set to Private, and you have multiple stores or both stores and other Experience Cloud sites, it's possible for authenticated users to use a SOQL query and discover all your products regardless of any entitlements you've set up. However, they can't see prices

nor purchase products. For the most secure setup for external users, don't grant access to products and other commerce objects at the profile level. Instead, grant access to objects through a permission set that is only assigned to buyers and buyer managers.

SEE ALSO:

[Set Up B2B Commerce on Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Display All Category Navigation Menu Items

When you use a data source to define the menu categories, there's an additional menu item for all categories. If you manually add a category menu item, the parent of the category menu doesn't include a menu item for all categories.

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

SEE ALSO:

[Multi-Level Navigation Menu](#)

Give Buyers a Complete View of Their Account's Order History

The Order List component now shows all orders visible to the current buyer, placed in the current storefront, and related to the current account. Depending on your security settings, this component can include orders placed by other buyers on the account. Previously, buyers saw only the orders that they placed. We recommend that you review your security settings to make sure that buyers have only the required access.

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

Who: This change is available for users with a B2B Commerce for Lightning Experience license.

SEE ALSO:

[Order List](#)

B2B2C Commerce

Enhancements for B2B2C Commerce include the ability to import products at a global level and recommend products to shoppers based on site-wide purchase behavior. You can also work more efficiently with workspaces and display the most relevant facets for search.

IN THIS SECTION:

[Import Products at the Global Level](#)

Use a CSV file to import products that aren't associated with a particular B2B or B2C store. In the product import CSV file, you can specify products and variations, categories, entitlement policies, and prices for multiple price books. After the import, you can use the products for any store.

[Do More with B2C Data Import](#)

You can now specify multiple categories in the CSV file and import product variations. Use any of these data types for custom fields: string, checkbox, currency, date, date/time, email, number, percent, phone, picklist, picklist (multiselect), text, text area, text area (long), text area (rich), time, or url. You can also specify that the import use an existing catalog or entitlement policy instead of the defaults.

[Edit and View Workspaces More Efficiently](#)

Save time when configuring products, pricing, and promotions by editing fields inline directly in your workspace. You can edit boolean, number (int, long, and double), phone, text, and url fields. You can edit multiple fields in up to 200 rows at a time. You can also filter the list of items using up to two cross-entity filters.

[Increase Shopper Conversion with Customers Also Bought Einstein Recommendations](#)

Recommend products to shoppers based on site-wide purchase behavior to increase conversion rate and automate manual merchandising on product pages. Commerce Einstein now gathers shopper purchases across your site. This enhancement enables the use case for Customers Also Bought to recommend products frequently bought together by shoppers who also bought the item being viewed.

[Automatically Display the Most Relevant Facets for B2B2C Commerce Search](#)

Automatically select, order, and display the 10 most-relevant facets, including the Category facet, based on Search results.

[Customers Can View About 5,000 Results per Search Request in B2B2C Commerce Search](#)

Regardless of how many results that the Commerce Search engine returns, it limits the number of viewable results to 5,000 after showing the first results page. For example, with a setting of 20 results per page, after the first page, Search provides 250 more pages of 20 products each, for a total of 5,020 viewable results. An error message appears when a customer attempts to view products beyond page 251.

[Rebuild the Search Index up to 60 Times per Hour in B2B2C Commerce Search](#)

You can rebuild the search index up to 5 times per hour for individual storefronts, and up to 60 times per hour for all storefronts in an org.

[Search Indexes Deleted After 60 Days of Inactivity for B2B2C Commerce Search](#)

To conserve resources, storefront indexes that have no search activity for 60 consecutive days are deleted. To reactivate search, you must rebuild the index.

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[Free Up Storage With Weekly Job that Deletes Expired B2B2C Commerce Guest Carts](#)

Now a weekly job runs behind the scenes to delete expired guest carts from your B2B2C store. This gives you room for more data storage in Salesforce.

Import Products at the Global Level

Use a CSV file to import products that aren't associated with a particular B2B or B2C store. In the product import CSV file, you can specify products and variations, categories, entitlement policies, and prices for multiple price books. After the import, you can use the products for any store.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: We provide templates to get you started creating the CSV file. When the file is ready, from the Product Workspace, click **Import** and follow the instructions to upload the file and start the import process.

SEE ALSO:

[Import Products for All Stores Using a CSV File \(can be outdated or unavailable during release preview\)](#)

Do More with B2C Data Import

You can now specify multiple categories in the CSV file and import product variations. Use any of these data types for custom fields: string, checkbox, currency, date, date/time, email, number, percent, phone, picklist, picklist (multiselect), text, text area, text area (long), text area (rich), time, or url. You can also specify that the import use an existing catalog or entitlement policy instead of the defaults.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: We provide a template to get you started creating the CSV file. The first time you import data to a store, we recommend that you let the import process use the default catalog and entitlement policy. On subsequent imports, you can override the defaults and select another catalog or entitlement policy.

SEE ALSO:

[B2C Data Import \(can be outdated or unavailable during release preview\)](#)

Edit and View Workspaces More Efficiently

Save time when configuring products, pricing, and promotions by editing fields inline directly in your workspace. You can edit boolean, number (int, long, and double), phone, text, and url fields. You can edit multiple fields in up to 200 rows at a time. You can also filter the list of items using up to two cross-entity filters.

Where: This change applies to the Product Workspace, Promotion Workspace, and Pricing Workspace in B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Performance, Unlimited, and Developer editions.

How: To edit a field in a workspace, hover your cursor over the field. Click the pencil icon to open the field for editing.

	Product Name	Product SKU	Product Class	Product Description	Active
1	Testa Rossa Coffee Machine (Sample)	HKU-3474		The Testa Rossa Mlk Espresso & Coff...	✓
2	The Infuser (Sample)		Simple	The Infuser delivers optimal espresso...	
3	Bella Chrome Coffee Machine (Sample)		Simple	The ultimate in coffee making luxury...	
4	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volcanic soil...	
5	Costa Rican Decaf Roast Bean Bag (Sam)		Simple	A water processed decaf that is vivid...	

To edit fields for multiple items in the workspace, select the items to be edited and then click the pencil icon in the field. Select the option to update all selected items.

	Product Name	Product SKU	Product Class	Product Description	Active
1	Testa Rossa Coffee Machine (Sample)		Simple	The Testa Rossa Mlk Espresso	✓
2	Bella Chrome Coffee Machine (Sample)		Simple	The ultimate in coffee making	✓
3	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volca	✓
4	The Elite (Sample)		Simple	The Elite espresso machine is the per...	

To filter items in a workspace, create the filters based on other entities. For example, filter products in the Product Workspace based on store and category.

	Product Name	Product SKU	Product Class	Product Description	Active
1	Medium Roast Coffee (Sample)		Simple	Grown in Colombia's rich volcanic soil, t...	
2	Costa Rican Decaf Roast Bean Bag (Sam)		Simple	A water processed decaf that is vivid an...	
3	Dark Roast Whole Bean Coffee (Sample)		Simple	2.5 lbs of dark roasted, single-origin, fair...	

SEE ALSO:

[Commerce Workspaces](#)

Increase Shopper Conversion with Customers Also Bought Einstein Recommendations

Recommend products to shoppers based on site-wide purchase behavior to increase conversion rate and automate manual merchandising on product pages. Commerce Einstein now gathers shopper purchases across your site. This enhancement enables the use case for Customers Also Bought to recommend products frequently bought together by shoppers who also bought the item being viewed.

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

How: Deploy Commerce Einstein on your B2B2C Commerce site and enable activity tracking to capture shopper activities with the new finishCheckout API request. Use Experience Builder to add or modify the Einstein Recommendations Component on the Product page, and select the **Customers Also Bought** recommendation from the Use Case menu.

SEE ALSO:

[Tracked Data \(can be outdated or unavailable during release preview\)](#)

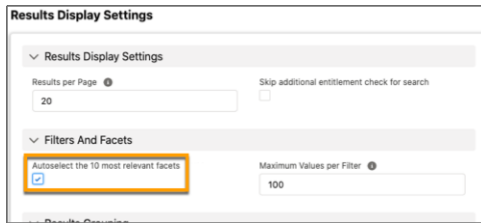
[Einstein Recommendations Component \(can be outdated or unavailable during release preview\)](#)

Automatically Display the Most Relevant Facets for B2B2C Commerce Search

Automatically select, order, and display the 10 most-relevant facets, including the Category facet, based on Search results.

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

How: In the Search tile, select the **Results Filters** tab, and click **Manage Filters**. In the **Available Fields** column, move up to 49 filters to the **Selected Fields** column. In the Results Display Settings tab, select **Autoselect the 10 most relevant facets** in the Filters and Facets section and then rebuild the index from the Search Index Summary tab.



SEE ALSO:

[Define Search Results Display Settings](#)

Customers Can View About 5,000 Results per Search Request in B2B2C Commerce Search

Regardless of how many results that the Commerce Search engine returns, it limits the number of viewable results to 5,000 after showing the first results page. For example, with a setting of 20 results per page, after the first page, Search provides 250 more pages of 20 products each, for a total of 5,020 viewable results. An error message appears when a customer attempts to view products beyond page 251.

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

How: To view more results, customers can use sorting options to reorder the results or use filter values to refine their search output.

SEE ALSO:

[Commerce Administrator Considerations for Product Searchability](#)

Rebuild the Search Index up to 60 Times per Hour in B2B2C Commerce Search

You can rebuild the search index up to 5 times per hour for individual storefronts, and up to 60 times per hour for all storefronts in an org.

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

How: To rebuild the Search Index, access the Search tile for the storefront, click **Search Index Summary**, and then click **Rebuild Index**. An error message occurs if you exceed the hourly rate limit.



Warning: If you're automating search index rebuilds, evenly space the rebuilds to ensure that you don't exceed the hourly rates.

SEE ALSO:

[Build the Search Index](#)

Search Indexes Deleted After 60 Days of Inactivity for B2B2C Commerce Search

To conserve resources, storefront indexes that have no search activity for 60 consecutive days are deleted. To reactivate search, you must rebuild the index.

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

How: To rebuild the Search Index, access the Search tile for the storefront, click **Search Index Summary**, and then click **Rebuild Index**.

SEE ALSO:

[Build the Search Index](#)

Set Up Your Org for Commerce More Easily

New guides in PDF format take you through preparing and setting up your org for B2B Commerce for Lightning Experience or B2B2C Commerce. We also have a new guide that includes just the setup steps for Salesforce admins who want to add B2B2C Commerce to B2B Commerce for Lightning Experience.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Download the PDF guides.

- [B2B Commerce on Lightning Experience Set Up Guide \(can be unavailable during release preview\)](#)
- [B2B2C Commerce Set Up Guide \(can be unavailable during release preview\)](#)
- [Add B2B2C Commerce to B2B Commerce on Lightning Experience Set Up Guide \(can be unavailable during release preview\)](#)

Free Up Storage With Weekly Job that Deletes Expired B2B2C Commerce Guest Carts

Now a weekly job runs behind the scenes to delete expired guest carts from your B2B2C store. This gives you room for more data storage in Salesforce.

Where: This change applies to Lightning Experience in Enterprise and Developer editions.

SEE ALSO:

[Configure Guest Browsing for B2C Stores](#)

Salesforce Order Management

Modernize the Salesforce B2B Commerce order experience with Salesforce Order Management. Improve shopper satisfaction with the new reship feature for handling lost or missing items. Apply Salesforce duplicate and matching rules to shopper records from Salesforce B2C Commerce order data.

IN THIS SECTION:

[Modernize the B2B Commerce Order Experience with Salesforce Order Management](#)

Modernize the entire B2B Commerce order lifecycle from purchase through fulfillment and order servicing by implementing Salesforce Order Management. Manage orders from any channel, and create integrated buying experiences across channels by centralizing order, inventory, product, and customer data. Streamline order servicing with a self-service storefront for shipment tracking, invoice management, cancellations, and returns.

[Reship Lost or Missing Order Items](#)

Delight your shoppers even when their order goes awry by reshipping lost or missing order items. Use the Reship workflow to create a fulfillment order and process a new shipment for a previously fulfilled item with no additional charge to the shopper.

[Handle Orders with Multiple Payments More Robustly](#)

All captured funds are now applied to an invoice before authorized funds, regardless of the amount. Previously, funds were applied based on order payment summary amounts, regardless of whether the funds were captured or authorized. In some cases, that behavior applied incorrect amounts. If you want to revert to the previous behavior, contact Salesforce Support.

[Associate Return Shipments with Return Orders](#)

The Shipment object has a new Return Order field, and the Shipment Item object has a new Return Order Line Item field. The Return Order layout includes a new related list of associated shipments, and the Return Order Line Item layout includes a related list of associated shipment items.

[Apply Salesforce Duplicate Management to Shopper Records from B2C Commerce](#)

You can configure the B2C Commerce integration to apply your org's duplicate and matching rules when ingesting account, contact, and person account records for shoppers.

[Include Custom Email Data in B2C Commerce Orders](#)

The Salesforce B2C Commerce integration supports the Email data type for matching custom attributes and fields.

[Categorize Sales Channels by Business Type](#)

The Sales Channel object has new Type and Type Category picklist fields. Type Category contains the fixed values B2B, B2C, and Other, and it isn't visible in the UI. Type contains default values matching the Type Category values, and is customizable. Each value in the Type picklist is associated with a value from the Type Category picklist, and multiple Type values can be associated with each Type Category value. In existing Order Management orgs, the Winter '22 automated update process sets both fields to B2C for each sales channel that's associated with at least one managed order summary. If your Order Management org is integrated with B2C Commerce, don't delete the B2C value from the Type picklist.

[Categorize Order Summaries as B2C or B2B](#)

Use the new Order Summary object field, Business Model, to specify the type of order: B2C or B2B. When creating an order summary via the Connect in Apex method, Connect REST API endpoint, or Flow core action, you can optionally specify this value as an input property.

[Edit Order Delivery Information](#)

Users with the Edit Delivery Information user permission can edit most fields on order delivery group summaries. This permission is included in the Order Management Agent and Order Management Operations Manager standard permission sets.

Modernize the B2B Commerce Order Experience with Salesforce Order Management

Modernize the entire B2B Commerce order lifecycle from purchase through fulfillment and order servicing by implementing Salesforce Order Management. Manage orders from any channel, and create integrated buying experiences across channels by centralizing order, inventory, product, and customer data. Streamline order servicing with a self-service storefront for shipment tracking, invoice management, cancellations, and returns.

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

Who: Salesforce Order Management is available to B2B Commerce users with a Salesforce Order Management license.

SEE ALSO:

[Salesforce Order Management \(can be outdated or unavailable during release preview\)](#)

Reship Lost or Missing Order Items

Delight your shoppers even when their order goes awry by reshipping lost or missing order items. Use the Reship workflow to create a fulfillment order and process a new shipment for a previously fulfilled item with no additional charge to the shopper.

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

Who: The Reship workflow is available to users with a Salesforce Order Management Growth or Plus license.

SEE ALSO:

[Reship Order Items \(can be outdated or unavailable during release preview\)](#)

Handle Orders with Multiple Payments More Robustly

All captured funds are now applied to an invoice before authorized funds, regardless of the amount. Previously, funds were applied based on order payment summary amounts, regardless of whether the funds were captured or authorized. In some cases, that behavior applied incorrect amounts. If you want to revert to the previous behavior, contact Salesforce Support.

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

Who: This change applies to orgs with a Salesforce Order Management license.

Associate Return Shipments with Return Orders

The Shipment object has a new Return Order field, and the Shipment Item object has a new Return Order Line Item field. The Return Order layout includes a new related list of associated shipments, and the Return Order Line Item layout includes a related list of associated shipment items.

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

Who: This change applies to orgs with a Salesforce Order Management Growth or Plus license and the Return Merchandise Authorization (RMA) feature enabled.

Apply Salesforce Duplicate Management to Shopper Records from B2C Commerce

You can configure the B2C Commerce integration to apply your org's duplicate and matching rules when ingesting account, contact, and person account records for shoppers.

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

Who: This change applies to orgs with a Salesforce Order Management license and that are using the Salesforce B2C Commerce integration.

How: In Setup, in the Order Management settings, turn on **B2C Integration Data Matching Rules**.

Include Custom Email Data in B2C Commerce Orders

The Salesforce B2C Commerce integration supports the Email data type for matching custom attributes and fields.

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

Who: This change applies to orgs with a Salesforce Order Management license and that are using the Salesforce B2C Commerce integration.

Categorize Sales Channels by Business Type

The Sales Channel object has new Type and Type Category picklist fields. Type Category contains the fixed values B2B, B2C, and Other, and it isn't visible in the UI. Type contains default values matching the Type Category values, and is customizable. Each value in the Type picklist is associated with a value from the Type Category picklist, and multiple Type values can be associated with each Type Category value. In existing Order Management orgs, the Winter '22 automated update process sets both fields to B2C for each sales channel that's associated with at least one managed order summary. If your Order Management org is integrated with B2C Commerce, don't delete the B2C value from the Type picklist.

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

Who: This change applies to orgs with a Salesforce Order Management license.

Categorize Order Summaries as B2C or B2B

Use the new Order Summary object field, Business Model, to specify the type of order: B2C or B2B. When creating an order summary via the Connect in Apex method, Connect REST API endpoint, or Flow core action, you can optionally specify this value as an input property.

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

Who: This change applies to orgs with a Salesforce Order Management license.

Edit Order Delivery Information

Users with the Edit Delivery Information user permission can edit most fields on order delivery group summaries. This permission is included in the Order Management Agent and Order Management Operations Manager standard permission sets.

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

Who: This change applies to orgs with a Salesforce Order Management license.

Omnichannel Inventory

Enhancements to Omnichannel Inventory include the ability to access headless APIs using your Salesforce org credentials.

IN THIS SECTION:

[Access Omnichannel Inventory Headless APIs with Your Salesforce Credentials](#)

You can now use your Salesforce org credentials to authenticate and use the headless Salesforce Commerce APIs for Omnichannel Inventory. Previously, you needed a B2C Commerce license with Account Manager permissions.

Access Omnichannel Inventory Headless APIs with Your Salesforce Credentials

You can now use your Salesforce org credentials to authenticate and use the headless Salesforce Commerce APIs for Omnichannel Inventory. Previously, you needed a B2C Commerce license with Account Manager permissions.

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

SEE ALSO:

[Omnichannel Inventory](#)

[Omnichannel Inventory Implementation Guide](#)

[Commerce Cloud Developer Center](#)

Customization

Create more dynamic and performant Lightning pages with Dynamic Interactions and improvements to Performance Analysis for App Builder. Choose from a larger selection of publicly available APIs thanks to added support for larger spec sizes and expanded limits for operations, actions, and objects. Support your users wherever they work with new time zones, languages, and locales.

IN THIS SECTION:

[Lightning App Builder](#)

Use Dynamic Interactions to create applications with components that communicate and transform based on user actions. And get more help improving your Lightning page performance. Performance Analysis for App Builder now runs automatically and alerts you to more custom component performance predictions. Org-specific metrics now help you decide how important taking these performance predictions is.

[External Services](#)

Use a larger selection of publicly available APIs thanks to added support for even larger spec sizes and expanded limits for operations, actions, and objects. Register your Mulesoft API specs with a simplified, integrated workflow. Select your registered actions directly from Einstein Bots! And try the new Trailhead experience - Salesforce super-powers await.

[Globalization](#)

New time zones, locales, and platform-only languages are available in Salesforce. We updated existing locales to the latest formats as well as the translations for some standard object, tab, and field names. And you can enable the new locale format standard via a release update.

[Sharing](#)

Find out how to hide fields containing personal information from external users with an enhanced user management setting. Manage access to sensitive data on contracts, tasks, events, time sheets, and time sheet entries. And limit the default records that your users see so that they only see what's necessary.

[Profiles and Permissions](#)

Get the benefits of expanded profile and permission management. Use the power of permission set groups to configure session-based access control. Create custom profiles using the API instead of cloning existing profiles.

[Einstein Recommendation Builder](#)

Try Einstein and build recommendations at no additional cost. Independent service vendors (ISVs) and partners can now use managed packages to save time and seamlessly share custom recommendations with other Salesforce orgs.

[General Setup](#)

Edit external object names while syncing, perform sync asynchronously, and create external lookup relationships for table lookup fields.

Lightning App Builder

Use Dynamic Interactions to create applications with components that communicate and transform based on user actions. And get more help improving your Lightning page performance. Performance Analysis for App Builder now runs automatically and alerts you to more custom component performance predictions. Org-specific metrics now help you decide how important taking these performance predictions is.

IN THIS SECTION:[Build More Interactive Lightning Pages with Dynamic Interactions](#)

Now you can create applications with components that communicate and transform based on user interactions, all in the Lightning App Builder UI. With Dynamic Interactions, an event occurring in one component on a Lightning page, such as the user clicking an item in a list view, can update other components on the page.

[Bring Dynamic Interactions to Your Dynamic Actions Bar \(Pilot\)](#)

Now you can update multiple components on your app page with one click of a button in your Dynamic Actions Bar. An admin can use the Dynamic Actions Bar component to create Dynamic Interactions, which trigger other components to update and transform based on user interactions.

[Let Org-Specific Metrics Guide Your Lightning Page Performance Improvements](#)

Various factors can affect your Lightning page's performance at runtime. Performance Analysis for App Builder gives you recommendations to improve your page performance. Now you can see your users' performance metrics to help you decide which recommendations to take or to defer. Data from the last 90 days of use is analyzed and displayed in your Org-Specific Metrics card results. This analysis includes your users' network latency, browser speed, and number of cores.

[Get Performance Analysis for App Builder Recommendations Automatically](#)

Performance Analysis for App Builder now automatically runs when you build a page in Lightning App Builder. If your page performance is poor or moderate, recommendations to improve performance appear, and the warning icon appears next to the Analyze button.

[Improve Page Performance with More Custom Lightning Component Analysis](#)

Updates to Performance Analysis for App Builder give you more performance predictions for your custom Lightning components on your Lightning page.

[Use Flow Orchestrator Work Guide to Connect Users with Tasks \(Beta\)](#)

The new Flow Orchestrator Work Guide (Beta) component displays actions generated by Flow Orchestrator orchestrations to assigned users.

Build More Interactive Lightning Pages with Dynamic Interactions


Now you can create applications with components that communicate and transform based on user interactions, all in the Lightning App Builder UI. With Dynamic Interactions, an event occurring in one component on a Lightning page, such as the user clicking an item in a list view, can update other components on the page.

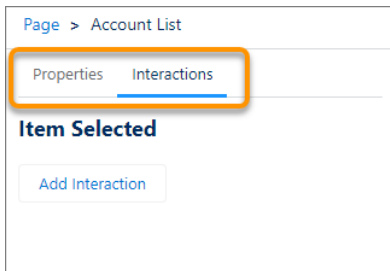
Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To get the most out of Dynamic Interactions, admins and developers work together.

Developers write custom Lightning web components that power the dynamic interactions. The developer defines the events that are supported by a component and then exposes them in the Lightning App Builder. Then for each event, admins can create interactions between the source and target components using a new Dynamic Interactions UI in the Lightning App Builder properties pane.

If a component has events exposed for it, its properties pane has two tabs. The Properties tab contains the component properties that you're familiar with. The Interactions tab is new for Dynamic Interactions. It lists all the events that the developer exposed for the selected component and any interactions that have been configured for each event.

 **Example:** This Account List source component has an Item Selected event available but no interactions set up for it. What happens when a user selects an item in the list? You decide. Click **Add Interaction**, select a target component, and then define what happens to that target component when the event is triggered.



The Item Selected event fires when a user clicks a list item in the Account List component. For example, you can configure an interaction with a map component as the target. When a user clicks an account record in the list, the target component pinpoints that account's location on a map. Then every new click or tap on an account in the list results in an update to the target component.

SEE ALSO:

[Expose Events in the Lightning App Builder](#)

[Salesforce Help: Dynamic Interactions in the Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Interactions in the App Builder \(can be outdated or unavailable during release preview\)](#)


[Lightning Web Components Dev Guide: Configure a Component for Dynamic Interactions in the Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

[Bring Dynamic Interactions to Your Dynamic Actions Bar \(Pilot\)](#)

Bring Dynamic Interactions to Your Dynamic Actions Bar (Pilot)

Now you can update multiple components on your app page with one click of a button in your Dynamic Actions Bar. An admin can use the Dynamic Actions Bar component to create Dynamic Interactions, which trigger other components to update and transform based on user interactions.

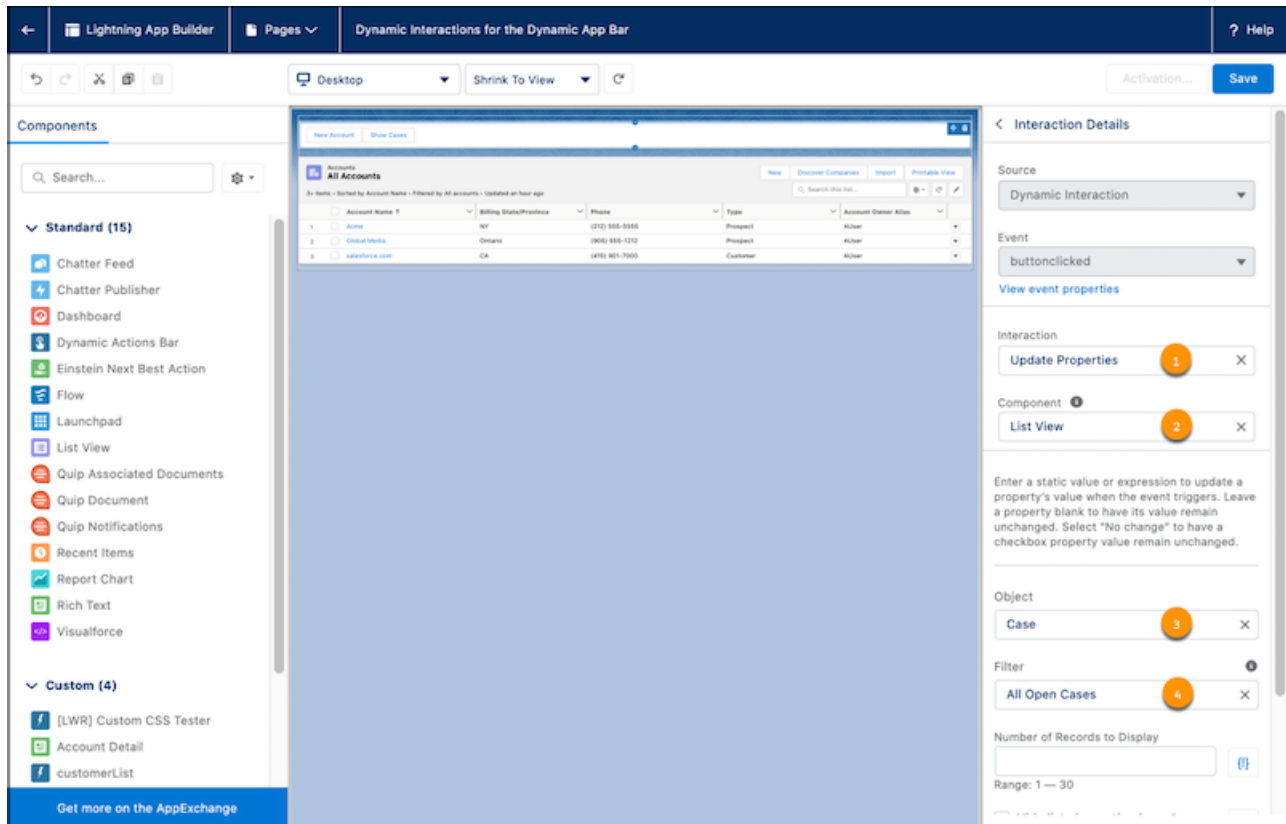
Where: This change applies to Lightning Experience in all editions.

 **Note:** The Dynamic Actions Bar component isn't generally available and is being piloted with certain Customers subject to additional terms and conditions. It isn't 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. To be nominated to participate in the Dynamic Actions Bar pilot program, contact Salesforce.

Why: Dynamic Interactions is a new feature for Lightning App Builder. You can use custom components as a source for Dynamic Interactions too, but the Dynamic Actions Bar component is the first standard component supported as a source for your interactions.

How: Add an interaction to your Dynamic Actions Bar just like you would add an action. When you select the Dynamic Actions Bar component on your app page, click **Add Interaction** in the properties pane. After you name the button, you can choose your interaction type and configure it in the pane.

For example, say you want to configure your new button, Show Cases, to update the List View component to show cases instead of accounts.



You want the button to update a component, so in the Interaction picker (1), under Components, select **Update Properties**. Then, specify the Component this interaction updates, **List View** (2). Choose the Object (3) and Filter (4) for your List View as **Case** and **All Open Cases**.

Now, when your users click **Show Cases** in the Dynamic Actions Bar, the List View changes to show open cases.

 **Note:** Dynamic Interactions for the Dynamic App Bar component are supported only on app pages.

SEE ALSO:

[Build More Interactive Lightning Pages with Dynamic Interactions](#)

[Salesforce Help: Dynamic Interactions in the Lightning App Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning Page Components \(can be outdated or unavailable during release preview\)](#)

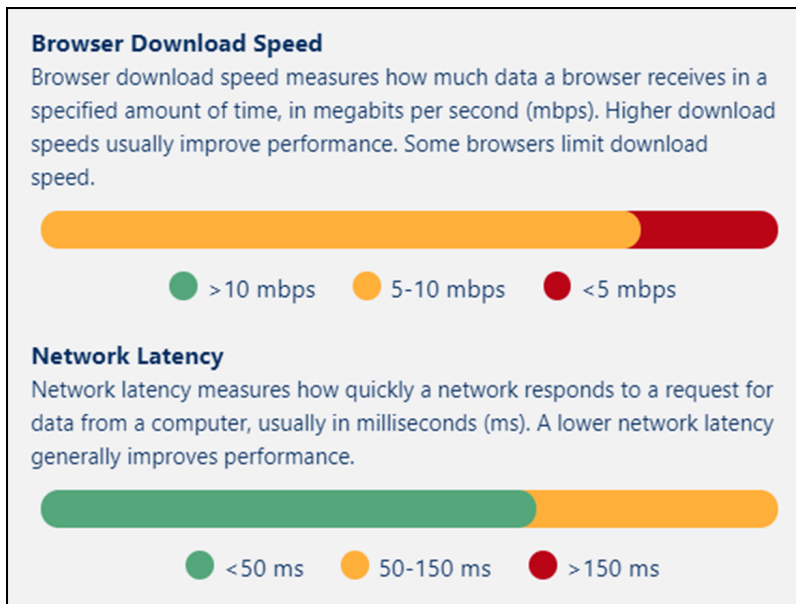
Let Org-Specific Metrics Guide Your Lightning Page Performance Improvements

Various factors can affect your Lightning page's performance at runtime. Performance Analysis for App Builder gives you recommendations to improve your page performance. Now you can see your users' performance metrics to help you decide which recommendations to take or to defer. Data from the last 90 days of use is analyzed and displayed in your Org-Specific Metrics card results. This analysis includes your users' network latency, browser speed, and number of cores.

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

How: To view org-specific metrics, click **Analyze** from the Lightning App Builder toolbar, if it has not run automatically.

The Org-Specific Metrics card shows data from the org that you're in. If you're viewing user metrics in a sandbox, the metrics are different than when viewed in production. If the Lightning page that you're analyzing isn't activated, the metrics shown reflect all users in the org. After the page is activated, the metrics are filtered to reflect only the users that the page is assigned to.



SEE ALSO:

[Salesforce Help: Lightning Page Performance \(can be outdated or unavailable during release preview\)](#)

Get Performance Analysis for App Builder Recommendations Automatically

Performance Analysis for App Builder now automatically runs when you build a page in Lightning App Builder. If your page performance is poor or moderate, recommendations to improve performance appear, and the warning icon appears next to the Analyze button.

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

How: You can minimize the recommendations window. Performance Analysis for App Builder continues to evaluate your page as you're working, even while minimized. If the recommendations aren't displayed, congratulations! Your page performance is good. If you want to run the analysis manually, click **Analyze**.

SEE ALSO:

[Salesforce Help: Lightning Page Performance \(can be outdated or unavailable during release preview\)](#)

Improve Page Performance with More Custom Lightning Component Analysis

Updates to Performance Analysis for App Builder give you more performance predictions for your custom Lightning components on your Lightning page.

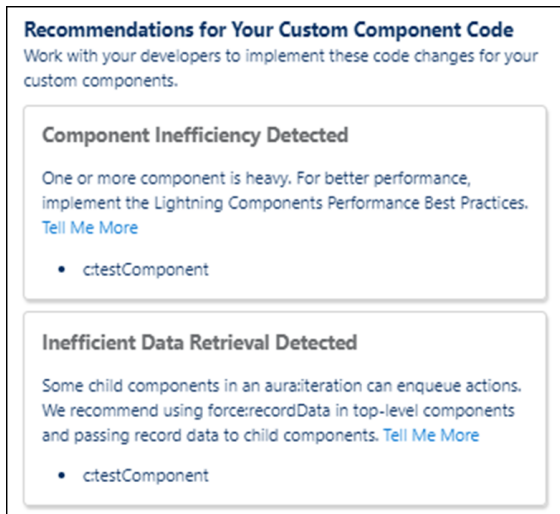
Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: To help you improve page performance, Performance Analysis for App Builder alerts you if a component contains:

- External CSS

- Unminified JavaScript
- A use of lightning:recordEditForm
- A use of layoutType="FULL"
- A use of lightning:tabFocused listeners

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 analyzed and incorporated into the desktop performance analysis card results. This analysis includes your page's predicted Experienced Page Time or page load time and the component performance breakdown card. Recommendations for optimizing custom components appear when relevant.



SEE ALSO:

[Salesforce Help: Lightning Page Performance \(can be outdated or unavailable during release preview\)](#)

Use Flow Orchestrator Work Guide to Connect Users with Tasks (Beta)

The new Flow Orchestrator Work Guide (Beta) component displays actions generated by Flow Orchestrator orchestrations to assigned users.

Where: This change applies to Lightning Experience in Essentials, Professional, 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](#).

SEE ALSO:

[Increase Productivity with Flow Orchestrator Work Guide \(Beta\)](#)

External Services

Use a larger selection of publicly available APIs thanks to added support for even larger spec sizes and expanded limits for operations, actions, and objects. Register your Mulesoft API specs with a simplified, integrated workflow. Select your registered actions directly from Einstein Bots! And try the new Trailhead experience - Salesforce super-powers await.

IN THIS SECTION:

[Use External Services for MuleSoft to Generate Actions \(Generally Available\)](#)

Import your MuleSoft Anypoint Platform APIs in a few clicks with External Services for MuleSoft. Select your MuleSoft named credentials, and let Salesforce do the heavy lifting of importing your endpoints and converting them into actions. Salesforce automatically gets the list of APIs available to your MuleSoft account across all your environments. Previously, you manually exported your Open API 2.0 specifications from MuleSoft and imported them into an external service. This export process can lead to validation errors when you created the actions in Salesforce.

[Register More API Specs with Revised and Expanded Operation, Action, and Object Limits](#)

You can register even more complex, publicly available API specifications. Most registration limits have been rescoped from a *per API spec* limitation to a *per org* limitation, and have been expanded.

[Map Non-Standard Media Types in Your Registration](#)

A Salesforce administrator, developer, or ISV can edit the compatible media type mappings in an external service registration for OpenAPI specifications with unknown or non-standard request or response media types.

[Unlock the Power of External Services in Einstein Bot Builder](#)

Use External Services in more parts of the Salesforce Platform! Integrating your Einstein bot with an external service is now as easy as adding an action to a Bot Builder dialog. You can add an external service's action to your bot from the Bot Builder. Previously, you could only add an external service's action to your bot via a flow.

[Major Enhancements to the Trailhead Experience](#)

We've made some major enhancements to the External Services Trailhead module based on your feedback. Understand how External Services works and exchanges data with Salesforce Flow! Oh yes... you'll want to pick up *this* badge.

[External Services UI Is Now Fully Compliant with Salesforce Accessibility Standards](#)

We've made External Services more accessible.

Use External Services for MuleSoft to Generate Actions (Generally Available)

Import your MuleSoft Anypoint Platform APIs in a few clicks with External Services for MuleSoft. Select your MuleSoft named credentials, and let Salesforce do the heavy lifting of importing your endpoints and converting them into actions. Salesforce automatically gets the list of APIs available to your MuleSoft account across all your environments. Previously, you manually exported your Open API 2.0 specifications from MuleSoft and imported them into an external service. This export process can lead to validation errors when you created the actions in Salesforce.

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

Who: To use External Services for MuleSoft, you need a valid MuleSoft license or demo account.

SEE ALSO:

[Salesforce Help: Import MuleSoft APIs \(can be outdated or unavailable during release preview\)](#)

Register More API Specs with Revised and Expanded Operation, Action, and Object Limits

You can register even more complex, publicly available API specifications. Most registration limits have been rescoped from a *per API spec* limitation to a *per org* limitation, and have been expanded.

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

How: This change of scope also addresses use cases where, due to the previous limitations, certain specs had to be registered multiple times in order to include all operations of interest within an API. Now, in many cases, you can include such a large API spec and activate all desired operations within a single registration. Simpler workflow, anyone?

Here are the previous limits, and the new, rescope values for Winter '22.

Limit	Previous Value	New Value for Winter '22
Max External Service registrations	25 per org	25 per org
Max schema size	1.5 MB	4.0 MB
Max active operations	25 per registration	625 per org
Max active objects	25 per registration	625 per org
Max active and inactive operations	200 per registration	5,000 total per org
Max active and inactive objects	500 per registration	5,000 total per org
Max properties	None	200,000 total per org

SEE ALSO:

[Salesforce Help: External Services Considerations \(can be outdated or unavailable during release preview\)](#)

Map Non-Standard Media Types in Your Registration

A Salesforce administrator, developer, or ISV can edit the compatible media type mappings in an external service registration for OpenAPI specifications with unknown or non-standard request or response media types.

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

How: There are certain public APIs, including a number from AWS, that require domain specific, custom header key-value pairs in order to complete the request. Some of these headers don't adhere to OpenAPI specification standards, and therefore, don't comply with the requirements of External Services. To mitigate the non-compliance, External Services overwrites these custom headers with a default value at registration time. This results in incomplete requests.

For Winter '22, we've provided a workaround. With the Metadata API, you can manipulate a registration and override the definition of the custom header.

To achieve this workaround, you:

1. Register the spec.
2. Use the Metadata API to retrieve the metadata about your registration.
3. Edit your registration's metadata to include the correct custom header key-value pair.
4. Redeploy the metadata back into your org using the Salesforce CLI.

You can use this workaround to successfully integrate External Services with non-standard media types.

SEE ALSO:

[Salesforce Help: MIME Type Mapping in External Service Registrations \(can be outdated or unavailable during release preview\)](#)

Unlock the Power of External Services in Einstein Bot Builder

Use External Services in more parts of the Salesforce Platform! Integrating your Einstein bot with an external service is now as easy as adding an action to a Bot Builder dialog. You can add an external service's action to your bot from the Bot Builder. Previously, you could only add an external service's action to your bot via a flow.

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

SEE ALSO:

[Unlock the Power of External Services in Bot Builder](#)

[Salesforce Help: Add an External Service Action](#)

Major Enhancements to the Trailhead Experience

We've made some major enhancements to the External Services Trailhead module based on your feedback. Understand how External Services works and exchanges data with Salesforce Flow! Oh yes... you'll want to pick up *this* badge.

SEE ALSO:

[Trailhead: External Services](#)

External Services UI Is Now Fully Compliant with Salesforce Accessibility Standards

We've made External Services more accessible.

SEE ALSO:

[External Link: Product Accessibility Status](#)

Globalization

New time zones, locales, and platform-only languages are available in Salesforce. We updated existing locales to the latest formats as well as the translations for some standard object, tab, and field names. And you can enable the new locale format standard via a release update.

IN THIS SECTION:

[Select New Time Zones](#)

To improve accuracy, to enhance integration with external systems, and to support your users wherever they work, users can now select from 430 time zones. With this change, Salesforce supports all time zones in the latest Time Zone Database version, 2021a.

[Connect with More Customers with New Languages and Locales](#)

To help you do business all over the world, French (Morocco), Greek (Cyprus), Greenlandic, and seven new English locales are available as platform-only languages. Users can also select locales related to these languages.

[Prepare for Updated Locale Formats](#)

To provide you with up-to-date formats, we updated the locale formats in Salesforce. We recommend that you evaluate how the format changes affect you. This release includes International Components for Unicode (ICU) version 69.1, which uses Common Locale Data Repository (CLDR) version 39. Whether you're using ICU or Java Development Kit (JDK) locale formats, this change updates the currency symbol for the Yoruba (Benin) locale. If you're using ICU locale formats, this change modifies a date time format for six Chinese locales.

[Review Updated Label Translations](#)

To improve accuracy and your users' experience, the translations for some standard object, tab, and field names were changed.

[Enable ICU Locale Formats \(Release Update\)](#)

To do business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20.

Select New Time Zones

To improve accuracy, to enhance integration with external systems, and to support your users wherever they work, users can now select from 430 time zones. With this change, Salesforce supports all time zones in the latest Time Zone Database version, 2021a.

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

SEE ALSO:

[Salesforce Help: Supported Time Zones](#)

[Salesforce Help: Edit Your Language and Locale Settings](#)

Connect with More Customers with New Languages and Locales

To help you do business all over the world, French (Morocco), Greek (Cyprus), Greenlandic, and seven new English locales are available as platform-only languages. Users can also select 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, and users can select the corresponding locales. The locale 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.

- English (Belgium): en_BE
- English (Cyprus): en_CY
- English (Germany): en_DE
- English (Israel): en_IL
- English (Malta): en_MT
- English (Netherlands): en_NL
- English (United Arab Emirates): en_AE
- French (Morocco): fr_MA
- Greek (Cyprus): el_CY
- Greenlandic: kl

In addition to the locales for the new languages, users can select the new Kalaallisut (Greenland) [kl_GL] locale.

SEE ALSO:

[Salesforce Help: Supported Languages](#)

[Salesforce Help: Locales Overview](#)

Prepare for Updated Locale Formats

To provide you with up-to-date formats, we updated the locale formats in Salesforce. We recommend that you evaluate how the format changes affect you. This release includes International Components for Unicode (ICU) version 69.1, which uses Common Locale Data Repository (CLDR) version 39. Whether you're using ICU or Java Development Kit (JDK) locale formats, this change updates the currency symbol for the Yoruba (Benin) locale. If you're using ICU locale formats, this change modifies a date time format for six Chinese locales.

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

Why: For both JDK and ICU formats, the currency for the Yoruba (Benin) locale changed from CFA to F CFA.

Locale Name and Code	Format Type	Winter '22 Format	Summer '21 Format
Yoruba (Benin)	Currency: Positive	F CFA 1,234,567.57	CFA 1,234,567.57
yo_BJ	Currency: Negative	-F CFA 1,234,567.57	-CFA 1,234,567.57
	Accounting Currency: Positive	F CFA 1,234,567.57	CFA 1,234,567.57
	Accounting Currency: Negative	(F CFA 1,234,567.57)	(CFA 1,234,567.57)

If you're using ICU locale formats, the spacing of the medium date time format changed for six Chinese locales.

 **Note:** We recommend viewing this information in [Salesforce Help](#). Not all characters appear correctly in PDFs.

Format Type	Winter '22 Format	Summer '21 Format
Date Time: Medium	2008 1 28 4:30:05	2008 1 28 4:30:05

This updated ICU date time format applies to these locales.

- Chinese [zh]
- Chinese (China) [zh_CN]
- [zh_CN_PINYIN]
- [zh_CN_STROKE]
- Chinese (Malaysia) [zh_MY]
- Chinese (Singapore) [zh_SG]

How: Review the changes to date, time, 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: Determine Whether Your Salesforce Org Is Using ICU or JDK Locale Formats](#)

[Salesforce Help: Locales Overview](#)

Review Updated Label Translations

To improve accuracy and your users' experience, the translations for some standard object, tab, and field names were changed.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions. It affects Bulgarian, Traditional Chinese, Czech, Danish, Dutch, Finnish, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (European), Russian, Slovak, Slovenian, and Turkish language users.

How: To view the updated translations for each language, see the knowledge article, [Winter '22 Translated Terminology Update](#).

If you want to use a different translation for tab and field labels, you can change the name. From Setup, in the Quick Find box, enter *Rename Tabs and Labels*, and then select **Rename Tabs and Labels**.

SEE ALSO:

[Salesforce Help: Rename Object, Tab, and Field Labels](#)

Enable ICU Locale Formats (Release Update)

To do business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. 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 '23. 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: For recently expanded guidance on how to migrate from JDK to ICU locale formats, 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*, and then select **Release Updates**. For Enable ICU Locale Formats, follow the testing and activation steps.

The English (Canada) locale (en_CA) requires separate activation. In the Quick Find box, enter *User Interface*, and select **User Interface**. Select **Enable ICU formats for en_CA locale** and save your changes.

SEE ALSO:

[Salesforce Help: Go Global with New International Locale Formats](#)

[Knowledge Article: Determine Whether Your Salesforce Org Is Using ICU or JDK Locale Formats](#)

[Release Updates](#)

Sharing

Find out how to hide fields containing personal information from external users with an enhanced user management setting. Manage access to sensitive data on contracts, tasks, events, time sheets, and time sheet entries. And limit the default records that your users see so that they only see what's necessary.

IN THIS SECTION:

[Hide More Personal Information Fields from External Users](#)

To prevent external users, such as portal or partner users, from viewing personal information in your user records, enable the Enhanced Personal Information Management permission. Salesforce then blocks view and edit access to 20 fields that are considered personal information. You can configure which fields you consider personal information from User Management Settings. This permission replaces the less-configurable Hide Personal Information setting, which will be retired in the Winter '23 release.

[Control Access to Sensitive Data with Restriction Rules \(Generally Available\)](#)

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, events, time sheets, and time sheet entries. This feature, now generally available, includes some changes since the last release. You can now create and manage restriction rules in Setup as well as with Tooling and Metadata APIs.

[Control the Default Records Your Users See with Scoping Rules \(Beta\)](#)

Reduce noise and unnecessary searches while enhancing your users' productivity. Based on criteria that you select, you can set rules to help your users see only records that are relevant to them. By adding a scoping rule, you can help users focus on pertinent records and prevent them from accessing records containing sensitive or inessential information. Scoping rules don't restrict the record access that your users already have. Your users can still open and report on all records that they have access to per your org's sharing settings

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To prevent external users, such as portal or partner users, from viewing personal information in your user records, enable the Enhanced Personal Information Management permission. Salesforce then blocks view and edit access to 20 fields that are considered personal information. You can configure which fields you consider personal information from User Management Settings. This permission replaces the less-configurable Hide Personal Information setting, which will be retired in the Winter '23 release.

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

Why: When you enable the Enhanced Personal Information Management permission, these fields are masked to external users.

- About Me
- Address
- Alias
- Company Name
- Department
- Division
- Email
- Email Sender Address
- Email Sender Name
- Email Signature
- Employee Number
- Extension
- Fax
- Manager
- Mobile
- SAML Federation ID
- Phone

- Title
- User Photo badge text overlay
- Username

How: You can click to access a user record field directly from this org permission in User Management Settings. Add or remove PersonalInfo from the field's Compliance Categorization area. In the Winter '23 release, this setting will be enforced and the Hide Personal Information setting will be retired.

SEE ALSO:

[Salesforce Help: Manage Personal User Information Visibility for External Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Personal User Information Considerations \(can be outdated or unavailable during release preview\)](#)

Control Access to Sensitive Data with Restriction Rules (Generally Available)

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, events, time sheets, and time sheet entries. This feature, now generally available, includes some changes since the last release. You can now create and manage restriction rules in Setup as well as with Tooling and Metadata APIs.

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

How: To create a restriction rule, navigate to Object Manager in Setup. Select the object that you want to add a restriction rule for. Click **Restriction Rules**. Name and describe the rule and activate it. Select a user field and choose filter settings to determine which users the rule applies to. Then, select a record field and choose filter settings to determine which records are accessible.

SEE ALSO:

[Salesforce Help: Restriction Rules \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Restriction Rule \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Criteria Based Field Level Security \(partially delivered\)](#)

[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 \(partially delivered\)](#)

[IdeaExchange: Separate Contract Sharing Rules \(partially delivered\)](#)

Control the Default Records Your Users See with Scoping Rules (Beta)

Reduce noise and unnecessary searches while enhancing your users' productivity. Based on criteria that you select, you can set rules to help your users see only records that are relevant to them. By adding a scoping rule, you can help users focus on pertinent records and prevent them from accessing records containing sensitive or inessential information. Scoping rules don't restrict the record access that your users already have. Your users can still open and report on all records that they have access to per your org's sharing settings

Where: This change applies to Lightning Experience in Performance and Unlimited 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](#).

How: Scoping rules are available for custom objects and these standard objects.

- Account
- Case
- Contact

- Event
- Lead
- Opportunity
- Task

For information on enabling this feature, contact Salesforce. You can create and modify scoping rules using the Tooling or Metadata API.

Profiles and Permissions

Get the benefits of expanded profile and permission management. Use the power of permission set groups to configure session-based access control. Create custom profiles using the API instead of cloning existing profiles.

IN THIS SECTION:

[Grant Access Based on Activated User Sessions for Permission Set Groups](#)

To grant your users only the access that they need when they need it, combine the management power of permission set groups with session-based access control. Create a session-based permission set group to grant access to permission sets during an activated user session. Previously, you created individual session-based permission sets, but now you can set sessions at the permission set group level as well.

[Create Custom Profiles from Scratch via the SOAP API](#)

It's easier to configure custom profiles to have the permissions you need. Use the Profile SOAP API object to create custom profiles that start without any permissions enabled. Previously, to create a custom profile, you cloned an existing profile in Setup and then removed permissions that you didn't want the assigned users to have. The Profile Metadata API type functions as before.

[Manage Assignment Expiration in Permission Sets and Permission Set Groups \(Beta\)](#)

You can now view and update current assignment expirations for your permission sets and your permission set groups. Previously, to update assignment expirations, you recreated them with the correct expiration date.

[Grant Access to the DeveloperName Field to Users Who Require It](#)

The `DeveloperName` field has new permission requirements for multiple Salesforce objects and types across various APIs. Following the Winter '22 release, some users can lose access to the `DeveloperName` field on objects that they typically interact with. To view, group, sort, or filter the `DeveloperName` field on affected API objects, you must have View Setup and Configuration OR View `DeveloperName` permission.

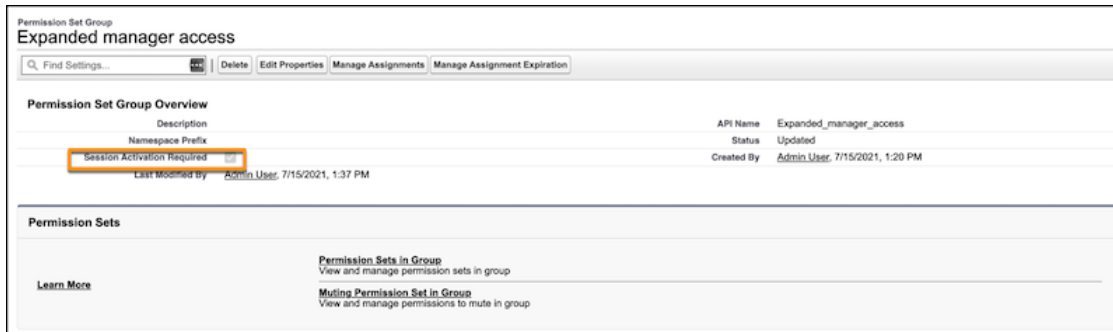
Grant Access Based on Activated User Sessions for Permission Set Groups

To grant your users only the access that they need when they need it, combine the management power of permission set groups with session-based access control. Create a session-based permission set group to grant access to permission sets during an activated user session. Previously, you created individual session-based permission sets, but now you can set sessions at the permission set group level as well.

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

Why: For example, you have a customized Salesforce app that accesses confidential information. For security reasons, you want to limit user access to a predetermined length of time. Some users, such as a team manager, require expanded access for the same length of time. You can create a permission set group that includes the different permission sets required for the confidential access. You can create a flow or use the API to create custom logic to activate the session-based permission set group. In this example, the session-based permission set group activates only when the manager-level users authenticate into your environment using a token. When the token expires, the users must reauthenticate to access the application again.

How: To create a session-based permission set group, select **Session Activation Required** on the Permission Set Group create page. Then, activate the session for the permission set group using a flow or the SessionPermSetActivation SOAP API object.



SEE ALSO:

[Salesforce Help: Session-Based Permission Set Groups \(can be outdated or unavailable during release preview\)](#)

[SOAP API Developer Guide: SessionPermSetActivation \(can be outdated or unavailable during release preview\)](#)

Create Custom Profiles from Scratch via the SOAP API

It's easier to configure custom profiles to have the permissions you need. Use the Profile SOAP API object to create custom profiles that start without any permissions enabled. Previously, to create a custom profile, you cloned an existing profile in Setup and then removed permissions that you didn't want the assigned users to have. The Profile Metadata API type functions as before.

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

How: Use the `create()` call on the Profile SOAP API object and specify the `Description`, `Name`, and `UserLicenseId` fields. You can enable permissions using the API or, after the profile is created, on the profile's page in Setup. Required permissions for the profile's user license are automatically enabled.

SEE ALSO:

[SOAP API Developer Guide: Profile \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create or Clone Profiles \(can be outdated or unavailable during release preview\)](#)

Manage Assignment Expiration in Permission Sets and Permission Set Groups (Beta)



You can now view and update current assignment expirations for your permission sets and your permission set groups. Previously, to update assignment expirations, you recreated them with the correct expiration date.

Where: This change applies to Lightning Experience and Salesforce Classic in all 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 wants consultants to evaluate the 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 for the permission set group when you assign it to users. If the project end is extended, edit the expiration date for the permission set group to the new date.

How: Enable **Permission Set Group Assignments with Expiration Dates (Beta)** in User Management Settings. Then from either the Permission Set Group or Permission Set page, click **Manage Assignment Expiration**. On the Current Assignments page, you can view a list of the users that are assigned to the permission set or the permission set group. To create a user assignment, click **Add Assignment**. To modify the expiration date of existing assignments, click . To remove an assignment, click .

SEE ALSO:

[Salesforce Help: Permission Set and Permission Set Group Assignment Expiration \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Assignment Expiration Details for Users in Permission Sets and Permission Set Groups \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Assignment Expiration Details for Users in Permission Sets and Permission Set Groups \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Grant Access to the DeveloperName Field to Users Who Require It

The `DeveloperName` field has new permission requirements for multiple Salesforce objects and types across various APIs. Following the Winter '22 release, some users can lose access to the `DeveloperName` field on objects that they typically interact with. To view, group, sort, or filter the `DeveloperName` field on affected API objects, you must have View Setup and Configuration OR View `DeveloperName` permission.

Where: This change applies to all editions.

How: Restore access by giving users the View Setup and Configuration OR View `DeveloperName` permission via a profile or permission set. For a list of affected objects and types, see the related knowledge article.

SEE ALSO:

[Knowledge Article: New Permission Requirements for DeveloperName Field \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create User Profiles \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Permission Sets \(can be outdated or unavailable during release preview\)](#)

Einstein Recommendation Builder

Try Einstein and build recommendations at no additional cost. Independent service vendors (ISVs) and partners can now use managed packages to save time and seamlessly share custom recommendations with other Salesforce orgs.

IN THIS SECTION:

[Use a Managed Package to Deploy Custom Recommendations](#)

With a managed package, independent software vendors (ISVs) and partners can define a custom recommendation in a developer org and distribute it to customers. A managed package recommendation is easy to share and includes built-in version support.

[Try Einstein and Build Recommendations Your Way](#)

Discover how AI-driven recommendations can add value to your business. With Einstein, you can recommend anything from products to accounts, parts to work orders, candidates to jobs, and more. Explore how to build and deploy recommendations with little effort. Einstein Recommendation Builder is included in the first 5,000 Next Best Action strategy requests per month at no additional cost. And you can always upgrade for additional requests.

SEE ALSO:

[Einstein Release Notes](#)




Use a Managed Package to Deploy Custom Recommendations

With a managed package, independent software vendors (ISVs) and partners can define a custom recommendation in a developer org and distribute it to customers. A managed package recommendation is easy to share and includes built-in version support.

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

How: Create a custom recommendation in Einstein Recommendation Builder and add it to your managed package in the developer org. After your managed package recommendation is ready, it can be deployed to Enterprise, Performance, and Unlimited edition orgs.

Install your managed package in the subscriber org, and go to the list of recommendations in Einstein Recommendation Builder Setup. An icon identifies a managed package recommendation. Hover over the icon to see the name of the package. From the action menu, build your package. When it's ready, review the scorecard and deploy your recommendation.

 SETUP Einstein Recommendation Builder New					
Status  On					
Einstein Recommendations					
Name	Description	Recipient	Status	Last Modified	
Pool Plus		Account	Pending	07/07/2021, 12:07...	
Pool Pump		Order	Draft	07/07/2021, 11:58...	
Pool Tiles		Order	Draft	06/23/2021, 03:2...	
Jet Fitting		Asset	Draft	06/23/2021, 12:3...	
 Swimming Pool Maintenance Recommendations	Swimming Pool...	Order	Draft	06/11/2021, 10:52...	

SEE ALSO:

[Salesforce Help: Build a Managed Package Recommendation \(can be outdated or unavailable during release preview\)](#)

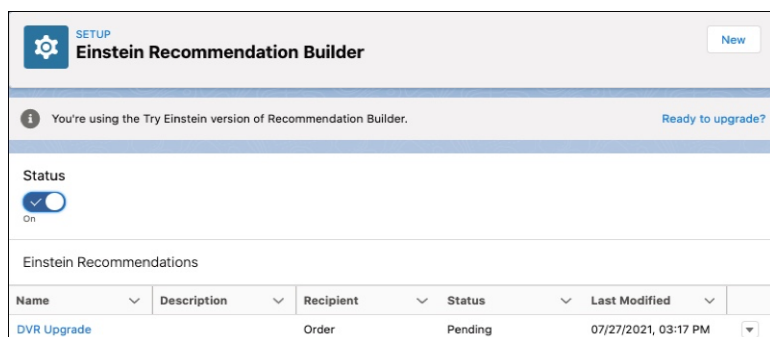
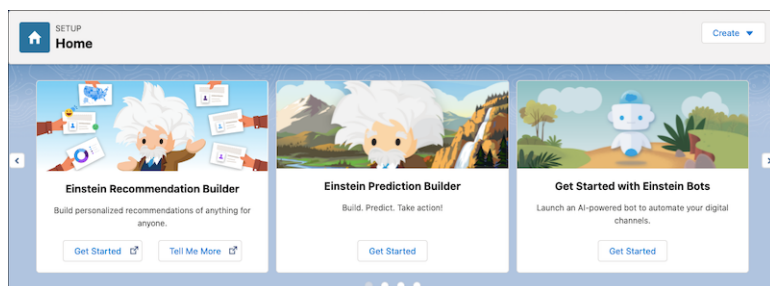
Try Einstein and Build Recommendations Your Way

Discover how AI-driven recommendations can add value to your business. With Einstein, you can recommend anything from products to accounts, parts to work orders, candidates to jobs, and more. Explore how to build and deploy recommendations with little effort. Einstein Recommendation Builder is included in the first 5,000 Next Best Action strategy requests per month at no additional cost. And you can always upgrade for additional requests.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. You can also sign up for a Developer edition org with Einstein Recommendation Builder at no cost.

When: The Try Einstein version of Recommendation Builder is available to customers after 15 October, 2021.

How: From Setup, select Einstein Recommendation Builder. Click **Get Started** to set up Einstein Recommendation Builder. Then build your recommendation.



SEE ALSO:

[Salesforce Help: Einstein Next Best Action Entitlements \(can be outdated or unavailable during release preview\)](#)

General Setup

Edit external object names while syncing, perform sync asynchronously, and create external lookup relationships for table lookup fields.

IN THIS SECTION:

[Get Enhanced Functionality for Syncing an External Data Source](#)

When you sync a table and the external object name conflicts with an existing name, you can edit the name inline and save time and clicks. You can now select to execute a sync operation that's likely to experience a connection timeout as a background operation. Syncing two external data source tables with a lookup relationship field automatically creates an external lookup relationship for the mapped external objects.

Get Enhanced Functionality for Syncing an External Data Source

When you sync a table and the external object name conflicts with an existing name, you can edit the name inline and save time and clicks. You can now select to execute a sync operation that's likely to experience a connection timeout as a background operation. Syncing two external data source tables with a lookup relationship field automatically creates an external lookup relationship for the mapped external objects.

Where: These changes apply to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, Developer, and Performance editions.

How: With inline editing, you can update an external object name without leaving the Validate and Sync page. Take advantage of inline editing if syncing fails because of conflicting object names or if you want to change the default object name.

When you sync a large number of tables, execute the sync operation asynchronously as a background job and avoid connection timeout. You can view the list of sync operations performed as background jobs in the corresponding External Data Source page.

A lookup relationship field on a table is mapped as an external lookup relationship on the external object only if the parent and child objects are synced from the same data source. The parent object must be already synced or the parent and child objects must be in the same sync operation. This auto mapping is supported by Cross Org, OData 4.0, and Custom Apex adapters. For the OData2.0 adapter, it's supported only in the default Olingo library and not supported in OData4J.

SEE ALSO:

[Salesforce Help: Validate and Sync an External Data Source \(can be outdated or unavailable during release preview\)](#)

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](#)

Try the beta client-side security architecture for strong, flexible security for your custom Lightning web components. Configure an event for a Lightning web component by setting up interactions between the source component and its targets right in the App Builder UI. Use the dependencies tree viewer to see which custom components and Apex classes that a Lightning web component uses. The Lightning Component framework now returns a 413 HTTP response status code if there are more than 2,500 actions in a boxcar request. Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your components.

[Einstein Vision and Language](#)

Integrate image recognition and natural language processing into your apps with Einstein Vision and Language APIs. Use Einstein Vision OCR to detect text from multiple tables within an image of a page. Einstein Vision OCR support for PDF files is now generally available. With Einstein Language, create intent models with as few as 20 examples per label. New entities include US Social Security numbers and some credit cards. In standard forms, the address compound entity is detected. Einstein NER (beta) now detects phone service numbers (such as 911) in 15 locales. Read on to see how else Einstein gets your apps working smarter.

[Visualforce](#)

Increase security of your Visualforce pages by reviewing and enabling three release updates.

Apex

Use the `valueOf()` Enum method to convert a specified string to an Enum constant value. Apex supports mock testing of Salesforce Functions with the `FunctionInvokeMock` interface. Call invocable actions from Apex code using the `Invocable.Action` class methods.

API

Legacy versions 7.0 through 20.0 of APIs are deprecated and no longer supported. Legacy versions 21.0 through 30.0 will be deprecated in Summer '22.

Packaging

Remove more metadata components from your second-generation managed packages. Test out the extended developer preview for package conversion from first-generation to second-generation managed packages. Simplify package development by creating and specifying an org shape.

Sandboxes

Updates to our approach to managing the expiration process for inactive sandboxes.

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 Salesforce Lightning principles, design language, and best practices.

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and open language flexibility. Functions allows you to build digital experiences with common abstractions in a single environment for code and low code.

AppExchange Partners

Analyze Tableau CRM analytics usage data with AppExchange App Analytics. Gain new insights into your subscriber behavior with AppExchange App Analytics package usage summary fields. Switch from Usage Metrics to AppExchange App Analytics to access deeper managed package usage data. Increase the power of your managed package usage data with the AppExchange App Analytics Developer Cookbook. Check the return on your AppExchange Marketing Program (AMP) investment in the updated Marketplace Analytics dashboard.

Change Data Capture

Install managed packages released from AppExchange without consuming the default entity selection allocation.

Platform Events

Check out the pilot for filtering platform event streams with channels.

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

Try the beta client-side security architecture for strong, flexible security for your custom Lightning web components. Configure an event for a Lightning web component by setting up interactions between the source component and its targets right in the App Builder UI. Use the dependencies tree viewer to see which custom components and Apex classes that a Lightning web component uses. The Lightning Component framework now returns a 413 HTTP response status code if there are more than 2,500 actions in a boxcar request. Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your components.

 **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:

[Secure Your Components Better, Stronger, Faster with Lightning Web Security \(Beta\)](#)

The Lightning Component framework introduces Lightning Web Security, a new client-side security architecture for your custom Lightning web components. This new architecture is defined by fewer restrictions and more functionality while providing strong sandboxing and a security posture to enforce namespace isolation. The result is strong, flexible, usable security for your Lightning web components.

[Expose Events in the Lightning App Builder](#)

As part of Dynamic Interactions, you can now define the events for a Lightning web component on a page, and then expose those events in the Lightning App Builder. An admin can then configure the event by setting up interactions between the source component and its targets right in the App Builder UI.

[View Dependencies for Lightning Web Components](#)

Use the dependencies tree viewer to see which custom components and Apex classes that a Lightning web component uses. You can quickly see the structure of a component and navigate to the source for its dependencies.

[Limit for Number of Actions in a Boxcar Request Was Added](#)

The Lightning Component framework now returns a 413 HTTP response status code if there are more than 2,500 actions in a boxcar request. Previously, there was no limit and a request with a larger number of actions was rare but led to a slow response time. If a user sees this error, consider redesigning your custom component to follow best practices and reduce the number of actions in a request.

[Add User-Authorized Cookie Consent to Your Lightning Web Components](#)

Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your components. Users can allow one or more specific cookie types: Required, Marketing, Preference, and Statistics.

[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.

[Non-Composed Events Follow Shadow DOM Semantics](#)

Non-composed events previously were visible outside of the shadow root from which they were dispatched. We corrected this behavior so you no longer see non-composed events outside of the shadow root.

[Create Custom Property Editors That Use Literal Values for Complex Data Inputs](#)

For Flow Builder, you can now create a custom property editor that sets a literal value to an input for sObject and Apex-defined data types. Previously, you set a literal value to an input only for primitive data types such as String and Number. Collections of sObject and Apex-defined data types are also supported.

[Lightning Components Release Updates](#)

We're enforcing two release updates. Also, we have a new release update, and an existing release update now affects Lightning components.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

Secure Your Components Better, Stronger, Faster with Lightning Web Security (Beta)

The Lightning Component framework introduces Lightning Web Security, a new client-side security architecture for your custom Lightning web components. This new architecture is defined by fewer restrictions and more functionality while providing strong sandboxing and a security posture to enforce namespace isolation. The result is strong, flexible, usable security for your Lightning web components.

Where: This change applies to custom Lightning web components in Lightning Experience and the Salesforce mobile app. Custom Lightning web components in a managed package also use the new architecture when you enable it. Experience Cloud sites aren't affected if you enable this feature.



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](#).

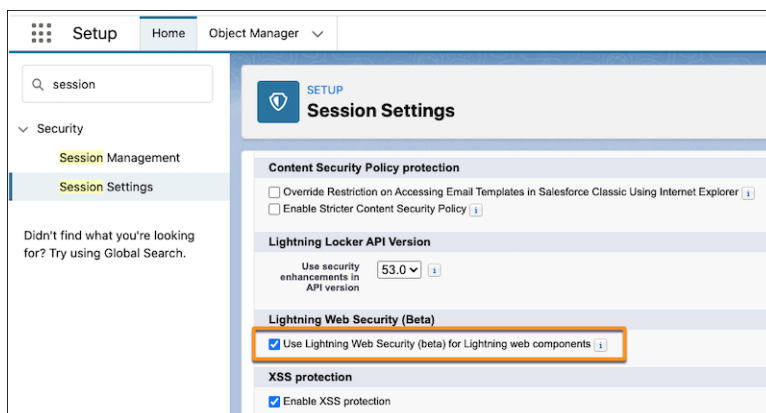
You can opt out of the Beta Service at any time using the same process you use to opt in.

Why: The new Lightning Web Security architecture aims to replace Lightning Locker for Lightning web components. It works along with Lightning Locker, which is still used for Aura components.

Like Lightning Locker, the new security architecture blocks or modifies behavior of APIs that aren't secure. In addition, the new architecture supports features that Lightning Locker doesn't.

- **Cross-namespace component use.** Your Lightning web components can import components or modules from other namespaces and use them via composition or extension. Components are isolated in their own namespace JavaScript sandbox, but it's transparent to you because the security architecture performs virtual communication behind the scenes.
- **Interactions with global objects.** Because each namespace is given its own detached JavaScript sandbox, we can expose `document`, `window`, and `element` global objects directly without needing to use wrappers to protect your components. Lightning Web Security modifies behaviors of those objects to prevent a component from accessing global objects used by components from another namespace.
- **Improved performance.** Execution of your code in the namespace JavaScript sandbox is faster than in Lightning Locker because Lightning Web Security doesn't use secure wrappers, which can reduce performance.
- **Better support of third-party JavaScript.** Libraries can use techniques such as manipulating global objects because they're running in a JavaScript sandbox and their changes to globals don't affect components in other namespaces. In Lightning Locker, such behaviors prevented use of some third-party libraries.
- **Compatibility with standard JavaScript as it evolves.** Lightning Web Security is modeled after the latest TC39 standards that evolve with browser platforms.

How: From Setup, in the Quick Find box enter `session`, and then select **Session Settings**. On the Session Settings page, select **Use Lightning Web Security (beta) for Lightning web components**.



Important: Because Lightning Web Security is a beta quality feature, we strongly recommend that you enable it in a sandbox staging environment first. If testing shows that your components are working well in the sandbox staging environment, turn it on in a production org. You can easily return to using Lightning Locker for LWC components by deselecting the setting.

To report issues, give feedback, and ask questions about the Lightning Web Security beta, go to <https://sfmc.co/NextGenWebSecurity>.

SEE ALSO:

[Lightning Web Components Developer Guide: Develop Secure Code \(can be outdated or unavailable during release preview\)](#)

Expose Events in the Lightning App Builder

As part of Dynamic Interactions, you can now define the events for a Lightning web component on a page, and then expose those events in the Lightning App Builder. An admin can then configure the event by setting up interactions between the source component and its targets right in the App Builder UI.

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

How: To expose an event from a component, you fire a standard JavaScript CustomEvent in its `.js` file. To make the event discoverable, use the Dynamic Interactions–related `targetConfig` subtags in the component `js-meta.xml` file with the target `lightning__AppPage`.

event

Exposes the event for Dynamic Interactions and makes it available for the component in the Lightning App Builder. The `event` subtag supports the `name`, `label`, and `description` attributes.

- `name`—The name of the event as defined in the component's `.js` file. If no `label` attribute is defined, the `name` value is shown in the list of available events for the component in the Lightning App Builder.
- `label`—The admin-friendly label for the event.
- `description`—The description of the event, which displays in an i-bubble on the event label in the Lightning App Builder.

schema

Provides the shape of the event. Content in the `schema` subtag must be in JSON format.

Here's a sample `js-meta.xml` configuration file for a custom Account List source component. It includes an `itemselected` event, and its schema includes `apiName` and `recordId` as defined in the `.js` file.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>53.0</apiVersion>
  <isExposed>true</isExposed>
  <masterLabel>Account List</masterLabel>
  <targets>
    <target>lightning__AppPage</target>
  </targets>
  <targetConfigs>
    <targetConfig targets="lightning__AppPage">
      <property name="apiName" type="String"/>
      <property name="listViewApiName" type="String"/>
      <event name="itemselected" label="Item Selected" description="This event fires
when an item is selected.">
        <schema>
          {
            "type": "object",
```

```

        "properties": {
            "recordId": {
                "type": "string",
                "title": "Record ID"
                "description": "Enter an 18-digit record ID."
            },
            "apiName": {
                "type": "string"
            }
        }
    }
</schema>
</event>
</targetConfig>
</targetConfigs>
<description>Defines an event for an Account List component</description>
</LightningComponentBundle>

```

SEE ALSO:

[Build More Interactive Lightning Pages with Dynamic Interactions](#)

[Lightning Web Components Developer Guide: XML Configuration File Elements](#)

View Dependencies for Lightning Web Components

Use the dependencies tree viewer to see which custom components and Apex classes that a Lightning web component uses. You can quickly see the structure of a component and navigate to the source for its dependencies.

Where: This change applies to Lightning web components in Lightning Experience.

How: From Setup, in the Quick Find box, enter *Lightning Components*, and then select **Lightning Components**.

- To see its dependencies on the detail page, select a Lightning web component.
- To see the details for one of the dependencies, click a link in the **Name** column.

Dependencies Tree					
Search for Lightning Component (Case Sensitive)					
type here...					
<button>Search</button>					
Name	Label	Type	Namespace ...	Api Version	
▼ accountList	accountList	LWC		52	
> AccountListController	AccountListController	ApexClass			
> accountDetail	accountDetail	LWC		52	
▼ accountChild	accountChild	LWC		52	
▼ accountGrandchild	accountGrandchild	LWC		52	
> accountGreatGrandchild	accountGreatGrandc...	LWC		52	

The dependency tree shows up to three levels of dependencies for a component. For example, you can see a component and its nested child, grandchild, and great-grandchild components. To view deeper dependencies, click a link in the **Name** column for one of the nested components.

SEE ALSO:

[Lightning Web Components Developer Guide: Compose Components](#)

Limit for Number of Actions in a Boxcar Request Was Added

The Lightning Component framework now returns a 413 HTTP response status code if there are more than 2,500 actions in a boxcar request. Previously, there was no limit and a request with a larger number of actions was rare but led to a slow response time. If a user sees this error, consider redesigning your custom component to follow best practices and reduce the number of actions in a request.

Where: This change applies to Aura and Lightning web components in Lightning Experience and Salesforce Classic.

How: The framework queues up Apex actions before sending them to the server. This mechanism is largely transparent to you when you're writing code, but it enables the framework to minimize network traffic by batching multiple actions into one request (XHR). The batching of actions is also known as boxcar'ing, similar to a train that couples boxcars together.

The framework uses a stack to track the actions to send to the server. When the browser finishes processing events and JavaScript on the client, the enqueued Apex actions on the stack are sent to the server in a batch.

SEE ALSO:

[Lightning Aura Components Developer Guide: Queueing of Server-Side Actions](#)

[MDN Web Docs: 413 HTTP response status code](#)

Add User-Authorized Cookie Consent to Your Lightning Web Components

Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your components. Users can allow one or more specific cookie types: Required, Marketing, Preference, and Statistics.

Where: This change applies to Lightning web components used in [LWR and Aura sites](#), accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: In Experience Builder on the Security & Privacy tab, turn on **Allow only required cookies for this site**. Your code can then give users the ability to fine-tune consent for the cookie types that they do and don't want to permit.

Import the `userConsentCookie` component method inside your custom component.

```
import {
    setCookieConsent,
    isCategoryAllowedForCurrentConsent,
} from 'lightning/userConsentCookie';
```

Use `setCookieConsent()` to set consent preferences for one or more cookie categories.

```
var consent = {
    "Preferences" : true,
    "Statistics" : true,
    "Marketing" : false
}

Sfdc.Cookie.setCookieConsent(consent);
```

Use `isCategoryAllowedForCurrentConsent()` to check consent for the specified category.

```
isCategoryAllowedForCurrentConsent("Marketing");
```

SEE ALSO:

Component Reference: [lightning/userConsentCookie](#) (can be outdated or unavailable during release preview)

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.

Non-Composed Events Follow Shadow DOM Semantics

Non-composed events previously were visible outside of the shadow root from which they were dispatched. We corrected this behavior so you no longer see non-composed events outside of the shadow root.

Where: This change applies to Lightning web components in Lightning Experience, Salesforce Classic, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in Open Source with the exception of those running with native shadow DOM.

Why: Event composition is a shadow DOM feature that prevents a component from exposing its internal details. Composed events (those with `composed` property set to `true`) are observable to the outside world and should be considered as part of a component's API. We recommend that you keep your component's events private by not having them propagate across the shadow DOM boundary, unless you absolutely must expose that event.

How: If your component relied on this incorrect behavior, we recommend that you update your event configuration by setting the `composed` value to `true`.

Let's say you have the following HTML.

```
<template>
  <div onfoo={handleFoo}>
    <c-parent>
      #shadowRoot <= the non-composed event dispatched on c-child stops here
      <c-child></c-child>
    </c-parent>
  </div>
</template>
```

The `handleFoo` listener no longer sees the `foo` event dispatched from within `c-child` if it was dispatched like this.

```
// child.js
this.dispatchEvent(new CustomEvent('foo', {
```

```
bubbles: true
});
```

The `foo` event isn't visible because it doesn't propagate past the `#shadowRoot` of `c-parent`.

To make the `foo` event visible to the `handleFoo` listener, dispatch the event from within `c-child` using the following configuration.

```
// child.js
this.dispatchEvent(new CustomEvent('foo', {
  bubbles: true,
  composed: true
}));
```



Tip: To prevent a composed event from propagating past a certain point when communicating across multiple component layers, invoke its [stopPropagation\(\)](#) method.

SEE ALSO:

[MDN Web Docs: Event.composed](#)

[Lightning Web Components Developer Guide: Configure Event Propagation](#)

Create Custom Property Editors That Use Literal Values for Complex Data Inputs

For Flow Builder, you can now create a custom property editor that sets a literal value to an input for `sObject` and Apex-defined data types. Previously, you set a literal value to an input only for primitive data types such as `String` and `Number`. Collections of `sObject` and Apex-defined data types are also supported.

Where: This change applies to Lightning web components in Lightning Experience.

Why: Now a custom property editor supports a single complex data input such as a `Contact` data type in a custom flow screen component or invocable action. For example, an admin sets values to inputs via a custom property editor that assembles a JSON structure of an `sObject` or Apex-defined data type. A method dispatches an event to Flow Builder, which receives the event and updates the value in the flow.

Previously, a custom property editor supported inputs only for primitive data types, so a flow screen component or invocable action defined separate inputs for each primitive data type.

How: See [Example: sObject Input for Invocable Actions](#) in [Lightning Web Components Developer Guide](#).

Lightning Components Release Updates

We're enforcing two release updates. Also, we have a new release update, and an existing release update now affects Lightning components.

IN THIS SECTION:

[Securely Access Aura Components \(Release Update\)](#)

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 was first made available in Summer '21 and is enforced in Winter '22.

[Enforce OAuth Scope for Lightning Apps \(Release Update\)](#)

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 was first made available in Summer '21 and is enforced in Winter '22.

[Enforce CORS Allowlist for Lightning Apps \(Release Update\)](#)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server though it's enforced on the browser. This update enforces the allowlist on the server so that disallowed requests are blocked earlier and not processed on the server. This update was first made available in Winter '22.

[Prevent Consecutive API Navigation Calls \(Release Update\)](#)

When the Prevent Consecutive API Navigation Calls release update was first made available, it was presented as only for Visualforce pages. It now also applies to Lightning components. This update was first made available in Summer '20 and scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23.

[Enable Secure Static Resources for Lightning Components \(Release Update\)](#)

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 (Release 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 was first made available in Summer '21 and is enforced in Winter '22.

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

When: This update was first available in 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"`. 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.

How: 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 Updates](#)

Enforce OAuth Scope for Lightning Apps (Release 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 was first made available in Summer '21 and is enforced 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 was first available in 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.

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.



Note:

- If the connected app that defines the scope of the OAuth token is installed from a package, you can't update it so there's nothing to do except to ensure that you've installed the latest version of the package.
- If you have a large number of connected apps, you can review the OAuth scope for each connected app by using [ConnectedApp](#) in the Metadata API.

Use the Login History Setup page to track OAuth logins and the associated connected app used to log in.

1. From Setup, in the Quick Find box, enter *Login History*, then select **Login History**.
2. Look for entries whose *Application* column contains a connected app name and whose *Login Type* column is *Remote Access 2.0*.
3. You can filter this list further from Setup, in the Quick Find box, enter *Session Management*, then select **Session Management**. Cross reference the login history records with entries whose *Session Type* column is *Aura*.

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: Monitor Login History](#)

[Salesforce Help: Enable OAuth Settings for API Integration](#)

[Release Updates](#)

Enforce CORS Allowlist for Lightning Apps (Release Update)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server though it's enforced on the browser. This update enforces the allowlist on the server so that disallowed requests are blocked earlier and not processed on the server. This update was first made available in Winter '22.

Where: This change applies to Lightning Out and other Lightning apps in Lightning Experience and all versions of the Salesforce app.

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: Cross-Origin Resource Sharing (CORS) requests to Lightning apps are blocked unless the request comes from a URL listed in your CORS allowlist. CORS enables web browsers to request resources from origins other than their own. For example, using CORS, JavaScript code at `https://www.example.com` can request a resource from `https://www.salesforce.com`. To access Lightning Out from JavaScript code in a web browser, add the origin requesting the code to your CORS allowlist in Setup.

How: To test this update, we recommend working in a sandbox.

1. From Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**.
2. Find Enforce CORS Allowlist for Lightning Apps, and click **View Details** or **Get Started**.
3. Test that your CORS allowlist includes the external URLs that you allow to make cross-origin requests to Lightning apps in Salesforce.



Note: Find existing CORS violations by monitoring events whose `EventType` field equals *CORS Violation Record* in the `EventLogFile` object. For more information on event monitoring, see this [Trailhead module](#).

SEE ALSO:

[Salesforce Help: Perform Cross-Origin Requests from Web Browsers](#)

[Lightning Web Components Developer Guide: Use Components Outside Salesforce with Lightning Out \(Beta\)](#)

[Release Updates](#)

[Get Information About CORS Violation Records in the EventLogFile](#)

[Share Resources with Browser Extensions](#)

Prevent Consecutive API Navigation Calls (Release Update)

When the Prevent Consecutive API Navigation Calls release update was first made available, it was presented as only for Visualforce pages. It now also applies to Lightning components. This update was first made available in Summer '20 and scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23.

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

When: Salesforce enforces this update in Winter '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

How: Any Visualforce page or Lightning component that uses this API navigation pattern is impacted. Review all affected Visualforce pages and Lightning components. Salesforce will provide a replacement pattern in the future.

SEE ALSO:

[Release Updates](#)

Enable Secure Static Resources for Lightning Components (Release Update)

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 Aura Components Developer Guide: \\$Resource](#)

[Lightning Web Components Developer Guide: Access Static Resources](#)

[Release Updates](#)

Einstein Vision and Language

Integrate image recognition and natural language processing into your apps with Einstein Vision and Language APIs. Use Einstein Vision OCR to detect text from multiple tables within an image of a page. Einstein Vision OCR support for PDF files is now generally available. With Einstein Language, create intent models with as few as 20 examples per label. New entities include US Social Security numbers and some credit cards. In standard forms, the address compound entity is detected. Einstein NER (beta) now detects phone service numbers (such as 911) in 15 locales. Read on to see how else Einstein gets your apps working smarter.

IN THIS SECTION:

[Einstein Vision](#)

Now you can detect text from multiple tables within a single page. And Einstein OCR support for PDF files, which was beta in the Winter '21 release, is now generally available. For Einstein Object Detection, the new `object-detection-v2` algorithm reduces the minimum number of bounding-box attributes required to train a dataset to 50. And if a standard form field contains address information, the discrete components of the address are loaded into the separate fields of street, city, state, and ZIP code.

[Einstein Language](#)

You can create intent models with less data—as few as 20 examples per label. US Social Security numbers and credit card numbers from eight card issuers are recognized. And Einstein NER (beta) now detects phone service numbers (such as 911) in 15 locales.

SEE ALSO:

[Einstein Release Notes](#)

Einstein Vision

Now you can detect text from multiple tables within a single page. And Einstein OCR support for PDF files, which was beta in the Winter '21 release, is now generally available. For Einstein Object Detection, the new `object-detection-v2` algorithm reduces the minimum number of bounding-box attributes required to train a dataset to 50. And if a standard form field contains address information, the discrete components of the address are loaded into the separate fields of street, city, state, and ZIP code.

IN THIS SECTION:

[Use Images with Multiple Tables on a Page](#)

You can now process images that contain a mix of tables on a single page. Previously, only one table was permitted. Use Einstein OCR to read tabular data from an image. A single JSON response includes all the data found. Tables that span multiple pages are processed as separate tables.

[Detect Text in PDFs with Einstein OCR \(Generally Available\)](#)

Use Einstein OCR (optical character recognition) to detect text in PDF format.

[Train and Retrain a Dataset with Less Data](#)

The new `object-detection-v2` algorithm reduces the minimum number of bounding boxes of annotation per object required to train a dataset to 50. Previously, the minimum needed to train and retrain data was 200 bounding boxes. We still support the `object-detection-v1` algorithm.

[Support for Compound Fields in Standard Forms](#)

When the value of a form field is detected as an address entity, it's treated as a compound field. Separate fields populated with street, city, state, postal code (ZIP code), and country are returned in the `normalizedText` field.

SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision](#)

Use Images with Multiple Tables on a Page

You can now process images that contain a mix of tables on a single page. Previously, only one table was permitted. Use Einstein OCR to read tabular data from an image. A single JSON response includes all the data found. Tables that span multiple pages are processed as separate tables.

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: Detect Text](#)

Detect Text in PDFs with Einstein OCR (Generally Available)

Use Einstein OCR (optical character recognition) to detect text in PDF format.

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: Use either the `sampleLocation` parameter or the `sampleContent` parameter. Here's an example of a cURL call to the OCR endpoint.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F
  sampleLocation="https://www.cloudkicks.com/annual_report.pdf" -F
  task="text" -F modelId="OCRModel" https://api.einstein.ai/v2/vision/ocr
```

SEE ALSO:

[Einstein Platform Services Developer Guide: What is Einstein OCR](#)

[Einstein Platform Services Developer Guide: Detect Text](#)

Train and Retrain a Dataset with Less Data

The new `object-detection-v2` algorithm reduces the minimum number of bounding boxes of annotation per object required to train a dataset to 50. Previously, the minimum needed to train and retrain data was 200 bounding boxes. We still support the `object-detection-v1` algorithm.

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: Train or retrain datasets using one of these API calls by specifying `object-detection-v2` for the `algorithm` parameter.

- POST `/v2/vision/train`
- POST `/v2/vision/retrain`

SEE ALSO:

[Einstein Platform Services Developer Guide: Train a Dataset](#)

[Einstein Platform Services Developer Guide: Retrain a Dataset](#)

Support for Compound Fields in Standard Forms

When the value of a form field is detected as an address entity, it's treated as a compound field. Separate fields populated with street, city, state, postal code (ZIP code), and country are returned in the `normalizedText` field.

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: Detect Text in Standard Forms](#)

Einstein Language

You can create intent models with less data—as few as 20 examples per label. US Social Security numbers and credit card numbers from eight card issuers are recognized. And Einstein NER (beta) now detects phone service numbers (such as 911) in 15 locales.

IN THIS SECTION:

[Match Credit Card and US Social Security Numbers \(Beta\)](#)

Use Einstein NER (beta) to recognize credit card numbers from eight issuers: American Express, Diner's Club, Discover, Japan Credit Bureau, Maestro Card, Mastercard, Visa, and a general purpose *other* card. We also support US Social Security numbers. Einstein NER supports a range of number formats, including the presence or lack of delimiters, which gives you flexibility with some possible variations in credit card and Social Security numbers.

[Create an Einstein Intent Model with Less Data](#)

Sometimes you don't have much data or you don't have the wide variety of examples required to create an accurate model. When you create an intent dataset, which is what a model is created from, we now recommend just a minimum of 20 examples per label. Previously, we recommended a minimum of 50 examples.

[Match Phone Service Numbers in 15 Locales](#)

Einstein NER (beta) can now detect and recognize emergency and service numbers (such as 112 and 911) for 15 locales (de, da, en_gb, en_us, es, fr, it, ja, ko, nl_nl, pt_pt, pt_br, ru, sv, zh_cn, zh_tw).

SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language](#)

Match Credit Card and US Social Security Numbers (Beta)

Use Einstein NER (beta) to recognize credit card numbers from eight issuers: American Express, Diner's Club, Discover, Japan Credit Bureau, Maestro Card, Mastercard, Visa, and a general purpose *other* card. We also support US Social Security numbers. Einstein NER supports a range of number formats, including the presence or lack of delimiters, which gives you flexibility with some possible variations in credit card and Social Security numbers.

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: This Einstein NER feature is a Beta Service. Customer may opt to try this 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:

[Einstein Platform Services Developer Guide: Entity Reference](#)

Create an Einstein Intent Model with Less Data

Sometimes you don't have much data or you don't have the wide variety of examples required to create an accurate model. When you create an intent dataset, which is what a model is created from, we now recommend just a minimum of 20 examples per label. Previously, we recommended a minimum of 50 examples.

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: This change applies to datasets with a type of `text-intent`. You create an intent dataset using one of these API calls.

- Create a dataset asynchronously—POST `/v2/language/datasets/upload`
- Create a dataset synchronously—POST `/v2/language/datasets/upload/sync`

If you create an intent dataset with less data (a minimum of 20 examples per label), use either the `multilingual-intent` or `multilingual-intent-ood` algorithm when you train the dataset to create a model.

SEE ALSO:

[Einstein Platform Services Developer Guide: Create a Dataset From a File Asynchronously](#)

[Einstein Platform Services Developer Guide: Create a Dataset Synchronously](#)

[Einstein Platform Services Developer Guide: Train a Dataset](#)

Match Phone Service Numbers in 15 Locales

Einstein NER (beta) can now detect and recognize emergency and service numbers (such as 112 and 911) for 15 locales (de, da, en_gb, en_us, es, fr, it, ja, ko, nl_nl, pt_pt, pt_br, ru, sv, zh_cn, zh_tw).

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: This Einstein NER feature is a Beta Service. Customer may opt to try this 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:

[Einstein Platform Services Developer Guide: Einstein OCR Model Card: Phone Number Formats](#)

Visualforce

Increase security of your Visualforce pages by reviewing and enabling three release updates.

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 \(Release Update\)](#)

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 was first made available in Spring '21 and is enforced in Winter '22.

[Prevent Consecutive API Navigation Calls in Visualforce Pages \(Release Update\)](#)

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 and scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23.

[Visualforce Expression Language Apex Method Access Modifier Enforcement \(Release Update\)](#)

When accessing Apex methods defined by custom controllers, the Visualforce Expression Language doesn't correctly validate the access modifiers of the method. Developers can sometimes access unauthorized data on managed and system classes. To improve security, this update validates the Apex method access modifier and throws an error if the Visualforce Expression Language can't access it. This update was first made available in Winter '22.

Securely Call the Visualforce Remoting API (Release 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 was first made available in Spring '21 and is enforced in Winter '22.

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 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 that 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 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*, and then select **Release Updates**.
2. For Enable Visualforce JavaScript Remoting Enforcement, follow the testing steps, but don't activate the release update yet.
3. 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){...}  
    ...
```

4. To see which Visualforce Remoting API calls fail validation, enable the release update test run. Manually test any page that uses remoting. Watch for any exceptions and failed validations in the console log.

5. 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.

6. More complex failures that don't have a simple resolution can require you to redesign parts of your application. For more information, see [Declaring a Remote Method with Interface Parameters](#).

For example, if an `apexType` value isn't accessible, redesign the Visualforce Remoting API usage so that you don't use the invalid `apexType` value.

7. When manual testing is complete, disable the release update test run and transfer the code changes to production.
8. In production, enable the release update or wait for it to auto-enable in Winter '22.

SEE ALSO:

[Release Updates](#)

Prevent Consecutive API Navigation Calls in Visualforce Pages (Release 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 and scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23.

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

When: Salesforce enforces this update in Winter '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

Why: Firing consecutive API navigation calls in a Visualforce page can lead to unwanted behavior due to competing API calls. To prevent any issues, with this release update, only the first API navigation call is accepted. This release update ensures predictable and stable behavior in your org.

How: Any Visualforce pages that use this API navigation pattern are impacted. Review all affected Visualforce pages. Salesforce will provide a replacement pattern in the future. Alternatively, edit your pages to use Lightning components instead.

SEE ALSO:

[Release Updates](#)

Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

When accessing Apex methods defined by custom controllers, the Visualforce Expression Language doesn't correctly validate the access modifiers of the method. Developers can sometimes access unauthorized data on managed and system classes. To improve security, this update validates the Apex method access modifier and throws an error if the Visualforce Expression Language can't access it. This update was first made available in Winter '22.

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.

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Visualforce Expression Language Apex Method Access Modifier Enforcement, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

Apex

Use the `valueOf()` Enum method to convert a specified string to an Enum constant value. Apex supports mock testing of Salesforce Functions with the `FunctionInvokeMock` interface. Call invocable actions from Apex code using the `Invocable.Action` class methods.

For more information on these enhancements, refer to the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

IN THIS SECTION:

[Use the `valueOf\(\)` Enum Method to Convert a Specified String to an Enum Constant Value](#)

The `valueOf()` enum method converts a specified string to an enum constant value. An exception is thrown if the input string doesn't match an enum value. In previous releases, using this method resulted in a runtime error.

[Use Mock Responses to Test Salesforce Functions](#)

Apex now supports mock testing of Salesforce Functions. Use the existing `Test.setMock()` method with the new `FunctionInvokeMock` interface and `MockFunctionInvocationFactory` class methods to mock test Salesforce Functions.

[Call Invocable Actions from Apex \(Developer Preview\)](#)

`Invocable.Action` is a new Apex class that allows you to call invocable actions from Apex code. For the developer preview, this feature is available only in scratch orgs.

SEE ALSO:

[Apex: New and Changed Items](#)

Use the `valueOf()` Enum Method to Convert a Specified String to an Enum Constant Value

The `valueOf()` enum method converts a specified string to an enum constant value. An exception is thrown if the input string doesn't match an enum value. In previous releases, using this method resulted in a runtime error.

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

How: You can use the method for both system and user-defined enums. This example uses the method to convert a string to a known season enum value.

```
public enum Season {WINTER, SPRING, SUMMER, FALL}

string currentSeasonInput = 'winter';
Season currentSeason = Season.valueOf(currentSeasonInput);
```

Use Mock Responses to Test Salesforce Functions

Apex now supports mock testing of Salesforce Functions. Use the existing `Test.setMock()` method with the new `FunctionInvokeMock` interface and `MockFunctionInvocationFactory` class methods to mock test Salesforce Functions.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Function testing methods are only enabled in Salesforce orgs that are configured to work with Salesforce Functions.

Why: Salesforce Functions can only be invoked by Apex test methods via mocks. Use mock responses to support effective testing and mocking of Salesforce Functions integrations, while also meeting the minimum 75% Apex code coverage requirement.

How: Provide an implementation for the `Functions.FunctionInvokeMock` interface to specify the response sent to the `respond()` method, which the Apex runtime calls to send a response for the function.

```
@isTest
public class FunctionsInvokeMockImpl implements functions.FunctionInvokeMock {
    public functions.FunctionInvocation respond(String functionName, String payload) {
        // return mock success response
        String invocationId = '0000000000000000';
        String response = 'mockResponse';
        return functions.MockFunctionInvocationFactory.createSuccessResponse(invocationId,
            response);
    }
}
```


Next, instruct the Apex runtime to send this mock response by calling `Test.setMock()` in your test method:

```
Test.setMock( functions.FunctionInvokeMock.class, new FunctionInvokeMockImpl())
```

The first argument to `Test.setMock()` is `functions.FunctionInvokeMock.class`, and the second argument is a new instance of your implementation of the `FunctionInvokeMock` interface.

After the `Test.setMock()` method is called, Salesforce Functions that are called in the test context aren't invoked. The mock response specified in the `respond()` method is received instead.

Use the `createSuccessResponse()` and `createErrorResponse()` methods in the `MockFunctionInvocationFactory` class to generate appropriate success or error messages.

 **Note:** The mock doesn't affect the `Functions.Function.get` method, which checks that the mocked function exists.

This example shows the minimal setup required for testing synchronous and asynchronous functions and is simplified to include both function invocations and the `FunctionCallback` class.

```
@isTest
public class FunctionTest {
    @isTest
    static void testSyncFunctionCall() {
        // Set mock class to respond to function invocations
    }
}
```

```

Test.setMock( functions.FunctionInvokeMock.class, new FunctionsInvokeMockInner());

functions.Function mockedFunction = functions.Function.get('example.function');

Test.startTest();
// Synchronous function call
functions.FunctionInvocation invokeResult = mockedFunction.invoke('{}');
Test.stopTest();

// Verify that the received response contains expected mock values
System.assertEquals(functions.FunctionInvocationStatus.SUCCESS,
invokeResult.getStatus());
System.assertEquals('mockResponse', invokeResult.getResponse());
System.assertEquals('0000000000000000', invokeResult.getInvocationId());

}

@isTest
static void testAsyncFunctionCall() {
    // Set mock class to respond to function invocations
    Test.setMock( functions.FunctionInvokeMock.class, new
FunctionsInvokeMockInner());

    functions.Function mockedFunction = functions.Function.get('example.function2');

    Test.startTest();
    //Asynchronous function invocation with callback
    mockedFunction.invoke('{}', new DemoCallback());
    Test.stopTest();
    // Include assertions here about the expected callback processing
}

public class DemoCallback implements functions.FunctionCallback {
    public void handleResponse(functions.FunctionInvocation invokeResult) {
        // Handle result of function invocation
        // The callback is included in the example here for convenience
        // It would normally be defined in the classes being tested

        // Verify that the received response contains expected mock values
        System.assertEquals(invokeResult.getStatus(),
functions.FunctionInvocationStatus.ERROR);
        functions.FunctionInvocationError resultError = invokeResult.getError();
        System.assertEquals('bang', invokeResult.getError().getMessage());
        System.assertEquals('0000000000000000', invokeResult.getInvocationId());
    }
}

public class FunctionsInvokeMockInner implements functions.FunctionInvokeMock {
    public functions.FunctionInvocation respond(String functionName, String payload)

```

```

{
    // return mock success response
    String invocationId = '0000000000000000';

    if(functionName == 'example.function2') {
        return functions.MockFunctionInvocationFactory.createErrorResponse(
            invocationId,
            functions.FunctionErrorType.FUNCTION_EXCEPTION,
            'bang');
    }

    String response = 'mockResponse';
    return
functions.MockFunctionInvocationFactory.createSuccessResponse(invocationId, response);

    }
}

```

Call Invocable Actions from Apex (Developer Preview)

Invocable.Action is a new Apex class that allows you to call invocable actions from Apex code. For the developer preview, this feature is available only in scratch orgs.

Where: This change applies to Lightning Experience and Salesforce Classic scratch orgs.



Note: Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

How: To enable this feature in your scratch org, add a reference to `CallIAFromApex` in the project-scratch-def.json file in your SFDX project.

```

{
  "orgName": "my company", "edition": "Developer",
  "features": [ "CallIAFromApex" ],
  "settings": {
    ...
  }
}

```

After you've added to your scratch org definition file, reference `Invocable.Action` in your Apex code. This example uses the standard invocable action "chatterPost" to post a message to the current user's feed.

```

Invocable.Action action = Invocable.Action.createStandardAction('chatterPost');
action.setInvocationParameter('text', 'This is a test.');
```

```

action.setInvocationParameter('type', 'User');
```

```

action.setInvocationParameter('subjectNameOrId', UserInfo.getUserId());
```

```

List<Invocable.Action.Result> results = action.invoke();
```

```

if (results.size() > 0 && results[0].isSuccess()) {
```

```

    System.debug('Created feed item with ID: ' +
```

```
results[0].getOutputParameters().get('feedItemId'));
}
```

This example calls a custom invocable action named Doubler that returns a number that's twice the input value.

```
Invocable.Action action = Invocable.Action.createCustomAction('apex', 'Doubler');
action.setInvocationParameter('input', 1);
List<Invocable.Action.Result> results = action.invoke();

if (results.size() > 0 && results[0].isSuccess()) {
    System.debug('Result is: ' + results[0].getOutputParameters().get('output'));
}
```

SEE ALSO:

[Invocable Namespace \(Developer Preview\)](#)

API

Legacy versions 7.0 through 20.0 of APIs are deprecated and no longer supported. Legacy versions 21.0 through 30.0 will be deprecated in Summer '22.

IN THIS SECTION:

[Legacy API Versions 7.0 Through 20.0 Have Been Retired](#)

Versions 7.0 through 20.0 of the Salesforce Platform API are now deprecated and are no longer supported by Salesforce.

[Legacy API Versions 21.0 Through 30.0 Are Being Retired](#)

In the Summer '22 release, versions 21.0 through 30.0 of the Salesforce Platform API will be deprecated and no longer supported by Salesforce.

[Note the updated referenceTo values on describeSObjects\(\) in Tooling API](#)

In API version 53.0 and later, the `referenceTo` values of a `Field` object within a Tooling REST or SOAP API `describeSObjects()` response now include the correct API names. Previously, the `referenceTo` values included incorrect names of some metadata types that each `Field` object is able to reference.

Legacy API Versions 7.0 Through 20.0 Have Been Retired

Versions 7.0 through 20.0 of the Salesforce Platform API are now deprecated and are no longer supported by Salesforce.

Where: This change affects these API versions:

Bulk API

16.0, 17.0, 18.0, 19.0, 20.0

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



Note: This affects *all* REST APIs that use URLs beneath `/services/data/vXX.X/`.

This change applies to Salesforce Classic and Lightning Experience in Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled org editions.

When: You can continue to use these legacy API versions until Summer '22 is released. At that time these legacy versions will be 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 has been deactivated.

How: Before the Summer '22 release, customers and partners must modify or upgrade their applications to function with more current API versions.

For more information, see [Salesforce Platform API Versions 7.0 through 20.0 Retirement](#).

Legacy API Versions 21.0 Through 30.0 Are Being Retired

In the Summer '22 release, versions 21.0 through 30.0 of the Salesforce Platform API will be deprecated and no longer supported by Salesforce.

Where: This change affects these API versions:

Bulk API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

SOAP API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

REST API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0



Note: This affects all REST APIs that use URLs beneath `/services/data/vXX.X/`, including:

- Bulk API
- Connect REST API
- IoT REST API
- Lightning Platform REST API
- Metadata API
- Place Order REST API
- Reports and Dashboards REST API
- Tableau CRM REST API
- Tooling API

This change applies to Salesforce Classic and Lightning Experience in Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled org editions.

When: You can continue to use these legacy API versions until Summer '23 is released. At that time, these legacy versions will be 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 has been deactivated.

How:

- Before the Summer '22 release, customers and partners should modify or upgrade their applications to function with more current API versions available to prevent disruption. Moving to newer versions of our APIs offers advanced capabilities with improved security and performance.
- Before the Summer '23 release, customers and partners must modify or upgrade their applications to function with more current API versions.

For more information, see [Salesforce Platform API Versions 21.0 through 30.0 Retirement](#).

Note the updated `referenceTo` values on `describeObjects()` in Tooling API

In API version 53.0 and later, the `referenceTo` values of a `Field` object within a Tooling REST or SOAP API `describeObjects()` response now include the correct API names. Previously, the `referenceTo` values included incorrect names of some metadata types that each `Field` object is able to reference.

SEE ALSO:

[Tooling API Developer Guide: describeObjects\(\) SOAP Call](#)

Packaging

Remove more metadata components from your second-generation managed packages. Test out the extended developer preview for package conversion from first-generation to second-generation managed packages. Simplify package development by creating and specifying an org shape.

IN THIS SECTION:

[Remove Metadata Components from Second-Generation Managed Packages \(Beta\)](#)

Remove metadata components that you no longer want in your second-generation managed packages (2GP). The list of metadata components that can be removed from 2GP packages is now expanded.

[Get an Early Look at Converting First-Generation Managed Packages \(Developer Preview\)](#)

This extended developer preview provides a sneak peek into how we're designing the conversion of first-generation managed packages to second-generation managed packages. With more capabilities, you can convert a first-generation managed package and install the newly created second-generation managed package in a scratch org. In Winter '22, we're accepting new participants, try it out, and share your experiences with us.

[Simplify Package Development by Creating and Specifying an Org Shape](#)

If your package's metadata depends on a complex set of features, settings, or licenses, it can be difficult to declaratively specify these dependencies in a scratch org definition file. Instead, create an org shape of your production org, or another development org, and specify that source org's ID in your scratch org definition file. During package creation, we mimic the source org's environment when we build and validate your package's metadata.

[Manage First-Generation Managed Packages More Easily](#)

Now you can sort your list of packages on the Package Manager page in Setup. You can also filter by beta or released, or search by version name, version number, or component name.

[View Your Progress During Package Uninstalls](#)

The Installed Packages page in Setup now helps identify whether a package uninstall request is stuck. Subscribers can see which specific phase of the uninstall process they're in and how many components have been removed. Subscribers can also cancel an uninstall that is in progress.

[Remove Invalid Characters from Managed Package Translations](#)

To prevent issues with displaying translated text in Salesforce, the validation checks for the `CustomObjectTranslation` metadata type no longer accept these characters: `#`, `$`, `%`, `;`, `<`, `=`, `>`, `[`, `]`, `^`, ```, `|`, and `~`. To prevent package deployment issues, remove those invalid characters from translation text in your managed package.

Remove Metadata Components from Second-Generation Managed Packages (Beta)

Remove metadata components that you no longer want in your second-generation managed packages (2GP). The list of metadata components that can be removed from 2GP packages is now expanded.

Where: This change applies to second-generation managed packages.



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](#). You can provide feedback and suggestions for Remove Metadata Components from 2GP in the [Managed Packages](#) group in the Partner Community.

How: To request access to this feature, log a case at <https://partners.salesforce.com/partnerSupport>. After this feature is enabled, remove the metadata component's source file from your Salesforce DX project, and create a new package version. To learn which metadata components you can remove, see [Remove Metadata Components from Second-Generation Managed Packages](#) in the *Salesforce DX Developer Guide*.

Get an Early Look at Converting First-Generation Managed Packages (Developer Preview)

This extended developer preview provides a sneak peek into how we're designing the conversion of first-generation managed packages to second-generation managed packages. With more capabilities, you can convert a first-generation managed package and install the newly created second-generation managed package in a scratch org. In Winter '22, we're accepting new participants, try it out, and share your experiences with us.

Where: This change applies to managed package versions created using Salesforce CLI or Tooling API.



Note: First-Generation Managed Package Conversion is available as a developer preview. It isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

How: For details on participating in this developer preview, see the sidebar in the [1GP=>2GP Migration - Developer Preview](#) group in the Partner Community.

Simplify Package Development by Creating and Specifying an Org Shape

If your package's metadata depends on a complex set of features, settings, or licenses, it can be difficult to declaratively specify these dependencies in a scratch org definition file. Instead, create an org shape of your production org, or another development org, and specify that source org's ID in your scratch org definition file. During package creation, we mimic the source org's environment when we build and validate your package's metadata.

Where: This change applies to unlocked and second-generation managed packages.



Note: This feature depends on Org Shape for Scratch Orgs, which 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: Org Shape for Scratch Orgs is a beta feature. It doesn't currently include every feature, setting, and limit. In these cases, you must manually specify these features and settings in your scratch org definition file. Before using this feature, get familiar with how [Org Shape for Scratch Orgs](#) works. Then enable the scratch org setting in your source org, generate the org shape, and edit your scratch org definition file to include the org name and 15-character source org ID.

```
{
  "orgName": "Acme",
  "sourceOrg": "00DB1230400Ifx5"
}
```

Manage First-Generation Managed Packages More Easily

Now you can sort your list of packages on the Package Manager page in Setup. You can also filter by beta or released, or search by version name, version number, or component name.

Where: This change applies to first-generation managed packages.

How: From Setup, in the Quick Find box, enter *Package Manager*, and then select **Package Manager**.

View Your Progress During Package Uninstalls

The Installed Packages page in Setup now helps identify whether a package uninstall request is stuck. Subscribers can see which specific phase of the uninstall process they're in and how many components have been removed. Subscribers can also cancel an uninstall that is in progress.

Where: This change applies to unlocked packages and first- and second-generation managed packages.

How: To view in-progress package uninstalls, from Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.

Remove Invalid Characters from Managed Package Translations

To prevent issues with displaying translated text in Salesforce, the validation checks for the CustomObjectTranslation metadata type no longer accept these characters: #, \$, %, ;, <, =, >, [,], ^, ` , |, and ~. To prevent package deployment issues, remove those invalid characters from translation text in your managed package.

Where: This change applies to unlocked and first- and second-generation managed packages with translations.

How: If your managed package includes translations, test deploying your package in a sandbox that's on Winter '22. If the deployment fails due to invalid characters in CustomObjectTranslation, review the translations included in your package and remove the invalid characters.

Sandboxes

Updates to our approach to managing the expiration process for inactive sandboxes.

IN THIS SECTION:

[Updates to Inactive Sandbox Expiration Process](#)

We've streamlined our approach to managing the expiration process for inactive sandboxes in Winter '22. Salesforce performs a routine cleanup of inactive sandboxes to better utilize capacity and support growth. A sandbox is considered inactive if it hasn't been accessed for 180 days.

Updates to Inactive Sandbox Expiration Process

We've streamlined our approach to managing the expiration process for inactive sandboxes in Winter '22. Salesforce performs a routine cleanup of inactive sandboxes to better utilize capacity and support growth. A sandbox is considered inactive if it hasn't been accessed for 180 days.

Where: This change applies to inactive sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

Who: All users in the production org with the Modify All Data user permission and the user that requested the sandbox will be notified of the upcoming expiration date.

How: We'll send out automated email notifications for inactive sandboxes at 90, 120, and 150 days. You'll receive a final email notifying you that your sandbox has been deleted at 180 days.

SEE ALSO:

[Salesforce Help: Inactive Sandbox Expiration](#)

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.

Where: This change applies to all editions.

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 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 and when they were completed. The changes are also rolled up into the next major Salesforce release. Here are some highlights for Winter '22.

IN THIS SECTION:

[Accessibility Updates for Selection List Components](#)

In accordance with ARIA 1.2 guidance, the `input` was replaced with `button` in components that contain select-only comboboxes.

[Lightning Design System Component Blueprint Updates](#)

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

Accessibility Updates for Selection List Components

In accordance with ARIA 1.2 guidance, the `input` was replaced with `button` in components that contain select-only comboboxes.

Where: This change applies to these component blueprints.

- Datetime Picker
- Docked Composer
- Dynamic Menu
- Expression
- Global Header
- List builder
- Lookups
- Picklist
- Rich Text Editor
- Timepicker

Lightning Design System Component Blueprint Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

Buttons

Added `aria-pressed` attribute to stateful button variants.

Cards

Added annotations for Einstein themed cards.

Combobox

Changed the `slds-combobox__input` element from `input` to `button` per ARIA 1.2 guidance for select-only comboboxes.

Updated to ARIA 1.2 compliance, where these attributes are moved to `input` or `button` in the case of select-only:
`role="combobox", aria-expanded, aria-haspopup="listbox".`

Changed the `@restrict` annotation of `.slds-combobox__input` from `.slds-combobox input` to `.slds-combobox__form-element input, .slds-combobox__form-element button`.

Changed the `@restrict` annotation of `.slds-combobox__input-value` from `.slds-combobox input` to `.slds-combobox__input`.

Data Tables

Changed the `aria-live` value from `assertive` to `polite`.

Added `aria-label` and `aria-labelledby` to allow adding additional table context for screen readers.

Datepickers

Added examples for Required and Required with Error states.

Added hover style for dates.

Added `aria-label` to provide the full DD MM YYYY text of the date.

Fixed missing attribute `aria-current="date"` when today's date falls inside of a selected range.

Datetime Picker

Added hover style for dates.

Added `aria-label` to provide the full DD MM YYYY text of the date.

Removed the usage of the deprecated combobox. The Datetime Picker now uses the current combobox.

Dynamic Menu

Removed the usage of the deprecated combobox. The Dynamic Menu now uses the current combobox.

Form Element

Correctly position help text under the corresponding input when in horizontal layout.

Input

Created new class `slds-input_faux` to style read-only "inputs" where necessary for accessibility best practices, like combobox.

List Builder

Removed the usage of the deprecated combobox. The List Builder now uses the current combobox.

Updated combobox to ARIA 1.2 compliance.

Lookups

Updated combobox to ARIA 1.2 compliance.

Menus

Added `aria-expanded` attribute to menu triggers with value dependent on menu's open state.

Panels

Added `aria-pressed` attribute to Panel toggle button.

Picklist

Removed the usage of the deprecated combobox. The Picklist now uses the current combobox.

Progress Bar

Added `aria-label` attribute to the `div` with role of progressbar to meet accessibility requirements.

Progress Indicator

Added `aria-label` attribute to the `div` with role of progressbar to meet accessibility requirements.

Progress Ring

Completed progress rings now use `color-background-success-dark` design token.

Rich Text Editor

Removed the usage of the deprecated combobox. The Rich Text Editor now uses the current combobox.

Updated combobox to ARIA 1.2 compliance.

Setup Assistant

Updated checkbox toggle examples to use Off/On label and updated header text in alignment with text standards.

Switched the variant of the progress bar used in setup assistant from `success` to `base`.

Timepicker

Removed the usage of the deprecated combobox. The Timepicker now uses the current combobox.

Toast

Corrected accessibility information regarding the usage of the role attribute.

Vertical Navigation

Replaced checked radio group navigation item background token with `BRAND_BACKGROUND_PRIMARY` branding token.

Welcome Mat

Added `aria-label` attribute to the `div` with role of progressbar to meet accessibility requirements.

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and open language flexibility. Functions allows you to build digital experiences with common abstractions in a single environment for code and low code.

IN THIS SECTION:[Unleash the Power of Elastic Compute with Salesforce Functions \(Generally Available\)](#)

Salesforce Functions empowers teams to focus on delivering apps and business logic fast instead of managing infrastructure. Your Salesforce app can now use additional programming languages and open-source or third-party frameworks, saving you development time and effort.

Unleash the Power of Elastic Compute with Salesforce Functions (Generally Available)

Salesforce Functions empowers teams to focus on delivering apps and business logic fast instead of managing infrastructure. Your Salesforce app can now use additional programming languages and open-source or third-party frameworks, saving you development time and effort.

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

When: Salesforce Functions is now generally available. See the [overview](#), announcement, and details on [developer.salesforce.com](#) and in the Salesforce Functions Trailblazer Community.

Why: With Functions, you can deploy code in a serverless environment, enabling you to run computationally heavy operations on demand. Functions also enable teams to accelerate productivity by making it easy for developers to adopt common industry languages and their supporting ecosystems, as well as the development tools of their choice. 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: A Salesforce Functions license is required to enable functions for your DevHub org. Contact your Salesforce account representative for steps to acquire the license.

Functions are just another element of your Salesforce project and are deployed easily with simple Salesforce CLI commands. Write JavaScript, Typescript, or Java code that uses Salesforce Functions SDKs to communicate with your org. Then, invoke your Function using Apex, and the Salesforce Functions infrastructure authenticates and runs your Function on demand.

SEE ALSO:

[Salesforce Functions Documentation Center](#)

AppExchange Partners

Analyze Tableau CRM analytics usage data with AppExchange App Analytics. Gain new insights into your subscriber behavior with AppExchange App Analytics package usage summary fields. Switch from Usage Metrics to AppExchange App Analytics to access deeper managed package usage data. Increase the power of your managed package usage data with the AppExchange App Analytics Developer Cookbook. Check the return on your AppExchange Marketing Program (AMP) investment in the updated Marketplace Analytics dashboard.

IN THIS SECTION:[Analyze Tableau CRM Lens and Dashboard Usage with AppExchange App Analytics](#)

AppExchange App Analytics helps you gain insight into how subscribers are using your managed packages. The available usage data now includes Tableau CRM data. Filter your package log file data by `AnalyticsAssetView log_record_type`. Explore by `AnalyticsLens` and `AnalyticsDashboard custom_entity_type` in your package usage summaries and package log files.

[Learn More About Subscriber Orgs with New AppExchange App Analytics Package Summary Fields](#)

Drill deeper into your monthly AppExchange App Analytics package usage summary data with new subscriber `organization_edition`, `organization_name`, and `organization_status` fields.

[Usage Metrics Has Been Retired](#)

Your users can no longer retrieve new Usage Metrics data in their reporting org. Historical Usage Metrics data is available through the Winter '22 release. Enable AppExchange App Analytics in your security-reviewed managed packages to retrieve usage data about how subscribers interact with your AppExchange solutions.

[Deepen Your Analysis with the AppExchange App Analytics Developer Cookbook](#)

Use the cookbook to build Tableau CRM recipes to integrate your License Management App and AppExchange App Analytics data. Then extend your analysis and insights by building App Analytics recipes for use on Tableau CRM dashboards.

[Monitor Your AMP Promotion Performance in the AppExchange Marketplace Analytics Dashboard](#)

The updated Marketplace Analytics dashboard introduces new metrics and visualizations to show you exactly how your AppExchange Marketing Program (AMP) promotions are performing. Quickly gauge performance across all of your promotions in the AMP Insights activity summary. Drill into the performance of individual promotions or compare multiple promotions simultaneously in the AMP Performance Timeline.

Analyze Tableau CRM Lens and Dashboard Usage with AppExchange App Analytics

AppExchange App Analytics helps you gain insight into how subscribers are using your managed packages. The available usage data now includes Tableau CRM data. Filter your package log file data by `AnalyticsAssetView log_record_type`. Explore by `AnalyticsLens` and `AnalyticsDashboard custom_entity_type` in your package usage summaries and package log files.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition. AppExchange App Analytics is available only for managed packages that have passed security review.

Learn More About Subscriber Orgs with New AppExchange App Analytics Package Summary Fields

Drill deeper into your monthly AppExchange App Analytics package usage summary data with new subscriber `organization_edition`, `organization_name`, and `organization_status` fields.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition. AppExchange App Analytics is available only for managed packages that have passed security review.

Why: Previously, AppExchange App Analytics package usage summary data allowed you only to identify subscribers by `organization_id`. With these additional fields, you can learn more about your subscribers' behavior.

Usage Metrics Has Been Retired

Your users can no longer retrieve new Usage Metrics data in their reporting org. Historical Usage Metrics data is available through the Winter '22 release. Enable AppExchange App Analytics in your security-reviewed managed packages to retrieve usage data about how subscribers interact with your AppExchange solutions.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition. 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 [Salesforce Partner Community](#), select **Support**, and then click **New Case**. Select **Other AppExchange Topics | Create a Case**. Then select **Enable App Analytics** from the Subtopic picklist.

SEE ALSO:

[Salesforce Help: Usage Metrics Retirement](#)

Deepen Your Analysis with the AppExchange App Analytics Developer Cookbook

Use the cookbook to build Tableau CRM recipes to integrate your License Management App and AppExchange App Analytics data. Then extend your analysis and insights by building App Analytics recipes for use on Tableau CRM dashboards.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition. AppExchange App Analytics is available only for managed packages that have passed security review.

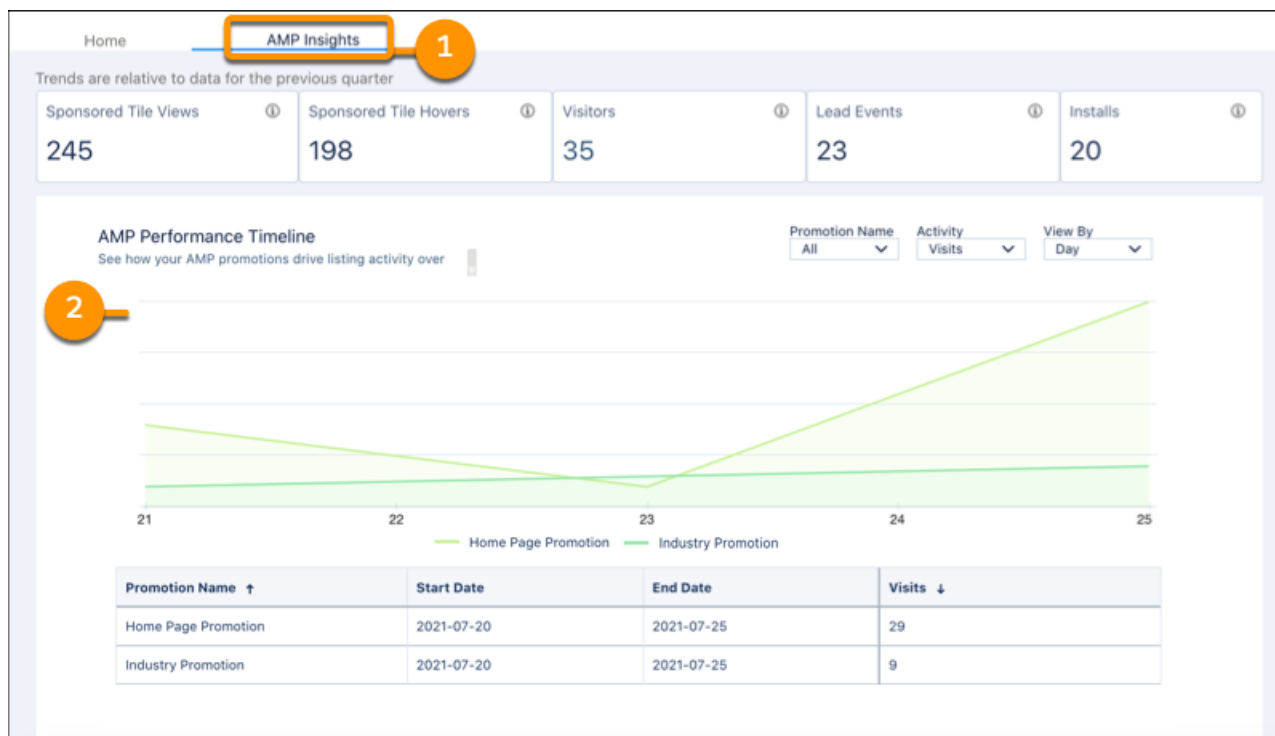
Monitor Your AMP Promotion Performance in the AppExchange Marketplace Analytics Dashboard

The updated Marketplace Analytics dashboard introduces new metrics and visualizations to show you exactly how your AppExchange Marketing Program (AMP) promotions are performing. Quickly gauge performance across all of your promotions in the AMP Insights activity summary. Drill into the performance of individual promotions or compare multiple promotions simultaneously in the AMP Performance Timeline.

Where: The Marketplace Analytics dashboard is available in the Salesforce Partner Community.

Who: Marketplace Analytics is available to eligible Salesforce partners. To view AMP data in Marketplace Analytics, you must participate in the AppExchange Marketing Program. For more details, go to [AMP Overview](#) on AppExchange.

Why: Previously, measuring the success of your AMP promotions was part art, part science. For example, imagine you observed an increase in listing visits while running a home page promotion alongside an industry promotion. In this scenario, you can't be sure which promotion drove the most visits, and you can't determine the number of visits that resulted from organic traffic.



The AMP Insights page (1) in the updated Marketplace Analytics dashboard removes the guesswork. By checking the AMP Performance Timeline (2), you see exactly how many visits resulted from each active promotion.

How: To view the Marketplace Analytics dashboard, log in to the Salesforce Partner Community, click **Publishing** and navigate to the Analytics tab. Then click **AMP Insights**.

Change Data Capture

Install managed packages released from AppExchange without consuming the default entity selection allocation.

IN THIS SECTION:

[Change Data Capture Entity Selections from AppExchange Packages No Longer Count Against Your Allocation](#)

You can install a managed package released from AppExchange containing Change Data Capture entity selections even if you reach the default allocation for the selected entities. AppExchange package installation errors caused by exceeding that allocation no longer occur.

Change Data Capture Entity Selections from AppExchange Packages No Longer Count Against Your Allocation

You can install a managed package released from AppExchange containing Change Data Capture entity selections even if you reach the default allocation for the selected entities. AppExchange package installation errors caused by exceeding that allocation no longer occur.

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

 **Note:**

- This change applies only to managed packages released from AppExchange. It doesn't apply to unmanaged packages or managed packages not released from AppExchange.
- The entity selection allocation is still enforced in the package development org.

Platform Events

Check out the pilot for filtering platform event streams with channels.

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 complex 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 event delivery allocation.

[Maximum Batch Size of Platform Events Is Now 200](#)

The maximum batch size of flows and processes that subscribe to platform events is now 200. Previously, the maximum batch size was 2,000.

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 complex 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 event delivery allocation.

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

Why: The pilot was offered last release. In this release, we made these enhancements for the filter expression.

- Text field values must be enclosed within single quotes. Previously, you couldn't use single quotes for Text field values. This change breaks any filters that you've set up in API v52.0. Make sure that you add single quotes to your Text field values to previously defined filters.
- Text field values are case-sensitive. Previously, they were case-insensitive.
- Support for a complex filter with up to five field-value pairs joined by the `AND` operator.
- Support for these comparison operators (= continues to be supported):
 - `!=`
 - `>`
 - `<`
 - `>=`
 - `<=`
- Support for these additional field types (Text, Text Area (Long), and Number continue to be supported):
 - Checkbox

- Date
- Date/Time

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. To create a channel, use `PlatformEventChannel`. To add a filter expression for a custom platform event, use `PlatformEventChannelMember`.

Example filter expressions in the `PlatformEventChannelMember.FilterExpression` field:

```
City__c='San Francisco' AND Amount__c>10.50 AND Has_Shipped__c=true  
AND Delivery_Date__c > 2021-07-14T09:30:11-08:00
```

 **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 it's not supported for standard platform events or change data capture events.
- This pilot feature is supported for CometD subscribers, but it's not supported for other types of subscribers, such as Apex triggers, flows, and processes.

Maximum Batch Size of Platform Events Is Now 200

The maximum batch size of flows and processes that subscribe to platform events is now 200. Previously, the maximum batch size was 2,000.

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

SEE ALSO:

[Platform Events Maximum Batch Size Is 200](#)

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 on Lightning Experience functionality, including promotions, primary carts, and order summary adjustments. Check out Experience Cloud Microsites (pilot) and externally managed accounts and Salesforce Scheduler updates.

[API: New and Changed Items](#)

Access more data objects and metadata types in API version 53.0.

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.

Changed Lightning Web Components

The following components have changed.

lightning-accordion-section

On desktop screens, the section title now truncates and displays with an ellipsis when it's too long to display in the viewport. To see the full text, hover over the section title with the mouse. On mobile devices, long section titles wrap to multiple lines because hover text isn't available.

lightning-button

This attribute is new.

- `aria-labelledby`—Specifies the ID or list of IDs of the element or elements that contain visible descriptive text to describe the button.

lightning-helptext

This attribute has changed.

- `icon-variant`—The `inverse` variant is now supported. Use this variant to add a white fill for dark backgrounds.

lightning-input-field

This field type is now supported.

- `Time`—An input field that displays time selection in 15-minute increments. The time format is automatically validated against the user's Salesforce locale. On mobile devices, time fields use native mobile time pickers.

This attribute has changed.

- `field-name`—The `Name` compound field is now supported for the `User` object. Previously, you had to include both the `FirstName` and `LastName` fields.

lightning-output-field

This field type is now supported.

- `Time`—Displays the formatted time based on the user's locale.

lightning-tree-grid

This attribute is new for the component.

- `aria-label`—Labels the component for assistive technology. The attribute and its value are passed down to the rendered `<table>` element.

This attribute is new for the `columns` property.

- `wrapText`—Specifies whether text in a column is wrapped instead of clipped when the table renders. Wrapped text vertically expands a row to reveal its full content. You can't set the number of wrapped lines to display as you can with `lightning-datatable`.

SEE ALSO:

[Component Library](#)

New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

New Module

The following module is now available.

lightning/userConsentCookie

This module includes two exported functions, `isCategoryAllowedForCurrentConsent` and `setCookieConsent`. Use these exported functions to incorporate user-authorized cookie consent into your components for an Experience Cloud site.

- `isCategoryAllowedForCurrentConsent`—Check consent for a single cookie category.
- `setCookieConsent`—Grant or deny consent for one or more cookie categories.

```
import { LightningElement, track } from 'lwc';
import { ShowToastEvent } from 'lightning/platformShowToastEvent';
import { isCategoryAllowedForCurrentConsent, setCookieConsent }
  from 'lightning/userConsentCookie'
```

For more information, see [Add User-Authorized Cookie Consent to Your Lightning Web Components](#) on page 210.

Changed Modules

The following modules have a new wire adapter or JavaScript function.

lightning/analyticsWaveApi (Beta)

This module includes new wire adapters and methods for implementing Tableau CRM connectors and connected objects functionality.

The new wire adapters are:

- `getDataConnector`—Returns a Tableau CRM connector by ID.
- `getDataConnectors`—Returns a collection of Tableau CRM connectors.
- `getDataConnectorSourceFields`—Returns a collection of Tableau CRM connector source fields by connector ID and source object name.
- `getDataConnectorSourceObject`—Returns a Tableau CRM connector source object by connector ID and source object name.
- `getDataConnectorSourceObjects`—Returns a collection of Tableau CRM connector source objects by connector ID.

- `getDataConnectorStatus`— Returns the status for a Tableau CRM connector by connector ID.
- `getDataConnectorTypes`— Returns a collection of Tableau CRM connector types.
- `getReplicatedFields`— Returns a collection of fields for the specified Tableau CRM connected object.

The new methods are:

- `createDataConnector`— Creates a Tableau CRM connector instance.
- `createReplicatedDataset`— Creates a Tableau CRM replicated dataset, also known as a connected object.
- `deleteReplicatedDataset`— Deletes an existing Tableau CRM replicated dataset, also known as a connected object, by ID.
- `ingestDataConnector`— Triggers the Tableau CRM connector to run a data sync by connector ID.
- `updateDataConnector`— Updates an existing Tableau CRM connector instance by ID.
- `updateReplicatedDataset`— Updates an existing Tableau CRM connected object by ID.
- `updateReplicatedFields`— Updates the fields for a Tableau CRM connected object by ID.

Use these wire adapters and methods to retrieve, create, and update Tableau CRM connector and connected objects and to run connector data syncs.

```
import { LightningElement, api, wire } from "lwc";
import { getReplicatedDataset } from 'lightning/analyticsWaveApi';

export default class GetReplicatedDataset extends LightningElement {
  @api rdId; // or fetch the ID

  @wire(getReplicatedDataset, {id: '$rdId'})

  onGetReplicatedDataset({data, error}) {
    if (error) { console.log(getReplicatedDataset({rdId}) ERROR:', error); }
    else if (data) {
      // Display or process the query results
      console.log(' (getReplicatedDataset({rdId}) RESPONSE:', data);
    }
  }
}
```

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

The following components have changed.

lightning:accordionSection

On desktop screens, the section title now truncates and displays with an ellipsis when it's too long to display in the viewport. To see the full text, hover over the section title with the mouse. On mobile devices, long section titles wrap to multiple lines because hover text isn't available.

lightning:helptext

This attribute has changed.

- `iconVariant`—The `inverse` variant is now supported. Use this variant to add a white fill for dark backgrounds.

lightning:inputField

This field type is now supported.

- **Time**—An input field that displays time selection in 15-minute increments. The time format is automatically validated against the user's Salesforce locale. On mobile devices, time fields use native mobile time pickers.

This attribute has changed.

- **fieldName**—The `Name` compound field is now supported for the `User` object. Previously, you had to include both the `FirstName` and `LastName` fields.

lightning:outputField

This field type is now supported.

- **Time**—Displays the formatted time based on the user's locale.

lightning:treeGrid

This attribute is new for the component.

- **ariaLabel**—Labels the component for assistive technology. The attribute and its value are passed down as `aria-label` in the rendered `<table>` element.

This attribute is new for the `columns` property.

- **wrapText**—Specifies whether text in a column is wrapped instead of clipped when the table renders. Wrapped text vertically expands a row to reveal its full content. You can't set the number of wrapped lines to display as you can with `lightning:datatable`.

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:

[Cache Namespace](#)

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[Functions Namespace](#)

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[LxScheduler Namespace](#)

The LxScheduler namespace has these new methods.

[System Namespace](#)

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[Invocable Namespace \(Developer Preview\)](#)

The new Invocable namespace is used for calling invocable actions. It has these classes and methods.

SEE ALSO:

[Apex: New Features](#)

Cache Namespace

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

VERSIONED BEHAVIOR CHANGE: From version 53.0 onwards, when you pass a non-alphanumeric key to all methods with a key parameter, in the `Session` and `Org` classes, it throws a `Cache.InvalidParamException` exception.

In version 52.0 and earlier, while non-alphanumeric keys in all methods except the `get (cacheBuilder, key)` method throw a `Cache.Org.OrgCacheException` exception, non-alphanumeric keys in the `get (cacheBuilder, key)` method throws no exception.

New Exceptions

Throw an exception when execution of the cache builder fails

Use the new `Cache.CacheBuilderExecutionException` exception.

Changed Exceptions

Throw an exception when an incorrectly formatted key is passed to the `Cache.Session` or `Cache.Org` methods

Use the changed `Cache.InvalidParamException` exception, which includes extended checks for incorrect format of the key parameter.

Functions Namespace

The Functions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Use the `MockFunctionInvocationFactory` class in mock testing of Salesforce Functions

Use the `createSuccessResponse (invocationId, message)` and `createErrorResponse (invocationId, functionsErrorType, errorMsg)` methods to generate messages for mock testing of Salesforce Functions.

New Interfaces

Implement the `FunctionInvokeMock` interface to mock Salesforce Functions responses during testing

Specify an appropriate mock response in the `FunctionInvokeMock.respond (functionName, payload)` method.

LxScheduler Namespace

The LxScheduler namespace has these new methods.

New Methods in Existing Classes

Track requests from external systems using correlation ID

Use the new `setCorrelationId (correlationId)` method in the `lxscheduler.GetAppointmentCandidatesInputBuilder` and `lxscheduler.GetAppointmentSlotsInputBuilder` classes.

Limit the number of service resources to show during appointment scheduling when appointment distribution is enabled

Use the new `setResourceLimitApptDistribution(resourceLimitApptDistribution)` method in the `lxscheduler.GetAppointmentCandidatesInputBuilder` class.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Get information about the context user's package access

Use the new `hasPackageLicense(packageId)` method to verify if the context user has package access through the assignment of a managed package license.

Invocable Namespace (Developer Preview)

The new Invocable namespace is used for calling invocable actions. It has these classes and methods.



Note: Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

New Classes

Call invocable actions from Apex code

The new `Invocable.Action` class has these methods:

Create an empty invocation in preparation for making an action call

Use the `Invocable.Action.addInvocation()` method to create an empty invocation to which parameters can be added.

Clear the existing invocations from the action

Use the `Invocable.Action.clearInvocation()` method.

Create a wrapper for a custom invocable action

Use the `Invocable.Action.createCustomAction(type, name)` method.

Create a wrapper for a custom invocable action in a specified namespace

Use the `Invocable.Action.createCustomAction(type, namespace, name)` method.

Create a wrapper for a standard invocable action

Use the `Invocable.Action.createStandardAction(type)` method to create a wrapper for a Salesforce standard invocable action.

Get the name of an invocable action

The `Invocable.Action.getName()` method returns a string with the name of an invocable action.

Get the namespace of an invocable action

The `Invocable.Action.getNamespace()` method returns a string with the namespace of an invocable action. This method applies to custom invocable actions only.

Get the type of an invocable action

The `Invocable.Action.getType()` method returns a string with the invocable action type.

Invoke an invocable action from Apex code

The `Invocable.Action.invoke()` method returns an `Invocable.Action.Result` object.

Determine whether an invocable action is standard

The `Invocable.Action.isStandard()` method returns true if the invocable action is a Salesforce standard invocable action.

Set a value for an invocable action parameter

The `Invocable.Action.setInvocationParameter(parameterName, parameterValue)` method sets a named parameter to the specified value.

Initialize the invocation for an action

The `Invocable.Action.setInvocations(List<Map<String, Object>> invocations)` method initializes the invocations for an action from a preexisting list of invocations.

Return the invocable action

The `Invocable.Action.Result.getAction()` method returns the action that was invoked and caused a result to be returned.

Provides error information from invocable actions called from Apex code

The new `Invocable.Action.Error` class has these methods:

Get the error code returned by an invocable action

The `Invocable.Action.Error.getCode()` method returns a string containing an error code returned by an invocable action.

Get the error message returned by an invocable action

The `Invocable.Action.Error.getMessage()` method returns a string containing the error message returned by an invocable action.

Provides results from invocable actions called from Apex code

The new `Invocable.Action.Result` class has these methods:

Get a list of the parameter values set for an invocable action

The `Invocable.Action.Result.getInvocationParameters()` method returns a list that contains the input parameter values for each invocation of an action. Each map in the list contains a key for the name of each input parameter.

Get a list of the parameter values returned by an invocable action

The `Invocable.Action.Result.getOutputParameters()` method returns a list that contains the result for each invocation of an action. Each map in the list contains a key for the name of each output parameter.

Determine if an invocable action ran without errors

The `Invocable.Action.Result.isSuccess()` method returns true when the invocable action ran successfully.

Get errors that were returned by an invocable action

The `Invocable.Action.Result.getErrors()` method returns a list of `Invocable.Action.Error` objects.

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 on Lightning Experience functionality, including promotions, primary carts, and order summary adjustments. Check out Experience Cloud Microsites (pilot) and externally managed accounts and Salesforce Scheduler updates.

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:[Simplified Connect in Apex Release Notes](#)

We streamlined the Connect in Apex release notes to get you started faster with new and changed classes. The New and Changed Connect in Apex Classes section now includes relevant new input and output class information. Properties and property descriptions for new input and output classes and values for new enums are no longer included in the release notes. Changed input and output classes and changed enums continue to be documented in the release notes.

[New and Changed Connect in Apex Classes](#)

These classes are new or have changes.

[Changed Connect in Apex Input Classes](#)

These input classes have changes.

[Changed Connect in Apex Output Classes](#)

These output classes have changes.

[Changed Connect in Apex Enums](#)

These enums have changes.

SEE ALSO:

[Connect REST API](#)

[Apex Reference Guide: ConnectApi Namespace](#)

[Connect REST API Developer Guide](#)

Simplified Connect in Apex Release Notes

We streamlined the Connect in Apex release notes to get you started faster with new and changed classes. The New and Changed Connect in Apex Classes section now includes relevant new input and output class information. Properties and property descriptions for new input and output classes and values for new enums are no longer included in the release notes. Changed input and output classes and changed enums continue to be documented in the release notes.

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

New and Changed Connect in Apex Classes

These classes are new or have changes.

B2B Commerce on Lightning Experience

These new methods are in the `ConnectApi.CommerceBuyerExperience` class.

Get adjustments for an order summary

- `getOrderSummaryAdjustments(webstoreId, orderSummaryId)`
- `getOrderSummaryAdjustments(webstoreId, orderSummaryId, effectiveAccountId)`

New output class: `ConnectApi.OrderSummaryAdjustmentCollection`

Get adjustments for order items

- `getOrderItemSummaryAdjustments(webstoreId, orderSummaryId, orderItemSummaryAdjustmentCollectionInput)`
- `getOrderItemSummaryAdjustments(webstoreId, orderSummaryId, orderItemSummaryAdjustmentCollectionInput, effectiveAccountId)`

New input class: `ConnectApi.OrderItemSummaryAdjustmentCollectionInput`

New output class: `ConnectApi.OrderItemSummaryAdjustmentCollection`

This new method is in the `ConnectApi.CommerceCart` class.

Make a secondary cart a primary cart

- `makeCartPrimary(webstoreId, activeCartOrId, effectiveAccountId)`

New output class: `ConnectApi.CommerceActionResult`

Experience Cloud Microsites (Pilot)

These new methods are in the new `ConnectApi.MarketingIntegration` class.



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.

Get a marketing integration form for an Experience Cloud site

- `getForm(siteId, formId)`

New output class: `ConnectApi.Form`

Save a marketing integration form for an Experience Cloud site

- `saveForm(siteId, formInput)`

New input class: `ConnectApi.FormInput`

New output class: `ConnectApi.Form`

Submit a marketing integration form for an Experience Cloud site

- `submitForm(siteId, formId, formSubmissionInput)`

New input class: `ConnectApi.FormSubmissionInput`

New output class: `ConnectApi.FormSubmission`

Externally Managed Accounts

These new methods are in the `ConnectApi.ExternalManagedAccount` class.

Get externally managed accounts available to the context user, including the context user's account, across all Experience Cloud sites

- `getCommunitiesExternalManagedAccounts(communityId, includeMyAccount)`

Get externally managed accounts, including the context user's account, for a store

- `getExternalManagedAccounts(webstoreId, includeMyAccount)`

Field Service

This new method is in the `ConnectApi.FieldService` class.

Filter records on recordset filter criteria

- `evaluateRecordsetFilterCriteria(recordsetFilterCriteriaInput)`

New input class: `ConnectApi.RecordsetFilterCriteriaInput`

New output classes: `ConnectApi.RecordsetFilterCriteriaOutput`

Flow Orchestrator (Beta)

This new method is in the new `ConnectApi.Orchestration` class.



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](#).

Retrieve orchestration instances with work items related to a record

- `getOrchestrationInstanceCollection(relatedRecordId)`

New output class: `ConnectApi.OrchestrationInstanceCollection`

Salesforce Customer Data Platform (CDP)

This new method is in the `ConnectApi.CdpQuery` class.

Synchronously query Salesforce CDP data with new parameters

- `queryANSISql(input, batchSize, offset, orderby)`

Salesforce Scheduler

These new methods are in the new `ConnectApi.LightningScheduler` class.

Create a service appointment

- `createServiceAppointment(createServiceAppointmentInput)`

New input class: `ConnectApi.CreateServiceAppointmentInput`

New output class: `ConnectApi.ServiceAppointmentOutput`

Update an existing service appointment

- `updateServiceAppointment(updateServiceAppointmentInput)`

New input class: `ConnectApi.UpdateServiceAppointmentInput`

New output class: `ConnectApi.ServiceAppointmentOutput`

Changed Connect in Apex Input Classes

These input classes have changes.

B2B Commerce on Lightning Experience

`ConnectApi.CartInput`

This input class has this new property.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).

Field Service

`ConnectApi.ShiftsFromPatternInput`

This input class has these new and changed properties.

- `serviceResourceId`—This property is no longer available. In version 53.0 and later, use `serviceResourceIdList`.

- `serviceResourceIdList`—List of service resource IDs to assign shifts to.

Personalization

ConnectApi.AudienceCriterionValueInput

This input class has this new property.

- `audienceId`—ID of an audience.

Salesforce Order Management

ConnectApi.OrderSummaryInputRepresentation

This input class has this new optional property.

- `businessModel`—Specifies whether the order is B2C or B2B. Valid values are:
 - B2B
 - B2C

Changed Connect in Apex Output Classes

These output classes have changes.

B2B Commerce on Lightning Experience

ConnectApi.CartItem

This output class has this changed property.

- `itemizedAdjustmentAmount`—Total itemized adjustment amount for the item, including promotions and excluding taxes.

ConnectApi.CartSummary

This output class has these new and changed properties.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).
- `totalProductAmountAfterAdjustments`—This amount now includes promotions.
- `totalPromotionalAdjustmentAmount`—Total promotional adjustment amount for items in the cart.

Externally Managed Accounts

ConnectApi.ExternalManagedAccountOutput

This output class has these new properties.

- `accountName`—Name of the external managed account record.
- `address`—Default shipping address of the external managed account.
- `isMyAccount`—Specifies whether the account is the context user's account (`true`) or not (`false`).

Field Service

ConnectApi.ShiftsFromPattern

This output class has these new properties.

- `error`—Error details for shifts from a pattern.
- `isSuccess`—Indicates if the request is successful (`true`) or not (`false`).

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see [ConnectApi Enums](#) in the *Apex Reference Guide*.

ConnectApi.AudienceCriteriaType

This enum has this new value.

- **Audience**—Criterion based on audience.

API: New and Changed Items

Access more data objects and metadata types in API version 53.0.

IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[New and Changed Standard Platform Events](#)

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

[REST API](#)

REST API includes changed calls.

[SOAP API](#)

SOAP API includes new, changed, and deprecated calls.

[Reports and Dashboards REST API](#)

Create dashboards that respond dynamically to changes in business conditions and goals. For a dynamic gauge chart, specify a field from a Salesforce object record to use as the chart measure or chart target.

[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 on Lightning Experience functionality, including promotions, primary carts, and order summary adjustments. Check out Experience Cloud Microsites (pilot) and externally managed accounts updates.

[Tableau CRM REST API](#)

Capture Tableau CRM dashboard and lens images using the Tableau CRM REST API. Retrieve dataflow jobs by `jobType`, `startedAfter`, or `startedBefore`.

[User Interface API](#)

Get the save options for a record layout.

[Bulk API](#)

These items are new, changed, or deprecated in API version 53.0.

[Bulk API 2.0](#)

These items are new, changed, or deprecated in API version 53.0.

[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

See if a permission set license is enabled for integrations

Use the new `IsAvailableForIntegrations` field on the existing `PermissionSetLicense` object.

Choose how in-app guidance appears

To identify when and where prompts appear, we added the `TargetPageKey4` field on the `PromptVersion` object.

Assign in-app guidance to record types

To determine if in-app guidance is specific to a record type, use the new `TargetRecordType` field on the `PromptVersion` object.

Point to specific elements on a page with targeted prompts (Generally Available)

To use the new `Targeted` prompt type value, which is now generally available, use the `DisplayType` field on the `PromptVersion` object.

Update permissions to use `DeveloperName` field on affected objects

To view, group, sort, or filter the `DeveloperName` field on affected objects, you must have View Setup and Configuration OR View `DeveloperName` permission. See [here](#) for more information.

Commerce

View the price adjustment for a cart item

Use the new `CartItemPriceAdjustment` object.

View a price adjustment group for a cart

Use the new `WebCartAdjustmentGroup` object.

View whether a price adjustment applies to the cart or a cart item

Use the new `AdjustmentTargetType` field on the `CartTax` object.

View the ID of a price adjustment for a cart item being taxed.

Use the new `CartItemPriceAdjustmentId` field on the `CartTax` object.

Specify that your store uses the default Apex service for promotions integration

Use the new value `Promotions` in the existing `ServiceProviderType` field on the `StoreIntegratedService` object.

Specify that your store uses an external Apex service for promotions integration

Use the new value `Promotions` in the existing `ExternalServiceProviderType` field on the `RegisteredExternalService` object.

View tax-related information for a cart and determine if the cart is primary or secondary

Use the new `IsSecondary`, `TaxLocaleType`, `TotalPromoAdjustmentTaxAmount`, and `TotalPromoAdjustmentAmount` fields on the `WebCart` object.

View information about price adjustments for a cart item

Use the new `DistributedAdjustmentAmount`, `DistributedAdjustmentTaxAmount`, `ListPrice`, `TotalPriceAfterAllAdjustments`, `TotalPromoAdjustmentAmount`, and `TotalPromoAdjustmentTaxAmount` fields on the `CartItem` object.

Customization

Create custom profiles

Use the `create()` call on the Profile object. You can specify the `Description`, `Name`, `Permissions` `PermissionName`, and `UserLicenseId` fields during create.

REMOVED: The SecureAgent object has been removed

The object is removed in API version 53.0 and later.

Development

Link AsyncApexJob records to the applicable CronTrigger.

Use the new `CronTriggerId` field on the existing AsyncApexJob object.

Einstein Automate

Create a Decision Matrix, which matches input values to a table row and returns the row's output values

Use the new `CalculationMatrix`, `CalculationMatrixColumn`, `CalculationMatrixRow`, and `CalculationMatrixVersion` objects.

Create an Expression Set, a series of calculations performed using matrix lookups, variables, and constants

Use the new `CalcProcStepRelationship`, `CalcProcStepRelationshipFeed`, `CalcProcStepRelationshipHistory`, `CalculationProcedure`, `CalculationProcedureStep`, `CalculationProcedureVariable`, and `CalculationProcedureVersion` objects.

View all triggering objects and platform events for triggered flows

Use the new `TriggerObjectOrEventLabel` and `TriggerObjectOrEventLabelId` fields on the `FlowDefinitionView` object. For more information, see [View All Triggering Objects and Platform Events for Triggered Flows](#).

View details about a run-time instance of an orchestration (Beta)

Use the new `FlowOrchestrationInstance` object.

View details about a run-time stage in an orchestration instance (Beta)

Use the new `FlowOrchestrationStageInstance` object.

View details about a run-time step in an orchestration stage instance (Beta)

Use the new `FlowOrchestrationStepInstance` object.

Event Monitoring

Analyze your flows' usage trends and troubleshoot performance issues in Event Monitoring

Use the new supported value `FlowExecution` in the existing `EventType` field on the `EventLogFile` object. For more information, see [Analyze Your Flows in the Flow Execution Event Type](#).

Get the names of installed managed packages that access named credentials

Use the new `Named Credential` event type of the `EventLogFile` object.

Experience Cloud

Customize device activation emails for Experience Cloud sites

Use the new `DeviceActEmailTemplateId` field on the existing `Network` object.

Create scorecards and track partner performance

Use the `Scorecard` and `ScorecardMetric` objects. Introduced in API version 40.0, these objects have been added to the Object Reference Guide.

Associate your scorecards with accounts, channel programs, or channel program levels

Use the `ScorecardAssociation` object. Introduced in API version 41.0, this object has been added to the Object Reference Guide.

Field Service

Save dispatchers time by using a pattern of templates for creating shifts

Use the new `ShiftPattern` and `ShiftPatternEntry` objects.

Assess the business impact of an asset failure

Use the `ConsequenceOfFailure` field on the existing `Asset` object. Introduced in API version 53.0, this field has been added to the Field Service Developer Guide and to the Object Reference Guide.

Functions

Check the status of your org's connection to Salesforce Functions

Use the `FunctionConnection` object to inspect how your org is connected to Salesforce Functions. This object was previously named `SfFunctionsConnection`.

Lightning Components

View information about CORS violation records for Lightning apps in your event log files

The `CORS Violation Record` event type in the `EventLogFile` object captures information about Cross-Origin Resource Sharing (CORS) violations. Cross-origin requests to Lightning apps are blocked unless the request comes from a URL listed in your CORS allowlist.

Quip

DEPRECATED: `CollabUserEngmtRecordLink` object

The `CollabUserEngmtRecordLink` object is now deprecated. You can still access user engagement metrics for metric dates before August 12, 2021. To obtain user engagement metrics for dates starting from August 12, 2021, follow the instructions in the [Quip Engagement Metrics documentation](#).

Order Management

Define the business type of a sales channel, such as B2C or B2B

Use the new `Type` and `Type Category` fields on the `SalesChannel` object. In existing Order Management orgs, the version 234 automated update process sets both fields to B2C for each sales channel that's associated with at least one managed order summary.

Categorize an order summary as B2C or B2B

Use the new `BusinessModel` field on the `OrderSummary` object.

Identify fulfillment orders for reshipments

Use the new `IsReship` field on the `FulfillmentOrder` object.

Identify fulfillment order line items and reasons for reshipments

Use the new `IsReship` and `ReshipReason` fields on the `FulfillmentOrderLineItem` object.

Track reshippable and reshipped order item quantities

Use the new `QuantityAvailableToReship` and `QuantityReshipped` fields on the `OrderItemSummary` object.

Associate return shipments with return orders

Use the new `ReturnOrder` field on the `Shipment` object.

Associate return shipment items with return order line items

Use the new `ReturnOrderLineItem` field on the `ShipmentItem` object.

Sales

Include more in the Subject field of a Lightning email template

The `Subject` field in the `EmailTemplate` object now holds 1,000 characters. For Classic email templates, the limit remains 230 characters.

Get more accurate data for closed tasks and events

The `CompletedDateTime` field is now in the `ActivityHistory`, `LookedUpFromActivity`, `OpenActivity`, and `Task` objects.

Track the date when a forecast type was activated in Collaborative Forecasts

Use the `LastActivatedDate` field on the `ForecastingType` object.

Add another forecast category to better support your business processes

Use the new `MostLikely` picklist value in the `ForecastCategory` and `ForecastCategoryName` fields on the `Opportunity`, `OpportunityStage`, and `OpportunityHistory` objects.

Learn how many times an opportunity's close date has been pushed out

Use the new `PushCount` field on the `Opportunity` object.

Create custom pipeline views and saved filters in Pipeline Inspection

Use the new `PipelineInspectionListView` object.

Flag important opportunities to track their progress in Pipeline Inspection

Use the new `UserPrioritizedRecord` object. See which opportunities have been marked as important by using the `IsPriorityRecord` field on the `Opportunity` object.

Learn when sales teams haven't updated opportunity next steps

Use the new `NextStep` value in the `FieldName` field on the `RecentFieldChange` object.

Learn when the last edit was made to a sales cadence

Use the new `LastEditedDateTime` field on the `ActionCadence` object.

Learn the status of a sales cadence step

Use the new `GraphState` field on the `ActionCadenceStep` object.

Learn whether a sales cadence step has more than one email template or call script assigned for variant testing

Use the new `HasVariant` field on the `ActionCadenceStep` object.

Learn which step follows a specific sales cadence step

Use the new `GoToStepName` field on the `ActionCadenceStep` object.

Learn the status of a sales cadence branch step

Use the new `GraphState` field on the `ActionCadenceRule` object.

Learn whether an error has occurred on a sales cadence step

Use the new `ErrorCode` field on the `ActionCadenceStepTracker` object.

Learn the details of email templates and call scripts used on sales cadence steps for variant testing

Use the new `ActionCadenceStepVariant` object.

Learn whether a target exited a sales cadence because its current step was deleted

Use the new `AutomaticallyExitedDeletedStep` value in the `CompletionReason` field on the `ActionCadenceTracker` object.

Learn whether a target exited a sales cadence because its parent step was deleted

Use the new `AutomaticallyExitedInvalidParentStep` value in the `CompletionReason` field on the `ActionCadenceTracker` object.

Learn how many times a target has looped through a series of linked sales cadences

Use the new `DaisyChainIteration` field on the `ActionCadenceTracker` object.

Salesforce Scheduler

Specify the frequency at which the utilization of service resources is calculated

Use the new `PolicyApplicableDuration` field on the `AppointmentAssignmentPolicy` object.

Specify the count type for resource utilization

Use the new `UtilizationFactor` field on the `AppointmentAssignmentPolicy` object.

Record service resource utilization by date for the Load Balancing appointment assignment policy

Use the new `AppointmentScheduleAggr` object.

Store service appointments for each service resource

Use the new `AppointmentScheduleLog` object.

Set the rules for scheduling appointments

Use the new `AppointmentSchedulingPolicy` object.

Look up a work type or a work type group for a time slot

Use the new `AppointmentTopicTimeSlot` object.

Security, Identity, and Privacy

BEHAVIOR CHANGE: The `urlPatterns` field on the `CorsWhitelistEntry` object now supports Mozilla® Firefox® and Google Chrome™ extensions as valid entries

You can now include Firefox and Chrome browser extensions in your cross-origin resource (CORS) allowlist.

Monitor which users register built-in authenticators (beta)

Use the new `HasBuiltInAuthenticator` field on the existing `TwoFactorMethodsInfo` object.

Track when users verify their identity with a built-in authenticator (beta)

Use the new `BuiltInAuthenticator` value in the existing `VerificationMethod` field on the `VerificationHistory` object.

See when a user is prompted for identity verification when registering a built-in authenticator (beta)

Use the new `ConnectWebAuth` value in the existing `Activity` field on the `VerificationHistory` object.

Monitor when users are logged out due to forced authentication

Use the new `ForceAuthNLogout` value in the `ErrorCode` field on the `IdpEventLog` object.

Get information on Security Health Check scores for connected tenants in Security Center

Use the new `TenantSecurityHealthCheckTrend`, `TenantSecurityHealthCheckDetail`, and `TenantSecurityMonitorMetric` objects.

Store details for connected apps that are added to Security Center

Use the new `TenantSecurityConnectedApp` object.

Get information on detected threats to your Security Center tenants

Use the new `TenantSecurityApiAnomaly`, `TenantSecurityCredentialStuffing`, `TenantSecurityReportAnomaly`, and `TenantSecuritySessionHijacking` objects.

Monitor how and when Security Center users log in to your org

Use the new `TenantSecurityLogin` and `TenantSecurityUserActivity` objects.

Track managed and unmanaged packages that are added to Security Center tenants

Use the new `TenantSecurityPackage` object.

See details of user permissions assigned in Security Center

Use the new `TenantSecurityUserPerm` object.

Define security setting Alerts in Security Center

Use the new `TenantSecurityNotification Rule` object.

Assign different roles to individuals within an org

Use the new Customer and Seller objects.

Define unique brands as children of a parent org

Use the new BusinessBrand object.

Service**Define the mapping between a job profile and a queue in the Omni-based workflow for Workforce Engagement**

Use the new JobProfileQueueGroup object.

Indicate whether records are associated with the Omni-based workflow for Workforce Engagement

Use the new `IsOmni` field on the Workload, WorkloadUnit, WorkforceCapacity, and WorkforceCapacityUnit objects.

Learn about required resources for shifts created with templates in Workforce Engagement

Use the new `IsShiftTemplateNonStandard`, `ShiftTemplateDuration`, `ShiftTemplateDurationType`, `ShiftTemplateId`, `ShiftTemplateJobProfile`, `ShiftTemplateName`, and `ShiftTemplateStartTime` fields on the WorkforceCapacityUnit object.

Specify a group identifier for a work demographic record in the Omni-based workflow for Workforce Engagement

Use the new `GroupIdentifier` field on the WorkDemographic object.

Inspect pending service routing interaction information that is used when work is routed to an agent

Use the new PendingServiceRoutingInteractionInfo object.

Use the Service Setup Assistant to get sample surveys and email templates

Use the new `OOTBSurveyQuestionEmailTemplates`, `OOTBSurveyRecords`, and `SurveyEnable` values on the `TaskName` field on the existing ServiceSetupProvisioning object.

Track the record action history associated with scorecards

Use the new `Scorecard` value in the `ParentRecordId` field on the existing RecordActionHistory object. We also removed 18 values from the `ParentRecordId` field related to records that don't use RecordActionHistory.

Track the state change of the record action history with an additional state value

Use the new `Resumed` value in the `State` field on the existing RecordActionHistory object.

Track incidents and problems associated with business interruptions

Use the new Problem and Incident objects.

Manage change requests associated with problems and incidents

Use the new ChangeRequest, ChangeRequestRelatedIssue, CaseRelatedIssue objects.

Map an external system's call center with a Salesforce user or queue

Use the new CallCenterRoutingMap object.

Track when a customer's connection to a chat session times out

Use the new `ConnectionTimeout` and `ConnectionWarning` picklist values on the existing `Type` field of the LiveChatTranscriptEvent object.

IN THIS SECTION:[Retired Objects](#)

These objects are retired.

Retired Objects

These objects are retired.

Usage Metrics is retired

Usage Metrics and the `MetricsDataFile` API object are no longer available. Switch now to [AppExchange App Analytics](#), which provides richer usage data about how subscribers interact with your AppExchange solutions.

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.

Commerce**Be notified of quantity changes for FulfillmentOrderLineItem records**

Subscribe to `FulfillmentOrderQtyChgEvent` to receive notifications when the `Quantity` field changes on a `FulfillmentOrderLineItem` record.

Einstein Automate**Track when a running orchestration is ready to be resumed (beta)**

Subscribe to `FlowOrchestrationEvent` to receive notifications when a running instance of an orchestration is ready to be resumed.

Salesforce CDP**Be notified of an action that occurs within Salesforce CDP**

Subscribe to `DataObjectDataChgEvent`.

Be notified of metadata changes for Data Lake, Data Model, and Calculated Insight objects

Subscribe to `DataObjectMetadataChgEvent`.

REST API

REST API includes changed calls.

Changed Calls

These calls are changed in API version 53.0.

Changed Calls**BEHAVIOR CHANGE: DateTime values must use specific formats**

Use one of these two `DateTime` formats.

- `yyyy-MM-ddTHH:mm:ss.SSSZ`
- `yyyy-MM-ddTHH:mm:ss.SSS+/-HH:mm`

In API version 53.0 and later, requests that use a non-supported `DateTime` format (such as `123456000`) result in an error. In earlier versions, such requests *sometimes* work, but don't rely on that happening.

DateTime values that use more than 3 digits after the decimal place are handled correctly

In API version 53.0 and later, the API correctly handles `DateTime` values in JSON requests that use more than 3 digits after the decimal point. In earlier versions, such values are interpreted incorrectly.

For example, consider this request, which uses more than 3 digits after the decimal point.

```
POST /subjects/Contact
{
  "LastName": "Smith",
  "EmailBouncedDate": "2020-07-29T19:10:18.182314Z"
}
```

In API version 52.0 and earlier, the Contact is created successfully, but the EmailBouncedDate is set to 2020-07-29T19:**13:20**.000+0000, which is incorrect. The correct value is 2020-07-29T19:**10:18**.000+0000.

In API version 53.0 and later, the EmailBouncedDate is set correctly.

BEHAVIOR CHANGE: Limit the number of service resources to show during appointment scheduling when appointment distribution is enabled

The `getAppointmentCandidates` resource has a new `resourceLimitApptDistribution` parameter.

BEHAVIOR CHANGE: Track requests coming from external systems using correlation ID

The `getAppointmentSlots` and `getAppointmentCandidates` resources have a new `correlationId` parameter.

Responses to `subjectsCollections` now include the entity IDs related to any unsuccessful delete operation

When a request using the composite resource `subjectsCollections` includes an unsuccessful delete call, the response now contains the IDs of any failed entities. This change applies to API versions 53.0 and later.

SOAP API

SOAP API includes new, changed, and deprecated calls.

New, Changed, and Deprecated Calls

Changed Calls

Responses now include the entity IDs related to any unsuccessful `delete()` call

When a request includes an unsuccessful delete operation, the response now contains the IDs of any failed entities. This change applies to versions 53.0 and later.

Reports and Dashboards REST API

Create dashboards that respond dynamically to changes in business conditions and goals. For a dynamic gauge chart, specify a field from a Salesforce object record to use as the chart measure or chart target.

For more information, see the [Reports and Dashboards REST API Developer Guide](#).

Changed Resources: Dashboard Results

We've added new dashboard response properties to support dynamic gauge charts that response automatically to changes in your business goals and conditions.

Dashboards

The `dynamicGaugeSegmentProperties` properties identify the record field from a standard or custom object that's used as the measure (pointer) or target in a gauge chart.

Property	Type	Description
<code>isDynamicUser</code>	Boolean	Indicates whether the user ID is from the person who's running the dashboard (<code>true</code>) or from another user (<code>false</code>).
<code>record</code>	String	The ID of the record in a standard or custom Salesforce object that's used as the chart measure or chart target. This value is valid only if <code>isDynamicUser</code> is false.
<code>fieldName</code>	String	A numeric field from the specified <code>record</code> in the standard or custom Salesforce object.

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 on Lightning Experience functionality, including promotions, primary carts, and order summary adjustments. Check out Experience Cloud Microsites (pilot) and externally managed accounts updates.

IN THIS SECTION:

[Simplified Connect REST API Release Notes](#)

We streamlined the Connect REST API release notes to get you started faster with new and changed resources. The New and Changed Connect REST API Resources section now includes relevant new request body, request parameter, and response body information. Properties and property descriptions for new request and response bodies are no longer included in the release notes. Changed request and response bodies continue to be documented in the release notes.

[New and Changed Connect REST API Resources](#)

These resources are new or have changes.

[Changed Connect REST API Request Bodies](#)

These request bodies have changes.

[Changed Connect REST API Response Bodies](#)

These response bodies have changes.

SEE ALSO:

[ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

[Connect REST API Developer Guide](#)

[Apex Reference Guide: ConnectApi Namespace](#)

[Legacy API Versions 21.0 Through 30.0 Are Being Retired](#)

Simplified Connect REST API Release Notes

We streamlined the Connect REST API release notes to get you started faster with new and changed resources. The New and Changed Connect REST API Resources section now includes relevant new request body, request parameter, and response body information. Properties and property descriptions for new request and response bodies are no longer included in the release notes. Changed request and response bodies continue to be documented in the release notes.

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

New and Changed Connect REST API Resources

These resources are new or have changes.

B2B Commerce on Lightning Experience

Make a secondary cart a primary cart

Make a POST request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/actions/make-primary` resource.

New response body: Commerce Action Result

Get promotions associated with a cart

Make a GET request to the new `/commerce/webstores/webstoreId/carts/cartStateOrId/promotions` resource.

New response body: Cart Promotion Collection

Get promotions associated with items in a cart

Make a POST request to the new

`/commerce/webstores/webstoreId/carts/cartStateOrId/cart-items/promotions` resource.

POST methods typically create an item, but for this resource POST is used to retrieve information.

New request body: Cart Item Promotion Collection Input

New response body: Cart Item Promotion Collection

Get the associated promotions and price adjustments for a cart and its items

Make a POST request to the new `/commerce/webstores/webstoreId/promotions/actions/associate` resource.

New request body: Promotion Association Input

New response body: Promotion Association Collection

Apply associated promotion discounts to a cart and its items

Make a POST request to the new `/commerce/webstores/webstoreId/promotions/actions/execute` resource.

New request body: Promotion Execution Input

New response body: Promotion Execution

Get adjustments for an order summary

Make a GET request to the new `/commerce/webstores/webstoreId/order-summaries/orderSummaryId/adjustments` resource.

New response body: Order Summary Adjustment Collection

Get adjustments for order items

Make a POST request to the new `/commerce/webstores/webstoreId/order-summaries/orderSummaryId/items/adjustments` resource.

POST methods typically create an item, but for this resource POST is used to retrieve information.

New request body: Order Item Summary Adjustment Collection Input

New response body: Order Item Summary Adjustment Collection

CMS Managed Content

Get a managed content folder

Make a GET request to the new `/connect/cms/folders/folderId` resource.

New response body: Managed Content Space Folder Detail

Experience Cloud Microsites (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.

Get a marketing integration form for an Experience Cloud site

Make a GET request to the new `/sites/siteId/marketing-integration/forms/formId` resource.

New response body: Form

Save a marketing integration form for an Experience Cloud site

Make a POST request to the new `/sites/siteId/marketing-integration/forms` resource.

New request body: Form Input

New response body: Form

Submit a marketing integration form for an Experience Cloud site

Make a POST request to the new `/sites/siteId/marketing-integration/forms/formId/data` resource.

New request body: Form Submission Input

New response body: Form Submission

Externally Managed Accounts

Get externally managed accounts available to the context user, including the context user's account, across all Experience Cloud sites

Make a GET request to the `/connect/communities/communityId/external-managed-accounts` resource.

New request parameter: `includeMyAccount`

Get externally managed accounts, including the context user's account, for a store

Make a GET request to the `/commerce/webstores/webstoreId/external-managed-accounts` resource.

New request parameter: `includeMyAccount`

Field Service

Filter records on recordset filter criteria.

Make a POST request to the `/connect/field-service/recordset-filter-criteria/evaluate` resource.

New request body: Recordset Filter Criteria Input

New response body: Recordset Filter Criteria Collection

Flow Orchestrator (Beta)



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](#).

Retrieve orchestration instances with work items related to a record

Make a GET request to the new `/connect/interaction/orchestration/instances` resource.

New required request parameter: `relatedRecordId`

New response body: Flow Orchestration Instance Collection

Salesforce Customer Data Platform (CDP)

Synchronously query Salesforce CDP data with new query parameters

Make a POST request to the `/ssot/query` resource.

New request parameters: `batchSize`, `offset`, `orderBy`

Changed Connect REST API Request Bodies

These request bodies have changes.

B2B Commerce on Lightning Experience

Cart Input

This request body has this new property.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).

Field Service

Shifts from Pattern Input

This request body has these new and changed properties.

- `serviceResourceId`—This property is no longer available. In version 53.0 and later, use `serviceResourceIdList`.
- `serviceResourceIdList`—List of service resource IDs to assign shifts to.

Marketing Cloud

Social Customer Service Configuration Input

This request body has this new property.

- `inboundProcessingConcurrencyEnabled`—Indicates whether your org allows concurrent processing of inbound social posts written by different people (`true`) or not (`false`). Social posts written by the same person are processed one at a time instead of simultaneously. Default value is `false`.

Personalization

Audience Criterion Value Input

This request body has this new property.

- `audienceId`—ID of an audience.

Salesforce Order Management

Order Summary Input

This request body has this new optional property.

- `businessModel`—Specifies whether the order is B2C or B2B. Valid values are:

- B2B
- B2C

Salesforce Scheduler

Available Territory Slots Input

This request body has these new properties.

- `correlationId`—Track requests from external systems.
- `resourceLimitApptDistribution`—Limit the number of resources to show during appointment scheduling when appointment distribution is enabled.

Changed Connect REST API Response Bodies

These response bodies have changes.

B2B Commerce on Lightning Experience

Cart Item

This response body has this changed property.

- `itemizedAdjustmentAmount`—Total itemized adjustment amount for the item, including promotions and excluding taxes.

Cart Summary

This response body has these new and changed properties.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).
- `totalProductAmountAfterAdjustments`—This amount now includes promotions.
- `totalPromotionalAdjustmentAmount`—Total promotional adjustment amount for items in the cart.

B2B2C Commerce

Product Import

This response body has these new properties.

- `cmsWorkspaceId`—Reserved for future use.
- `productAttributeSetProductsCreated`—Number of product attribute set products created by the import.
- `productAttributesCreated`—Number of product attributes created by the import.
- `productAttributesUpdated`—Number of product attributes updated by the import.
- `productMediaCreated`—Reserved for future use.
- `productMediaUpdated`—Reserved for future use.
- `strikethroughPricebookId`—ID of the strikethrough pricebook.

Externally Managed Accounts

External Managed Account Output

This response body has these new properties.

- `accountName`—Name of the external managed account record.
- `address`—Default shipping address of the external managed account.

- `isMyAccount`—Specifies whether the account is the context user's account (`true`) or not (`false`).

Field Service

Shifts from Pattern

This response body has these new properties.

- `error`—Error details for shifts from a pattern.
- `isSuccess`—Indicates if the request is successful (`true`) or not (`false`).

Marketing Cloud

Social Customer Service Configuration

This response body has this new property.

- `inboundProcessingConcurrencyEnabled`—Indicates whether your org allows concurrent processing of inbound social posts written by different people (`true`) or not (`false`). Social posts written by the same person are processed one at a time instead of simultaneously.

Tableau CRM REST API

Capture Tableau CRM dashboard and lens images using the Tableau CRM REST API. Retrieve dataflow jobs by `jobType`, `startedAfter`, or `startedBefore`.

The API release notes have been simplified. For details, see [Simplified Connect REST API Release Notes](#).

IN THIS SECTION:

[New and Changed Tableau CRM REST API Resources](#)

These resources are new or have changes.

[Changed Tableau CRM REST API Request Bodies](#)

These request bodies have changes.

[Changed Tableau CRM REST API Response Bodies](#)

These response bodies have changes.

New and Changed Tableau CRM REST API Resources

These resources are new or have changes.

Get a dashboard image capture

Make a GET request to the new `/wave/dashboard/dashboardId/capture` resource.

New request parameters: `pageId`, `savedViewId`, and `type`

New response body: Capture

Get a lens image capture

Make a GET request to the new `/wave/lens/lensId/capture` resource.

New request parameter: `type`

New response body: Capture

Get dataflow jobs by job types and started before or after times

Make a GET request to the `/wave/dataflowjobs` resource.

New request parameters: `jobTypes`, `startedAfter`, and `startedBefore`

Get a collection of datasets by IDs

Make a GET request to the `/wave/datasets` resource.

New request parameter: `ids`

Get a folder with MRU disabled

Make a GET request to the `/wave/folders/folderId` resource.

New request parameter: `disableMru`

Get a filtered collection of connected objects using search terms

Make a GET request to the `/wave/replicatedDatasets` resource.

New query parameter: `q`

Use a Direct Report Step in a dashboard

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes new Direct Report Step and Direct Report Step Query representations.

Create a Direct Report Step in a dashboard

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes new Direct Report Step Input and Direct Report Step Query Input representations.

Use a Repeater Widget in a dashboard

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes new Repeater Widget Card Properties, Cell Properties, and Parameters representations.

Create a Repeater Widget in a dashboard

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes new Repeater Widget Card Properties, Cell Properties, and Parameters Input representations.

Use a Tooltip Widget in a dashboard

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes the new Tooltip Widget representation.

Create a Tooltip Widget in a dashboard

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes the new Tooltip Widget Input representation.

Use a Recommendation Node in a recipe

Make a GET request to the `/wave/recipes/id` resource.

Response body includes new Recommendation Node and Recommendation Node Parameters representations.

Changed Tableau CRM REST API Request Bodies

These request bodies have changes.

Aggregate Parameters Input

The request body has these new properties.

- `nodeType`—The type of aggregate node. Valid values are `Hierarchical` and `Standard`.

- `parentField`—The parent field.
- `percentageField`—The percentage field.
- `selfField`—The self field.

Cluster Parameters Input

The request body has these new properties.

- `findOptimalClusters`—Indicates whether to find optimal clusters (`true`) or not (`false`).
- `produceScaledColumns`—Indicates whether to produce scaled columns (`true`) or not (`false`).
- `scaling`—The scaling measure. Valid value is `MinMaxScaling`.
- `targetScaledFields`—The collection of target scaled fields.

Export Parameters Input

The request body has this new property.

- `csvHeaderRowValueType`—The export CSV header row value type.

Save Dataset Input

The request body has this new property.

- `isStaged`—Indicates whether the data is staged (`true`) or not (`false`).

Saql Query Input

The request body has this new property.

- `licenseAttributes`—The license attributes for the SAQL query.

Tooltip Content Input

The request body has this new property.

- `widget`—The widget in the tooltip.

Changed Tableau CRM REST API Response Bodies

These response bodies have changes.

Aggregate Parameters

The response body has these new properties.

- `nodeType`—The type of aggregate node. Valid values are `Hierarchical` and `Standard`.
- `parentField`—The parent field.
- `percentageField`—The percentage field.
- `selfField`—The self field.

Cluster Parameters

The response body has these new properties.

- `findOptimalClusters`—Indicates whether to find optimal clusters (`true`) or not (`false`).
- `produceScaledColumns`—Indicates whether to produce scaled columns (`true`) or not (`false`).
- `scaling`—The scaling measure. Valid value is `MinMaxScaling`.
- `targetScaledFields`—The collection of target scaled fields.

Data Connector Type

The response body has this new property.

- `bundle`—The connector bundle that this data connector belongs to. Valid values are `AmazonS3`, `Cdp`, `Salesforce`, `Snowflake`, and `Tableau`.

Dataflow Job

The response body has this new property.

- `waitTime`—The wait time in seconds before starting of a dataflow job.

Event Driven Schedule

The response body has this new property.

- `triggerRule`—The event-based trigger rule that causes a Tableau CRM asset to run.

Export Parameters

The response body has this new property.

- `csvHeaderRowValueType`—The export CSV header row value type. Valid values are `FullyQualifiedName` and `Label`.

Live Connection

The response body has this new property.

- `connectionType`—The type of connection. Valid values are listed in [Data Connector Types Resources](#).

Recipe

The response body has this new property.

- `scheduleAttributes`—The schedule for the recipe.

Replicated Field Collection

The response body has this new property.

- `replicatedDataset`—The reference to the connected object that the fields belong to.

Save Dataset

The response body has this new property.

- `isStaged`—Indicates whether the data is staged (`true`) or not (`false`).

Source Field Collection

The response body has these new properties.

- `dataConnector`—A reference to the data connector that the field collection belongs to.
- `sourceObjectName`—The name of the source object that the field collection belongs to.

Source Object Collection

The response body has these new properties.

- `nextPageUrl`—The URL to get the next page of contents in the collection.
- `totalSize`—The total count of elements in the collection.
- `url`—The URL to get the collection.

Source Object

The response body has this new property.

- `dataConnector`—A reference to the data connector that the source object belongs to.

Sql Step

The response body has this new property.

- `useGlobal`—Indicates whether the SQL step is tied to the global step (`true`) or not (`false`).

Tooltip Content

The response body has this new property.

- `widget`—The widget in the tooltip.

Wave Features

The response body has this new property.

- `orgHasRecipeStageData`—Indicates whether the org has staged data for recipes enabled (`true`) or not (`false`).

Xmd Date

The response body has this new property.

- `format`—The format of the date.

User Interface API

Get the save options for a record layout.

Get the save options for a record layout

The new `saveOptions` property on the Record Layout response body returns a list of save options for the record layout. Save options define behavior that occurs when objects are created or modified using the given layout.

Send an email notification when a Case or CaseComment is created or updated

Use the new `triggerOtherEmail` and `triggerUserEmail` request parameters when creating or updating a record via `/ui-api/records` and `/ui-api/records/{recordId}`.

Use `triggerOtherEmail` to specify whether to send email to users outside the organization. In the Salesforce user interface, this email can be triggered by creating, editing, or deleting a contact for a Case.

Use `triggerUserEmail` to specify whether to send email to users in the organization. In the Salesforce user interface, this email can be triggered by resetting a password, creating a user, or adding comments to a Case.

Specify an assignment rule when creating or updating an Account, Case, or Lead

Use the new `useDefaultRule` request parameter when creating or updating a record via `/ui-api/records` and `/ui-api/records/{recordId}`.

For a Case or Lead, specifies whether to use the default (`active`) assignment rule. For an Account, specifies whether to apply all territory assignment rules when updating the Account.

Specify the record type when checking for duplicate records

Use the new `recordTypeID` request parameter when creating or updating a record with `/ui-api/duplicates/{objectApiName}`.

This parameter is optional, except for the Person Account object. If you're searching for duplicate Person Account records, you must specify the `recordTypeID` for the Person Account object.

Bulk API

These items are new, changed, or deprecated in API version 53.0.

Use More Objects with PK Chunking

Extended coverage across more objects improves query performance. Use eight new PK chunking enabled objects with Bulk API and Bulk API 2.0.

You can now request PK-chunking for Bulk API queries for the following objects. Bulk 2.0 makes the request automatically.

- AssignedResource
- ConversationDefinitionEventLog
- LinkedArticle
- MLRetrainingFeedback
- TaskRelation
- VoiceCallRecording
- WebCart
- WorkloadUnit

For a complete list of PK chunking supported objects, see:

Salesforce Developer Documentation: [PK Chunking Header](#)

Reminder: Bulk API v16-20 Requests Are No Longer Supported

Migrate to a more current version of the API by May 2022, or (best practice) transition to Bulk API 2.0!

Salesforce Help: [Salesforce Platform API Versions 7.0 through 20.0 Retirement](#)

Bulk API 2.0

These items are new, changed, or deprecated in API version 53.0.

Get More Information About Bulk 2.0 Workloads With Event Monitoring

We've enhanced Event Monitoring's EventLogFile with the addition of a new event type: `BulkApi2`. If you're an Event Monitoring customer, you can now get `BulkApi2` events from the EventLogFile object every time a job is created, a status is updated, or a job is deleted. This new event monitoring coverage for Bulk API 2.0 is an improvement over the monitoring capabilities of the original Bulk API.

Previously, you obtained Bulk API 2.0 information from the Bulk Data Load Jobs page in Setup. Now, you have the option of analyzing the EventLogFile object for Bulk API 2.0 job information. With the addition of this new event type, you can monitor the following Bulk API 2.0 parameters:

- The type of data processed via Bulk API 2.0 operations, and how much of that data was processed.
- Bulk API 2.0 limits.
- For jobs, track how long it takes to complete, database, and CPU usage.
- Understand users and the operations they performed.
- Detailed errors and failures.

Events represent the steps in the Bulk API 2.0 workflow and changes in job state.

Salesforce Help: [Bulk API 2.0 Event Type](#)

New Location for Links to Bulk API 2.0 Older Documentation

Links to older versions of the Bulk API 2.0 documentation (Winter '18 - Spring '21) have been relocated to the Bulk API and Bulk API 2.0 Developer Guide. The new topic with all of the links is under the Bulk API 2.0 topic:

Salesforce Help: [Bulk API 2.0 Older Documentation](#)

Tooling API New and Changed Objects

Tooling API includes new and changed objects and fields.

Salesforce Overall

Update permissions to use `DeveloperName` field on affected Tooling API objects

To view, group, sort, or filter the `DeveloperName` field on affected Tooling API objects, you must have View Setup and Configuration OR View `DeveloperName` permission. See the [knowledge article](#) for more information.

Customization

Indicate that a permission set group is session-based

Use the new `HasActivationRequired` field on the existing `PermissionSetGroup` object.

Create field visibility rules for the User object

The existing `TargetEntity` field on the `FieldRestrictionRule` object now supports the User object.

See if a field is classified as containing personal info

Use the new supported value `PersonalInfo` in the existing `ComplianceGroup` field on the `FieldDefinition` object.

Einstein Automate

Package input parameter translations for custom flow screen components

Use the new `inputParameter` field on the `FlowScreenFieldTranslation` object.

Pardot

Track external activity with Pardot

Use the new `MarketingAppExtension` object to submit external activities to Pardot.

Assign external activities to a Pardot business unit

Use the new `MarketingAppExtAssignment` object to associate tracked external activities to a specific Pardot business unit.

Create external activity types

Use the new `MarketingAppExtActivity` object to choose which activity types to track in Pardot.

Metadata API

Metadata API includes new and changed types and fields.

Salesforce Overall

Update permissions to use `developerName` field on affected Metadata API types

To view, group, sort, or filter the `developerName` field on affected Metadata API types, you must have View Setup and Configuration OR View `DeveloperName` permission. See the [knowledge article](#) for more information.

Choose how in-app guidance appears

Use the `targetPageKey3` field (introduced in API version 51.0, this type has been added to the *Metadata API Developer Guide*) and `targetPageKey4` field on the `PromptVersion` subtype of the `Prompt` metadata type.

Assign in-app guidance to record types to determine if in-app guidance is specific to a record type

Use the new `targetRecordType` field on the `PromptVersion` subtype of the `Prompt` metadata type.

Point to specific elements on a page with targeted prompts (Generally Available)

Use the value `Targeted`, which is now generally available, in the `displayType` field on the `PromptVersion` subtype of the `Prompt` metadata type.

DEPRECATED: The `enableIBILOptOutDashboards`, `enableIBILOptOutEvents`, `enableIBILOptOutReports`, and `enableIBILOptOutTasks` fields on the `UserEngagementSettings` metadata type are deprecated

These fields are deprecated in API version 51.0 and later.

REMOVED: The `enableAuraDepAccessChksCRUCPref` and `enableSplitViewOnStandard` fields on the `LightningExperienceSettings` metadata type are removed

The `enableAuraDepAccessChksCRUCPref` field is removed in API version 51.0 and later because the feature is no longer available. The `enableSplitViewOnStandard` field is removed in API version 52.0 and later because the feature is no longer available.

Analytics**Enable new Analytics features for using LWC in Dashboards, editing reports inline, managing recipe settings, and using SQL in the Query API**

Enable these features using new fields on the `AnalyticsSettings` metadata type.

- Enable the use of Lightning Web Components in Tableau CRM dashboards with the `enableLwcInDashboards` field (beta).
- Enable the ability to edit Lightning Experience reports inline with the `enableReportInlineEdit` field.
- Enable the use of SQL in the Tableau CRM Query API with the `enableWaveSqlInQueryApi` field (beta).
- Enable the use of SQL in the Tableau CRM Query API with the `enableWaveSqlInQueryApi` field (beta).
- Enable opt out for Data Prep recipe pre-step caching with the `recipePreCachingOptOut` field.
- Enable the use of staged data in Data Prep recipes with the `recipeStagedDataPref` field.

REMOVED: The `enableSqlDataset` and `enableSqlLiveDataset` fields on the `AnalyticsSettings` metadata type have been removed

These fields are removed in API version 53.0 and later. SQL and SQL live datasets are always enabled for Tableau CRM.

Commerce**Configure the Salesforce Order Management B2C Commerce Integration to apply the Salesforce org's duplicate and matching rules for Accounts, Contacts, and Person Accounts to shopper records**

Use the new `enableDuplicateManagement` field on the existing `OrderManagementSettings` metadata type.

Customization**Define events associated with a Lightning page**

Use the new `events` field and the new subtypes on the `FlexiPage` metadata type: `FlexiPageEvent`, `FlexiPageEventSourceProperty`, `FlexiPageEventTarget`, `FlexiPageEventPropertyMapping`, `FlexiPageEventTargetProperty`.

Identify unique instances of a component or field on a Lightning page

Use the new `identifier` field on the `ComponentInstance` and `FieldInstance` subtypes on the `FlexiPage` metadata type. This field is required.

Indicate that a permission set group is session-based

Use the new `hasActivationRequired` field on the existing `PermissionSetGroup` metadata type.

Create field visibility rules for the User object

The existing `targetEntity` field on the `FieldRestrictionRule` metadata type now supports the `User` object.

Hide your chosen personal information fields in user records from external users

Use the new `enableEnhancedConcealPersonalInfo` field on the existing `UserManagementSettings` metadata type.

Enable an updated user interface that includes an assignment expiration for permission sets and permission set groups (beta)

Use the `psaExpirationUIEnabled` field on the `UserManagementSettings` metadata type. Introduced in API version 52.0, this field has been added to the *Metadata API Developer Guide*.

Differentiate translated strings for quick actions when you don't want the field label and informational message to be identical

Use the new `aspect` field on the metadata types `Translations` and `CustomObjectTranslations`. Introduced in API version 53.0, the `aspect` field has been added to the *Metadata API Developer Guide*.

Einstein Automate**Roll back a transaction and cancel all its pending record changes in Flow Builder**

Use the new `recordRollbacks` field on the `Flow` metadata type. For more information, see [Roll Back Pending Record Changes When a Flow Element Fails at Run Time](#).

Configure settings for automatic document generation

Use the new `DocumentGenerationSetting` subtype of the `Settings` metadata type.

Configure settings for OmniStudio

Use the new `OmnitInteractionConfig` metadata type.

Configure data access and caching settings for OmniStudio FlexCards

Use the new `OmnitInteractionAccessConfig` metadata type.

Connect Nonconsecutive Elements in Auto-Layout (Beta)

Use the new `isGoTo` field on the `FlowConnector` subtype of the `Flow` metadata type. When set to true, this connector is a Go To connector. For more information, see [Connect to More Elements Across the Auto-Layout Canvas \(Beta\)](#).

Package input parameter translations for custom flow screen components

Use the new `inputParameter` field on the `FlowScreenFieldTranslation` metadata type.

Send email notifications every time a workflow rule, process, or Apex trigger updates the same record that triggered the automation

Use the new `sendEmailsEvenWhenAutomationUpdatesSameRecord` field on the `EmailAdministrationSettings` metadata type. For more information, see [Send Email Notifications for Every Automated Field Update](#).

Create orchestrations with Flow (Beta)

Use the new `Orchestrator` value in the `processType` field on the `Flow` metadata type. For more information, see [Flow Orchestrator \(Beta\)](#).

Manage a step in a stage in an orchestration (Beta)

Use the new `FlowStageStep` metadata type.

Manage a collection of steps within a stage in an orchestration (Beta)

Use the new `FlowOrchestratedStage` metadata type.

Manage a user assigned to complete an assigned interactive step in an orchestration (Beta)

Use the new `FlowStageStepAssignee` metadata type.

Create Einstein Next Best Action strategies with Flow (Pilot)

Use the new `RecommendationStrategy` value in the `processType` field on the `Flow` metadata type. For more information, see [Build Einstein Next Best Action Strategies in Flow Builder \(Pilot\)](#).

Map values to a collection of recommendations (Pilot)

Use these new fields and values on the `FlowCollectionProcessor` subtype of the `Flow` metadata type.

- To specify that a `FlowCollectionProcessor` is used to map values to recommendations, use the new `RecommendationMapCollectionProcessor` value in the `FlowCollectionProcessorType` field.
- To define the variable to which the current value in the collection is assigned, use the new `assignNextValueToReference` field.
- To define a mapping to apply to a collection field, use the new `mapItems` field.
- To define the object of the collection defined in the `collectionReference` field, use the new `outputObjectType` field. The valid value is `Recommendation`.

Experience Cloud**Include an audience within another audience**

Use the new `Audience` value of the `type` field of the `AudienceCriterion` subtype and the new `audienceDeveloperName` field of the `AudienceCriteriaValue` subtype of the `Audience` metadata type.

Allow the Builder-based Service Not Available page to override an existing Service Not Available page when an experience is published.

Use the new `enableExperienceBundleBasedSnaOverrideEnabled` field on the existing `Network` metadata type.

Customize the device activation email for community users.

Use the new `deviceActEmailTemplate` field on the existing `Network` metadata type.

Hide badges in Experience sites from guest users

Use the new `enablePreventBadgeGuestAccess` field on the existing `CommunitiesSettings` metadata type.

Specify a URL prefix for an Experience site

Use the new `urlPathPrefix` field on the existing `ExperienceBundle` metadata type. Introduced in API version 51.0, this type has been added to the *Metadata API Developer Guide*.

Sales**REMOVED: The `adjustmentsSettings`, `forecastRangeSettings`, and `quotasSettings` fields on the `ForecastingTypeSettings` metadata type were removed**

Use the `globalAdjustmentsSettings`, `globalForecastRangeSettings`, and `globalQuotasSettings` fields on the `ForecastingSettings` metadata type instead.

Skip territory assignment rules during account insert jobs

Use the `tm2BypassRealignAccInsert` field on the `Territory2Settings` metadata type.

Enable additional Einstein Activity Capture settings and features

Use the following new fields on the `EACSettings` metadata type: `addRcCompToFlexiPages`, `autoPopulateGoogleMeetLinks`, `enableActivityAnalyticsPref`, `salesforceEventsOnlyPref`, `syncInternalEvents`.

Enable Salesforce Meetings and the Zoom integration feature

Use the `MeetingsSettings` metadata type. Introduced in API version 51.0, this type has been added to the *Metadata API Developer Guide*.

Salesforce CDP**Create a top-level data kit container definition**

Use the new `DataPackageKitDefinition` metadata type.

Retrieve information about a data kit, such as CRM bundle and Data Models

Use the new `DataPackageKitObject` metadata type.

Security and Identity**BEHAVIOR CHANGE: The `urlPatterns` field on the `CorsWhitelistOrigin` metadata type now supports Mozilla® Firefox® and Google Chrome™ extensions**

You can now include Firefox and Chrome browser extensions in your cross-origin resource (CORS) allowlist.

REMOVED: The `enableSetPasswordInApi` field on the `PasswordPolicies` subtype of the `SecuritySettings` metadata type has been removed.

The `enableSetPasswordInApi` field was deprecated in API version 51.0 and removed in API version 52.0.

Let users verify their identity using a built-in authenticator (Beta)

Use the new `enableBuiltInAuthenticator` field on the `SessionSettings` subtype of the `SecuritySettings` metadata type.

The field is available as Beta in API version 53.0 and later.

Service**Enable the Workforce Engagement Configuration App**

Use the new `enableWorkforceEngagementConfiguration` field on the `WorkforceEngagementSettings` metadata type.

Hide record information in emails sent when Web-to-Case case creation fails

Use the new `shouldHideRecordInfoInEmail` field on the existing `WebToXSettings` metadata type.

Link a conversation channel to your bot

Use the new `ConversationDefinitionChannelProvider` subtype of the `Bot` metadata type. Introduced in API version 51.0, this subtype has been added to the *Metadata API Developer Guide*.

Specify an Embedded Messaging channel for bot mapping

Use the new `EmbeddedMessaging` value in the `messageType` field on the `ConversationContextVariableMapping` subtype of the `Bot` metadata type. Introduced in API version 50.0, this type has been added to the *Metadata API Developer Guide*.

Link translated labels to labels within elements of your bot dialogs

Use these new fields on their respective subtypes of the `BotVersion` metadata type:

- On the `BotMessage` subtype, use the `messageIdentifier` field.
- On the `BotQuickReplyOption` subtype, use the `quickReplyOptionIdentifier` field.
- On the `BotStep` subtype, use the `stepIdentifier` field.
- On the `BotVariableOperation` subtype, use the `variableOperationIdentifier` field.

Introduced in API version 53.0, these fields have been added to the *Metadata API Developer Guide*.

Override default bot variable operation behavior

Use the new `askCollectIfSet` and `autoSelectIfSingleChoice` fields on the `BotVariableOperation` subtype of the `BotVersion` metadata type. Introduced in API version 51.0, these fields have been added to the *Metadata API Developer Guide*.

Manage scheduling rules in Workforce Engagement Management

Use the new `SchedulingRule` metadata type.

Einstein

Einstein Search is turned on by default in Lightning Experience, so everyone can benefit from AI-powered search at no extra cost. Use your own external models in Einstein Discovery for even better predictions. Einstein Key Accounts Identification ranks your best accounts to help you optimize your account-based marketing efforts. Launch one Einstein Bot in many languages, helping to reduce administrative workload and providing more choices for interaction. Read up on these features and more, and get ready to work smarter with all that Einstein has to offer.

Salesforce Overall

Einstein Search

All features of Einstein Search are now on by default at no extra cost. Users gain a smarter search without giving up search features that they rely on. Einstein Search delivers three main features. Personalization returns relevant search results based on a user's activity. Natural language search 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

Operationalize externally built models that you easily upload and deploy into Salesforce. Translate unstructured data into valuable insights with sentiment analysis. Get predictive and prescriptive intelligence directly in your automated business processes.

Customization

Einstein Recommendation Builder

Try Einstein and build recommendations at no additional cost. Independent service vendors (ISVs) and partners can now use managed packages to save time and seamlessly share custom recommendations with other Salesforce orgs.

Development

Support for Compound Fields in Standard Forms

When the value of a form field is detected as an address entity, it's treated as a compound field. Separate fields populated with street, city, state, postal code (ZIP code), and country are returned in the `normalizedText` field.

Einstein Automate

Einstein Bots

Thanks to an overhaul of how bots process multiple languages, you can launch one bot in many languages, reducing your administrative workload. Article Answers' expanded language support and an 87% decrease in build time means your bot delivers AI-driven responses in record time. Support for External Services and Model Sharing means you can extend bots across the Salesforce platform. Updates to Input Recommender, Bot Analytics, and the Template Bot set up your bots for success.

Pardot

Explore Einstein Key Accounts on List Views (Generally Available)

Einstein Key Account Identification is now generally available. This handy tool helps you prioritize your account-based marketing tactics by assigning a tier ranking and providing insights, which show characteristics that an account has in common with other successful accounts. The Einstein tier and insights appear on its record, and you can add the tier field to list views for ranking data at a glance.

[Filter Pardot Automations with Einstein Account Tier Field](#)

Leverage the power of Einstein AI in automation and segmentation rules, dynamic lists, and Engagement Studio. After the Einstein Key Accounts Identification model starts assigning account tiers, you can segment and automate on that tier value in Pardot.

Sales

[See Which Deals Are Unlikely to Close This Month with Einstein Deal Insights](#)

Einstein Deal Insights predicts when opportunities scheduled to close this month are unlikely to be won during the same month. With this new insight, sales managers and their teams can forecast more accurately and maintain more accurate pipelines.

Service

[Einstein for Service](#)

Help your agents respond to customer queries quickly and consistently with Einstein for Service Cloud. We refined the template generation process for Reply Recommendations to remove short or repetitive replies and focus Einstein's predictive powers on the more complex parts of conversations.

Einstein Automate

Compose intelligent workflows with Salesforce Flow, Einstein Bots, OmniStudio, and Flow Orchestrator (beta). 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 Bots](#)

Thanks to an overhaul of how bots process multiple languages, you can launch one bot in many languages, reducing your administrative workload. Article Answers' expanded language support and an 87% decrease in build time means your bot delivers AI-driven responses in record time. Support for External Services and Model Sharing means you can extend bots across the Salesforce platform. Updates to Input Recommender, Bot Analytics, and the Template Bot set up your bots for success.

[Flow Orchestrator \(Beta\)](#)

Build sophisticated business processes that involve multiple people over multiple stages with multiple flows. Flow Orchestrator gives you the power to automate complex processes without writing any code.

Salesforce Flow

Among other Salesforce Flow enhancements, now a record-triggered flow can launch other flows via Subflow elements. Without requiring code, record-triggered flows can access external systems via flow paths that run asynchronously. In screen flows, choices are easier than ever to set up, and you can customize footer labels (beta). Flows can send outbound messages, so you can retire all your workflow rules.

Einstein Next Best Action

Use Einstein Next Best Action to automatically show recommendations and flow actions to your users. You can now build recommendation strategies using the actions and logic capabilities of Flow Builder (pilot).

Einstein Recommendation Builder

Explore ways to build recommendations with Try Einstein. Build recommendations for managed packages with Einstein Recommendation Builder.

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.

Expression Sets and Decision Matrices

An expression set is a series of calculations performed on matrix lookups and user-defined variables and constants. A decision matrix is a table that looks up information using multiple input dimensions and returns the corresponding output value. You can populate a decision matrix with input and output values manually or from a CSV file.

Expression sets and decision matrices can automate the creation of complex quotes. Together, expression sets and decision matrices can guide an agent through a series of questions, pull data from various sources, and present customized quotes or eligibility determinations.

Expression sets and decision matrices accept JSON input from a REST API, an OmniScript, or an integration procedure. Inputs can come from more than one source. The output can be a proposal or PDF, or JSON data for populating an OmniScript, integration procedure, or REST API request.

FlexCards

Add input elements to a FlexCard, overwrite the global SLDS or Newport stylesheets on specific FlexCards, enable accessibility support on chart and datatable elements, and refresh your FlexCard in preview. Add multiple actions to an event listener, trigger a datasource from an action, and use a merge field to set the dynamic channel name for a pubsub event. Create a public property from the FlexCard Designer and call it as a session variable, set a private variable in a FlexCard to define and evaluate at runtime, and pass an object's API name to a component in a FlexCard on a record page. Conditionally enable actions on an event listener, remove conditionally hidden elements from the rendered HTML, and conditionally display actions in a menu element.

OmniScripts

Create and save record entries in modals, use autocomplete in input elements, display a Message element as a toast, clear Edit Block values, and set a fixed footer on mobile devices. Run decision matrices with the Decision Matrix Action and run expression sets with the Calculation Action. OmniStudio's DocuSign integration includes security enhancements for the connection between your Salesforce org and a DocuSign account.

Integration Procedures

Run decision matrices with the Decision Matrix Action and run expression sets with the Calculation Action. Run Apex methods or Invocable Actions with the Remote Action.

For OmniStudio release notes, see [OmniStudio](#). For OmniStudio details and pricing, contact your Salesforce account executive.

Einstein Bots

Thanks to an overhaul of how bots process multiple languages, you can launch one bot in many languages, reducing your administrative workload. Article Answers' expanded language support and an 87% decrease in build time means your bot delivers AI-driven responses in record time. Support for External Services and Model Sharing means you can extend bots across the Salesforce platform. Updates to Input Recommender, Bot Analytics, and the Template Bot set up your bots for success.

IN THIS SECTION:

[Teach Your Bot to Speak Multiple Languages \(Beta\)](#)

When you enable your bot to speak multiple languages, you can reduce administrative time and deliver a consistent customer experience across multiple markets. Add secondary bot-supported languages and define translations at the dialog level to deliver multiple translations of the same bot at once. Intent model scoring at the language level helps you measure language performance and improve the bot experience for all customers.

[Get More from Your Knowledge Base with Article Answers Improvements \(Beta\)](#)

Learn about improvements that make Article Answers more convenient and customizable. These changes are automatically available.

[Generate Utterances in More Languages with Input Recommender \(Beta\)](#)

Input Recommender now supports Chinese (Simplified and Traditional) and Portuguese (Brazil and European), so you can build high-quality training data for new and existing intents in even more languages.

[Solve Bot Problems Fast with Improved Bot Analytics](#)

Respond to in-dialog notifications that flag dialogs causing errors over the past 7 days. Direct linking takes you to the specific error logs, reducing search time to seconds. Now available directly in the product, time-based bot reports help you assess bot performance per dialog. View data over days or by the hour for specific insights on customer interactions with your bot. The new Conversation Definition Session Metric object makes it easier to access session-level reporting fields. New metrics give you a deeper understanding of bot conversations.

[Unlock the Power of External Services in Bot Builder](#)

Integrating your bot with a registered external service is now as easy as adding an action to a dialog. You can add an external service action to your bot from the Bot Builder. Previously, you could add an external service action to your bot only with a flow or Apex.

[Build Bots Faster from a Template \(Generally Available\)](#)

Get a new bot up and running with the help of Einstein Bots' first template, now generally available. The template comes prebuilt with conversational text and Salesforce flows. You can choose dialogs for common service and sales use cases, such as creating a case or lead, looking up an order, or adding a comment to an existing case. Plus, the template comes with intent data preloaded, allowing the bot to process customer inputs right away.

[Reuse Your Einstein.ai Intent Models Across Other External Orgs \(Beta\)](#)

Use your well-tuned Einstein.ai intent models with external orgs to extend your investment. You can now share intent classification models in the Einstein Bot Builder, which you can use to classify intent on other Salesforce datasets. Remove sharing of intent models at any time using the Model Sharing dashboard.

[Collect and Manage Customer Information with New System Entities](#)

The new Email Address and Phone Number system entities make it easier to collect, store, and share these data types in Einstein Bots—no regex required.

[Access Bots Faster Using the Improved Setup Home Page](#)

User experience enhancements help you easily navigate around the Einstein Bots Setup page. Smart features, such as Input Recommender and Article Answers, are available on a new tab for easy access, and notifications flag you when they need attention. The list of bots loads faster, and a search bar delivers the bot you need in seconds. The Date Created column replaces Bot User to help you find the bot you need faster. New in-app guidance guides admins toward implementing smart features.

[Channels Are Now Connections](#)

We renamed the Channels section on the Bot Overview page to Connections to reflect the expanded Einstein Bots connection universe. Bots is a platform designed to connect the best in digital automation to the digital spaces that your customers use everyday, and we expect Bots to connect to more things.

SEE ALSO:

[Einstein Release Notes](#)

Teach Your Bot to Speak Multiple Languages (Beta)

When you enable your bot to speak multiple languages, you can reduce administrative time and deliver a consistent customer experience across multiple markets. Add secondary bot-supported languages and define translations at the dialog level to deliver multiple translations of the same bot at once. Intent model scoring at the language level helps you measure language performance and improve the bot experience for all 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.



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](#).

How: Add the secondary language on Translation Workbench first, and then add it to the Bot Overview page. To edit translations for a particular language, select it in the dropdown at the top of the screen. To give your users the option to choose a language, use a question dialog step and use the language names as static choices.

Spanish Detail Activate

Dialog Name Intent Name Dialog Description Einstein Off

Ask Preferred Language Ask Preferred Language

Dialog Details Dialog Translations Dialog Intent 2 Utterances

Translations Compare to Language English (Primary)


Dialog Step Type	Dialog Step Detail	Spanish	English (Primary)
1 Dialog	Dialog Name	Pregunte el idioma preferido	Ask Preferred Language
2 Question	Bot Asks	¿En qué idioma prefieres hablarme?	What language do you prefer to speak to me in?
3 Question	Choice Option Template		
4 Question	Choice #1	Inglés 🇬🇧	English 🇬🇧
5 Question	Choice #2	Español 🇪🇸	Spanish 🇪🇸
6 Question	Choice #3	Japonés 🇯🇵	Japanese 🇯🇵

Cancel Save

Get More from Your Knowledge Base with Article Answers Improvements (Beta)

Learn about improvements that make Article Answers more convenient and customizable. These changes are automatically available.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

 **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: You get the same AI-powered search of previous versions of Article Answers with enhancements based on your feedback.

Surface a knowledge article for multiple questions

Now you can add multiple questions to a knowledge article to capture more customer variations and improve the accuracy of answers returned. To add an additional question, edit your article as usual and start each question on a new line of the Question field.

Add knowledge articles faster with reduced training time

We reduced the average time it takes to create a build from your knowledge base from up to 2 hours to as little as 15 minutes. Your actual build time depends on the size of your knowledge base.

Respond in more languages

Now your bot can automatically return conversational answers in English, French, German, Italian, and Spanish. Article Answers returns articles based on the preferred language the user selects for the bot. If the user doesn't select a preferred language, Article Answers uses the bot's primary language, which you can set on the Bot Overview page.

Choose how many knowledge articles to return

You can choose to return up to five knowledge articles when Article Answers finds multiple relevant articles. Previously, bots with Article Answers returned up to three articles by default. Specify a maximum number of results for your bot in the Article Answers section of the Bot Overview page.

Troubleshoot with UI enhancements and new documentation

More detailed error messages for training job failures make it easier to create a successful build from your knowledge base. Popovers guide you seamlessly through Article Answers setup. Plus, we've published troubleshooting tips to help you solve problems fast.

SEE ALSO:

[Salesforce Help: Deliver Knowledge Articles with Article Answers \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Article Answers Troubleshooting Tips \(can be outdated or unavailable during release preview\)](#)

Generate Utterances in More Languages with Input Recommender (Beta)

Input Recommender now supports Chinese (Simplified and Traditional) and Portuguese (Brazil and European), so you can build high-quality training data for new and existing intents in even more 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.



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](#).

How: You can activate Input Recommender on the Einstein Bots main page. To launch Input Recommender, click **Get Recommendations** from a new intent, or click **Find Similar** next to any utterance.

To view the available languages, click **View details** in the Active Languages section of the setup page.

SEE ALSO:

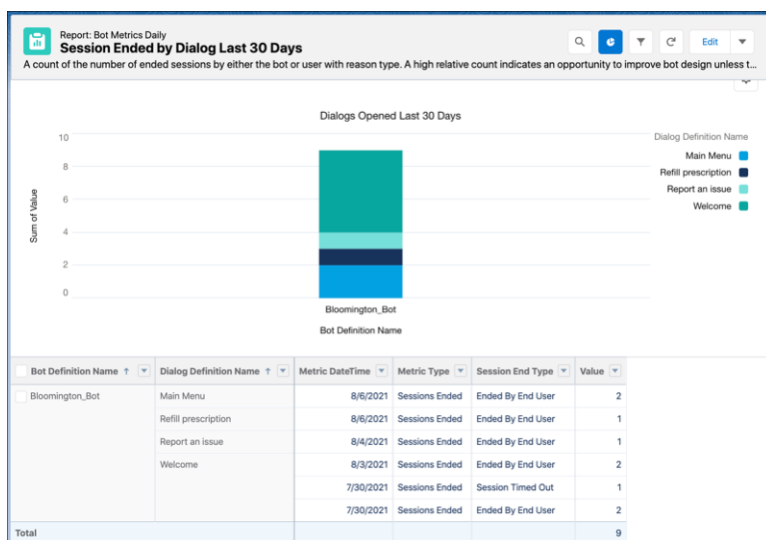
[Salesforce Help: Use Input Recommender to Generate Utterances \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Solve Bot Problems Fast with Improved Bot Analytics

Respond to in-dialog notifications that flag dialogs causing errors over the past 7 days. Direct linking takes you to the specific error logs, reducing search time to seconds. Now available directly in the product, time-based bot reports help you assess bot performance per dialog. View data over days or by the hour for specific insights on customer interactions with your bot. The new Conversation Definition Session Metric object makes it easier to access session-level reporting fields. New metrics give you a deeper understanding of bot conversations.

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.

How: Bot error reporting is available automatically for all users. New Einstein Bots customers can view the Einstein Bots Reports folder in the Reports tab. Existing customers must turn on Einstein Bots on the Bots Setup page to install the new folder.



SEE ALSO:

[Salesforce Help: Improve Your Bot \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Bot Data Reference Guide \(can be outdated or unavailable during release preview\)](#)

Unlock the Power of External Services in Bot Builder

Integrating your bot with a registered external service is now as easy as adding an action to a dialog. You can add an external service action to your bot from the Bot Builder. Previously, you could add an external service action to your bot only with a flow or Apex.

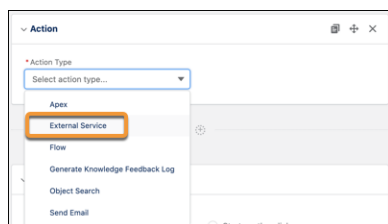
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Who: To register an external service, you must have the Customize Application user permission.

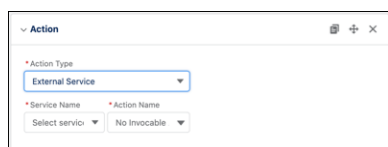
Why: Sometimes the data that your bot needs to personalize customer requests is stored outside of Salesforce. For example, a banking customer wants to update their account password and billing address in a single bot conversation. Or a retail customer starts a return process for a purchase and expects the bot to return a unique tracking number. Now you can automate these multi-platform requests directly from the Bot Builder, without writing a single line of code.

How: To register an external service, from Setup, in the Quick Find box, enter *External Services*, and then select **External Services**. Click **New External Service**, and then follow the steps in the External Services Wizard.

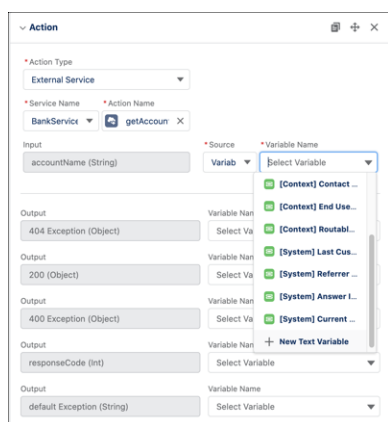
To add an external service action to your bot, from the Bot Builder menu, click **Dialogs**. Edit your desired dialog, and then add an Action element. From the Action Type field, select **External Service**.



The external services registered in your Salesforce org and their associated actions are available in the Service Name and Action Name dropdown menus.



Use bot variables to specify inputs and outputs.



SEE ALSO:

[Salesforce Help: Add an External Service Action](#) (can be outdated or unavailable during release preview)

[Salesforce Help: External Services](#) (can be outdated or unavailable during release preview)

[Trailhead: External Services](#)

Build Bots Faster from a Template (Generally Available)

Get a new bot up and running with the help of Einstein Bots' first template, now generally available. The template comes prebuilt with conversational text and Salesforce flows. You can choose dialogs for common service and sales use cases, such as creating a case or lead, looking up an order, or adding a comment to an existing case. Plus, the template comes with intent data preloaded, allowing the bot to process customer inputs right away.

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.

Why: When you create a bot from the core bot template, you can go live right out of the box. Or you can customize any part of the bot template to meet your business needs.

How: New bot users can click **Create a New Bot** on the Bot main page to launch Guided Setup. Users with existing bots can click **New** on the Bot main page.

SEE ALSO:

[Salesforce Help: Create an Einstein Bot from a Template](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Learn About the Template Bot](#) (can be outdated or unavailable during release preview)

Reuse Your Einstein.ai Intent Models Across Other External Orgs (Beta)

Use your well-tuned Einstein.ai intent models with external orgs to extend your investment. You can now share intent classification models in the Einstein Bot Builder, which you can use to classify intent on other Salesforce datasets. Remove sharing of intent models at any time using the Model Sharing dashboard.

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.



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](#).

How: To share a model on the Model Management page, select the Model Sharing tab. Enter the destination Einstein.ai org ID and click **Share**. You can share models only with external Einstein.ai orgs using an org ID obtained through signup at [Einstein Platform Services](#).

SEE ALSO:

[Salesforce Help: Share Your Intent Model Externally \(Beta\)](#)(can be outdated or unavailable during release preview)

Collect and Manage Customer Information with New System Entities

The new Email Address and Phone Number system entities make it easier to collect, store, and share these data types in Einstein Bots—no regex required.

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.

SEE ALSO:

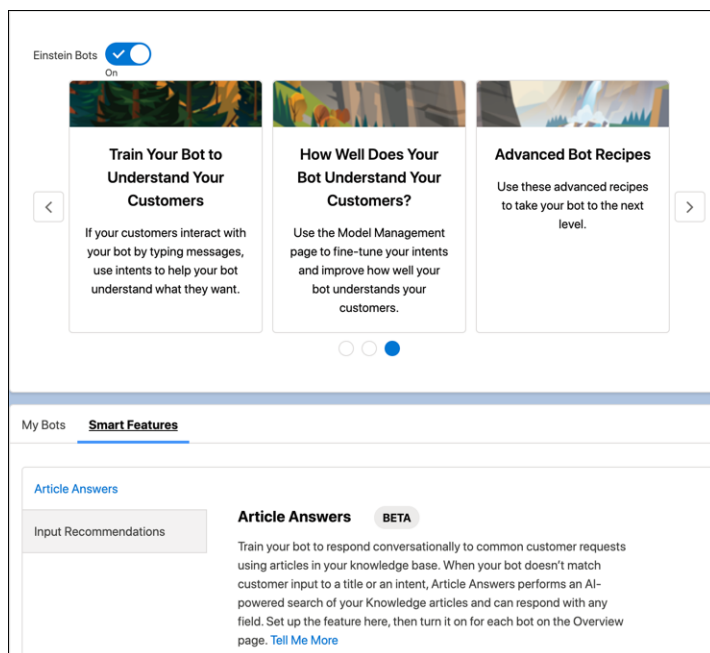
[Salesforce Help: What's an Entity?](#) (can be outdated or unavailable during release preview)

Access Bots Faster Using the Improved Setup Home Page

User experience enhancements help you easily navigate around the Einstein Bots Setup page. Smart features, such as Input Recommender and Article Answers, are available on a new tab for easy access, and notifications flag you when they need attention. The list of bots loads faster, and a search bar delivers the bot you need in seconds. The Date Created column replaces Bot User to help you find the bot you need faster. New in-app guidance guides admins toward implementing smart features.

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.

How: Access the Smart Features tab on the Bot Setup page.



Channels Are Now Connections

We renamed the Channels section on the Bot Overview page to Connections to reflect the expanded Einstein Bots connection universe. Bots is a platform designed to connect the best in digital automation to the digital spaces that your customers use everyday, and we expect Bots to connect to more things.

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.

Flow Orchestrator (Beta)

Build sophisticated business processes that involve multiple people over multiple stages with multiple flows. Flow Orchestrator gives you the power to automate complex processes without writing any code.

IN THIS SECTION:

[Orchestrate Multi-User Processes with Flow Orchestrator \(Beta\)](#)

Combine your automated processes in a single interface with Flow Orchestrator. Use Flow Orchestrator's no-code approach to create orchestrations and transform flows into steps organized by stages. Benefits of Flow Orchestrator include more flexibility to create approval processes, better ability to assign work to any Salesforce user, and more control over record lifecycles.

[Increase Productivity with Flow Orchestrator Work Guide \(Beta\)](#)

Display assigned work items generated by orchestrations on relevant records. Users can then see and complete their assigned work without wasting time switching between tools.

[Identify Bottlenecks and Opportunities with Flow Orchestrator \(Beta\)](#)

Flow Orchestrator gives you a unique perspective on the execution of your business processes. It can help you identify inefficiencies over multiple execution cycles, drive continuous enhancements, and improve your overall business productivity.

Orchestrate Multi-User Processes with Flow Orchestrator (Beta)

Combine your automated processes in a single interface with Flow Orchestrator. Use Flow Orchestrator's no-code approach to create orchestrations and transform flows into steps organized by stages. Benefits of Flow Orchestrator include more flexibility to create approval processes, better ability to assign work to any Salesforce user, and more control over record lifecycles.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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](#)

How: From the Flows page in Setup, click **New Flow**. In New Flow, click **All + Templates** and select **Flow Orchestrator (Beta)**. Select either **Autolaunched Orchestration (Beta)** or **Record-Triggered Orchestrations (Beta)** and click **Next**. Add stages to your orchestration, and then add steps to your stages. Use Decision elements, stage exit conditions, and step entry and exit conditions to determine how your orchestration runs.

Increase Productivity with Flow Orchestrator Work Guide (Beta)

Display assigned work items generated by orchestrations on relevant records. Users can then see and complete their assigned work without wasting time switching between tools.

Where: This change applies to Lightning Experience in Essentials, Professional, 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](#).

How: When you create an interactive step in an orchestration, specify the record where work for the assigned user is to be displayed. In Lightning App Builder, place the Flow Orchestrator Work Guide (Beta) component on the record page. A running orchestration generates work for an assigned user, and the user receives an email with a link to the specified record page. There, they can complete their assigned work in the Work Guide component.

Identify Bottlenecks and Opportunities with Flow Orchestrator (Beta)

Flow Orchestrator gives you a unique perspective on the execution of your business processes. It can help you identify inefficiencies over multiple execution cycles, drive continuous enhancements, and improve your overall business productivity.

Where: This change applies to Lightning Experience in Essentials, Professional, 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](#).

How: To see the details for a running orchestration, click the orchestration name in the Work Guide component on the associated record page. On the Orchestration Instance page, click the Related tab.

Salesforce Flow

Among other Salesforce Flow enhancements, now a record-triggered flow can launch other flows via Subflow elements. Without requiring code, record-triggered flows can access external systems via flow paths that run asynchronously. In screen flows, choices are easier than ever to set up, and you can customize footer labels (beta). Flows can send outbound messages, so you can retire all your workflow rules.

IN THIS SECTION:[Flow Builder](#)

Record-triggered flows now support Subflow elements and asynchronous paths that integrate with external systems. Screen flows offer easier choice setup and custom footer labels (beta), and they can roll back pending record changes when an element fails at run time. Scheduled paths offer to-the-minute granularity and let you set the batch size. Outbound messages are now available as a flow core action, so you can retire more workflow rules. Translate the input attributes of flow screen components with Translation Workbench.

[Flow Debugging](#)

In Flow Builder, you can now debug scheduled paths and paths that run asynchronously. When debugging record-triggered flows, you can update the triggering record's fields right in the Debug flow window.

[Flow and Process Management](#)

The Flows page in Setup can now display triggering objects and platform events. Before you import a large set of records or publish numerous platform event messages, you can easily check whether any flows are triggered by the object or platform event.

[Flow Extensions](#)

Custom property editors now support action and screen component inputs that have record and Apex-defined data types. Use External Services with MuleSoft Anypoint Platform APIs to quickly generate invocable actions for flows. Elevate the intelligence of your flows with predictions, predictive factors, and improvement recommendations from Einstein Discovery actions.

[Flow and Process Release Updates](#)

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

[Flow and Process Run-Time Improvements in API Version 53.0](#)

These updates affect only flows and processes that are configured to run on API version 53.0 or later. Versioned updates let you test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

Flow Builder

Record-triggered flows now support Subflow elements and asynchronous paths that integrate with external systems. Screen flows offer easier choice setup and custom footer labels (beta), and they can roll back pending record changes when an element fails at run time. Scheduled paths offer to-the-minute granularity and let you set the batch size. Outbound messages are now available as a flow core action, so you can retire more workflow rules. Translate the input attributes of flow screen components with Translation Workbench.

IN THIS SECTION:[Connect a Record-Triggered Flow to an External System Using an Asynchronous Path](#)

Finally, you can use a record-triggered flow to integrate with an external system and update external objects—without writing any code. Add an asynchronous path that runs after the original transaction for the triggering record is successfully committed. Now your record-triggered flows can perform actions that were previously limited by transaction boundaries. For example, use an asynchronous path to post a message to Slack, update a record in Heroku, or place an order using a third-party fulfillment system. Both asynchronous and scheduled paths are subject to the same asynchronous per-transaction Apex limits.

[Call Another Flow from a Record-Triggered Flow Using a Subflow Element](#)

You asked for it! Subflow elements are now available for record-triggered flows that run after a record is saved or before a record is deleted. Now you can break your automation into building blocks and reduce the complexity of a flow. From within a flow, call another reusable flow to perform a common task. For example, when you create an opportunity, call an autolaunched flow that determines which region to assign the opportunity to.

[Roll Back Pending Record Changes When a Flow Element Fails at Run Time](#)

To roll back a transaction and cancel all its pending record changes in a screen flow, add the new Roll Back Records element in a fault path. Previously, when a transaction ended, its pending record changes were saved to the database even if a flow element failed in the transaction.

[Supercharge Scheduled Paths with Enhancements for Minutes, Batching, and Limits](#)

It's been a minute since you asked, but we heard you. Now you can specify in minutes the time that you want a scheduled path to run. You can also set a batch size to improve performance and avoid hitting Apex governor limits. And now the less restrictive asynchronous limits apply to scheduled paths, making it easier to complete complex operations without hitting limits.

[Send an Outbound Message from Your Record-Triggered Flow](#)

Outbound messages are available as a core action in Flow Builder. Send a SOAP message from a record-triggered flow to a designated endpoint. For example, notify an external service when a high-priority case is created. Perhaps you used outbound message actions with workflow rules and approval processes. Now outbound message actions are available for record-triggered flows that run after the record is saved.

[Enjoy a Streamlined Trigger Setup Experience in Flow Builder](#)

We heard your requests and redesigned how you set up and configure triggers in Flow Builder. The process now follows the order that most admins expect. Select the triggering object, configure the trigger, set entry conditions, and choose how best to optimize your flow—all within a single window.

[Translate Labels for More Flow Screen Components with Translation Workbench](#)

Developers can now control which custom flow screen component labels and other flow screen fields are available to be translated by using Translation Workbench. We also provide packaging support for the translated fields. And most Salesforce-provided flow screen components are updated to support this functionality.

[Customize Button Labels in the Flow Screen Footer \(Beta\)](#)

In Flow Builder, you can now easily customize the Previous, Pause, Next, and Finish button label text. With customized screen navigation options, you can let a user know what to expect when the user clicks the button. Previously, to customize the footer labels, you built a custom component.

[Connect to More Elements Across the Auto-Layout Canvas \(Beta\)](#)

In Auto-Layout, you can now connect to elements that don't follow the usual consecutive auto-layout paths. Use the new Go To connector to connect an element to any other element except an End element. Because Auto-Layout now supports certain nonconsecutive paths, you can use it to work on more of your flows.

[Read Loops More Easily in Auto-Layout \(Beta\)](#)

We updated loops in Auto-Layout to make them easier to follow. Loops in Auto-Layout now travel in a clockwise direction and display the After Last path to the right of the Loop element.

[Set Up Flow Screen Choice Options with Fewer Clicks](#)

Easily create standalone choice options as you configure choice components, and reduce the number of clicks it takes to configure a choice component.

[Edit Choice Resources Directly from Flow Screen Editor](#)

You can easily edit a flow screen's choice resources with the new edit button for each choice option. For example, you realize that you misspelled the label after creating a choice option. Now you can correct the choice label with a click. Previously, even simple changes to a choice resource required you to stop editing the screen so that you could find and edit the choice resource from the toolbox.

[Avoid Creating Incompatible Resources from Choice Components](#)

When you select New Choice Resource, the Resource Type option now lists only valid resources for a choice option: Picklist Choice Set, Record Choice Set, and standalone choice. So when you create a resource from a choice component, such as Picklist, it's no longer necessary to remember which resources are valid options and which ones aren't.

Navigate Flow Builder More Easily with Improved Keyboard Shortcuts (Beta)

A number of keyboard shortcuts in Flow Builder are now updated. In auto-layout, element menus are easier to navigate, and you can reach the zoom panel via the F6 key. In freeform and auto-layout, some keyboard shortcuts now provide greater browser compatibility.

Create a Managed-Installed Flow That Admins Can Override and Customize

Most flows installed from managed packages serve as integral parts of a larger application, such as order management. Now a developer can create a flow that an admin can override and use to customize parts of an application. After the admin creates and activates the flow override, any requests then execute the override and not the original flow. The admin no longer spends time updating any of the references to the original flow.

Other Changes to Flow Screen Components

Some Salesforce-provided flow screen components were rebuilt using Lightning Web Components (LWC). For existing LWC screen components that are configured to provide help, users now click instead of hover over the info bubble to see the help text. We fixed an issue with rich text formatting in help text. And you now get more run-time error information for custom Aura components.

Connect a Record-Triggered Flow to an External System Using an Asynchronous Path

Finally, you can use a record-triggered flow to integrate with an external system and update external objects—without writing any code. Add an asynchronous path that runs after the original transaction for the triggering record is successfully committed. Now your record-triggered flows can perform actions that were previously limited by transaction boundaries. For example, use an asynchronous path to post a message to Slack, update a record in Heroku, or place an order using a third-party fulfillment system. Both asynchronous and scheduled paths are subject to the same asynchronous per-transaction Apex limits.

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

Why: In Spring '21, scheduled paths became available in record-triggered flows. Now we added asynchronous paths that run in the background and don't delay the execution of your original triggered transaction. Use an asynchronous path to execute a long-running operation, such as a callout to an external web service or any operation that you want to run on its own time. You can also use an asynchronous path to avoid the mixed DML error. For example, in a flow that's triggered to run when an opportunity is created or updated, use an asynchronous path to update a value on a user record.

You can't define a time for an asynchronous path to run as you can for a scheduled path. And in situations when system resources are unavailable, the execution of an asynchronous path will be delayed.

How: Asynchronous paths are available for record-triggered flows that run after the record is saved. Open the Start element.

When to Run the Flow for Updated Records ⓘ

☐ Every time a record is updated and meets the condition requirements

☒ Only when a record is updated to meet the condition requirements

• Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☒ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed.

Configure the flow to run only when a record is updated to meet the condition requirements, or select the Is Changed operator in a condition. Select **Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed**.

When a new or updated record triggers your flow to run, an asynchronous path is queued until it runs. You can monitor an asynchronous path on the Time-Based Workflow page in Setup.

If you deselect **Include a Run Asynchronously path**, an asynchronous path is removed from your flow.

SEE ALSO:

[Salesforce Spring '21 Release Notes: Run Part of a Record-Triggered Flow After the Triggering Event](#)

[Apex Developer Guide: Execution Governors and Limits](#)

[Apex Developer Guide: sObjects That Cannot Be Used Together in DML Operations](#)

[Heroku Dev Center: Heroku External Objects with Salesforce Connect](#)

Call Another Flow from a Record-Triggered Flow Using a Subflow Element

You asked for it! Subflow elements are now available for record-triggered flows that run after a record is saved or before a record is deleted. Now you can break your automation into building blocks and reduce the complexity of a flow. From within a flow, call another reusable flow to perform a common task. For example, when you create an opportunity, call an autolaunched flow that determines which region to assign the opportunity to.

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

How: Create an autolaunched referenced flow that performs a common task. As necessary, create input and output variables that are sObjects of the same type.

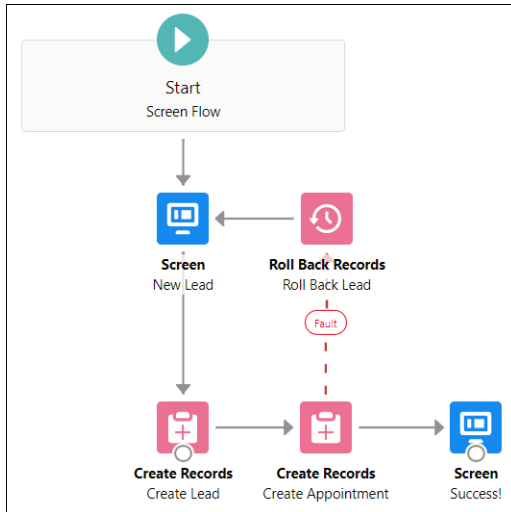
Then open a record-triggered flow. Drag the Subflow element onto the canvas. Search for and select the referenced flow. Assign the values of the `$Record` and `$Record__Prior` global variables to the input and output variables. When the record-triggered flow executes the Subflow element, the triggering record's values are available in the referenced flow's `$Record` and `$Record__Prior` global variables.

Roll Back Pending Record Changes When a Flow Element Fails at Run Time

To roll back a transaction and cancel all its pending record changes in a screen flow, add the new Roll Back Records element in a fault path. Previously, when a transaction ended, its pending record changes were saved to the database even if a flow element failed in the transaction.

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

Why: Oftentimes, when a flow element fails, you also want to cancel pending record changes that make sense only when the flow element succeeds. If the element fails, saving the pending record changes in the current transaction doesn't make sense. For example, your screen flow creates a lead and the associated appointment. The flow ends with the Screen element that shows a success message. The Create Records element for the appointment has a fault connector to the Roll Back Records element. After the Roll Back Records element, the flow executes the initial Screen element.



If the flow fails to execute the Create Records element for the appointment, the flow executes the elements in the fault path. The Roll Back Records element rolls back the current transaction and cancels all its pending records. The current transaction starts after the first Screen element executes and ends when another Screen element executes. Because the Create Records element for the lead is part of the current transaction, the pending lead isn't saved to the database.

Previously, if the flow failed to execute the Create Records element for the appointment, the flow executed the elements in the fault path. The pending lead was saved when the transaction ended, so a lead was created without an appointment.

If the flow fails to execute the Create Records element for the appointment without a fault connector or Roll Back Records element, the entire flow fails. The flow rolls back all transactions and their pending records are canceled.

SEE ALSO:

[Salesforce Help: Flows in Transactions \(can be outdated or unavailable during release preview\)](#)

Supercharge Scheduled Paths with Enhancements for Minutes, Batching, and Limits

It's been a minute since you asked, but we heard you. Now you can specify in minutes the time that you want a scheduled path to run. You can also set a batch size to improve performance and avoid hitting Apex governor limits. And now the less restrictive asynchronous limits apply to scheduled paths, making it easier to complete complex operations without hitting limits.

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

Why: Previously, you could specify only a number of hours or days before or after the time source for a scheduled path to run. The time source for a scheduled path is either when the triggering record is created or updated, or the value of a record date/time field.

 **Note:** In some cases, a scheduled-path interview won't execute until after system resources become available.

And to help avoid hitting a per-transaction Apex limit with a scheduled path, now you can specify a batch size for it. The batch size is the number of records that a path can process at the same time. The default and maximum value is 200, and the minimum is 1. For example, if you specify a batch size of two and seven records are scheduled to be processed in the same time interval, Flow Builder groups them into four batches.

Scheduled paths and asynchronous paths are batched differently. In a scheduled path, all the records that meet the conditions and are scheduled to be processed in the same minute are grouped up to the batch size into one batch.

In an asynchronous path, a set of records is always processed together in one batch and never combined with other records. For example, if 20 accounts are updated in a single update operation, those same 20 accounts are processed in one batch.

How: Configure a scheduled path for a record-triggered flow that runs after the record is saved.

Specify the number of minutes before or after the time source for a scheduled path to run (1). Set a batch size smaller than 200 to improve performance (2).

SEE ALSO:

[Apex Developer Guide: Execution Governors and Limits](#)

Send an Outbound Message from Your Record-Triggered Flow

Outbound messages are available as a core action in Flow Builder. Send a SOAP message from a record-triggered flow to a designated endpoint. For example, notify an external service when a high-priority case is created. Perhaps you used outbound message actions with workflow rules and approval processes. Now outbound message actions are available for record-triggered flows that run after the record is saved.

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

How: Drag an Action element onto the canvas.

New Action

Filter By
Category ▼

Case
Account
Contact
Event
Lead
Note
Opportunity
Outbound Message
Messaging
Notifications
Email

Action
outbound

- OM
outboundMessage-Account.A
- OM1
outboundMessage-Account.OM1
- OM2
outboundMessage-Case
- OM3
outboundMessage-Case.Case_Outbound_Message

Lights, camera, action!
Select an action to configure.

Cancel Done

In the Action field, begin to enter `outbound`. You can also filter by the Outbound Message category or the Core Action type. Select an outbound message action that has the same object type as the triggering record, for example, case.

New Action

Filter By
Category ▼

Account
Contact
Event
Lead
Note
Opportunity
Outbound Message
Messaging
Notifications
Email
Approvals

Action
OM2

Use values from earlier in the flow to set the inputs for the "OM2" core action. To use its outputs later in the flow, store them in variables.

* Label
Case Outbound Message

* API Name
Case_Outbound_Message

Description

Nothing to set or store here
This action has no inputs or outputs.

Cancel Done

You don't need to enter input parameters when you configure an outbound message action. The triggering record's ID is passed implicitly to an outbound message action, which is different than other flow core actions.

After the flow runs, review the Outbound Messages page in Setup to confirm that the message was sent.

SEE ALSO:

[Salesforce Help: Outbound Message Actions \(can be outdated or unavailable during release preview\)](#)

Enjoy a Streamlined Trigger Setup Experience in Flow Builder

We heard your requests and redesigned how you set up and configure triggers in Flow Builder. The process now follows the order that most admins expect. Select the triggering object, configure the trigger, set entry conditions, and choose how best to optimize your flow—all within a single window.

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

How: Create a record-triggered flow, or open the Start element of one.

The screenshot shows the 'Configure Start' configuration window for a Salesforce Flow. It contains the following sections:

- Select Object (1):** A dropdown menu showing 'Account'.
- Configure Trigger (2):** Radio buttons for 'Trigger the Flow When': 'A record is created', 'A record is updated', 'A record is created or updated' (selected), and 'A record is deleted'.
- Set Entry Conditions (3):** A section for 'Condition Requirements' with a dropdown set to 'Any Condition Is Met (OR)'. Below is a table with columns 'Field', 'Operator', and 'Value'. The first row contains 'BillingCity', 'Equals', and 'Tulsa'. There is an '+ Add Condition' button.
- When to Run the Flow for Updated Records:** Radio buttons for 'Every time a record is updated and meets the condition requirements' and 'Only when a record is updated to meet the condition requirements' (selected).
- Optimize the Flow for:** Two options: 'Fast Field Updates' (4) and 'Actions and Related Records' (5). 'Fast Field Updates' is described as 'Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.' 'Actions and Related Records' is described as 'Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.' The 'Actions and Related Records' option is selected with a blue checkmark.

At the bottom, there is a checkbox 'Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed' and 'Cancel' and 'Done' buttons.

Select the object (1), and configure the trigger (2). Specify the entry conditions (3). Choose how you want to optimize the flow. A flow that makes fast field updates (4) runs before the record is saved to the database. A flow that can update any record and perform actions (5) runs after the record is saved to the database.

Translate Labels for More Flow Screen Components with Translation Workbench

Developers can now control which custom flow screen component labels and other flow screen fields are available to be translated by using Translation Workbench. We also provide packaging support for the translated fields. And most Salesforce-provided flow screen components are updated to support this functionality.

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

How: To allow translation of a custom component's input attribute, in the definition file, add the translatable property to the attribute, and set it to true.



Note: Salesforce Flow ignores default values for input properties that are specified in custom component definitions. As a result, you can't use Translation Workbench to translate default values specified in a custom component's definition file.

Customize Button Labels in the Flow Screen Footer (Beta)

In Flow Builder, you can now easily customize the Previous, Pause, Next, and Finish button label text. With customized screen navigation options, you can let a user know what to expect when the user clicks the button. Previously, to customize the footer labels, you built a custom component.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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](#).

Why: Sometimes you need a flow screen's navigation buttons to more accurately indicate what happens when a user clicks a button. For example, you're designing a screen flow and using a Create Records element that creates a contact record. On the flow screen, you change the Finish button to Create Contact and the Previous button to Go Back. After the user clicks **Create Contact**, the screen flow creates the contact record.

The screenshot shows a flow screen titled 'Contact Info'. It contains four input fields: 'First Name', 'Last Name', 'Email' (with the placeholder 'you@example.com'), and 'Company'. At the bottom of the screen, there is a footer bar with two buttons: 'Go Back' (a light blue button) and 'Create Contact' (a dark blue button).

How: To relabel a button, select **Use a custom label (Beta)**, and enter the text you want to use.

Screen Properties

Next or Finish Button

- ☐ Use the standard label
- ☒ Use a custom label (Beta)
- ☐ Hide Next or Finish

* Next or Finish Button Label

Create Contact

Previous Button

- ☐ Use the standard label
- ☒ Use a custom label (Beta)
- ☐ Hide Previous

* Previous Button Label

Go Back

Note: Custom footer labels don't support merge fields.

Connect to More Elements Across the Auto-Layout Canvas (Beta)

In Auto-Layout, you can now connect to elements that don't follow the usual consecutive auto-layout paths. Use the new Go To connector to connect an element to any other element except an End element. Because Auto-Layout now supports certain nonconsecutive paths, you can use it to work on more of your flows.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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](#).

How: To connect to an element that isn't next on the auto-layout path, click on the connector that you want to change, and then select **Connect to element**. This menu option replaces and improves upon the Merge with another path option, as connecting some elements merges their paths for you.

Add Element

→ Connect to element

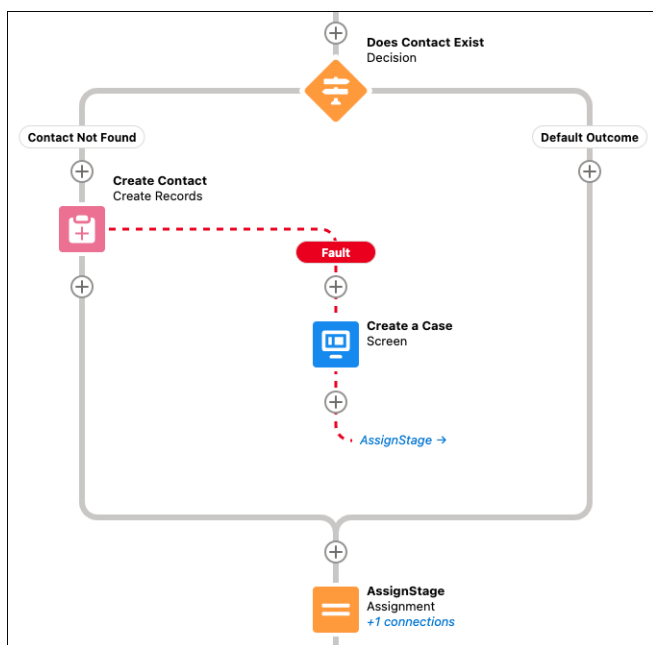
Interaction

- Action
Perform an action outside of the flow. ...
- Subflow
Launch another flow that's available in...

Logic

- Assignment
Set variable values.
- Decision

To finish creating the Go To connector, click in the element that you want to connect.



To change the destination of a Go To connector, click on that connector, and then select **Reroute connector**. To delete a Go To connector, click on that connector, and then select **Delete connector**.

Read Loops More Easily in Auto-Layout (Beta)

We updated loops in Auto-Layout to make them easier to follow. Loops in Auto-Layout now travel in a clockwise direction and display the After Last path to the right of the Loop element.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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](#).

Set Up Flow Screen Choice Options with Fewer Clicks

Easily create standalone choice options as you configure choice components, and reduce the number of clicks it takes to configure a choice component.

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

How: To add a standalone choice, enter your text in the Choice field, and select the option to create that choice. Flow Builder creates the standalone choice for you and adds a reference to it in the Choice field.

Curious how Flow Builder creates the choice resource for you? Here's how it maps what you entered in the Choice field to the various settings in the choice resource.

Choice Setting	Flow Builder Sets It To
Choice Label	The value you entered in the choice text field
Choice Value	
API Name	The text you entered, formatted for API name requirements
Data Type	The data type of the choice component

 **Note:** This quick-create functionality is supported only for choice components with a Text data type.

SEE ALSO:

[Avoid Creating Incompatible Resources from Choice Components](#)

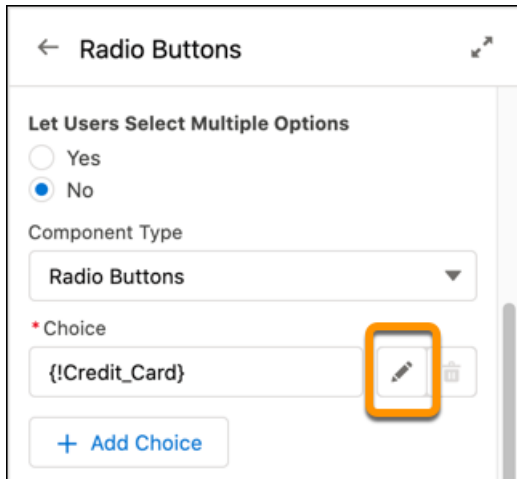
[Edit Choice Resources Directly from Flow Screen Editor](#)

Edit Choice Resources Directly from Flow Screen Editor

You can easily edit a flow screen's choice resources with the new edit button for each choice option. For example, you realize that you misspelled the label after creating a choice option. Now you can correct the choice label with a click. Previously, even simple changes to a choice resource required you to stop editing the screen so that you could find and edit the choice resource from the toolbox.

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

How: After you add a choice option, click the pencil icon.



SEE ALSO:

[Avoid Creating Incompatible Resources from Choice Components](#)

[Set Up Flow Screen Choice Options with Fewer Clicks](#)

Avoid Creating Incompatible Resources from Choice Components

When you select New Choice Resource, the Resource Type option now lists only valid resources for a choice option: Picklist Choice Set, Record Choice Set, and standalone choice. So when you create a resource from a choice component, such as Picklist, it's no longer necessary to remember which resources are valid options and which ones aren't.

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

How: To create a choice resource, click in the choice text field and select **New Choice Resource** in the dropdown menu.

← Picklist

✓ Configure Choices

Let Users Select Multiple Options

☐ Yes

☒ No

Component Type

Picklist

* Choice

{!credit_card}

* Choice

{!debit_card}

* Choice

Enter value or search resou

+ New Choice Resource

CHOICES

A_a credit_card
Text

A_a debit_card
Text

In the list of resource types, notice that the list now only includes what's valid in this context: Choice, Record Choice Set, and Picklist Choice Set. In previous releases, it was easy to accidentally create a resource that wasn't compatible in the context of the component.

New Choice Resource

* Resource Type

Select...

Choice

Record Choice Set

Picklist Choice Set

Cancel Done

And for another enhancement that makes your choice-building life easier: After choosing a choice component, the New Choice Resource editor automatically inherits the data type value from the choice component.

SEE ALSO:


[Set Up Flow Screen Choice Options with Fewer Clicks](#)

[Edit Choice Resources Directly from Flow Screen Editor](#)

Navigate Flow Builder More Easily with Improved Keyboard Shortcuts (Beta)

A number of keyboard shortcuts in Flow Builder are now updated. In auto-layout, element menus are easier to navigate, and you can reach the zoom panel via the F6 key. In freeform and auto-layout, some keyboard shortcuts now provide greater browser compatibility.

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

 **Note:** This update includes changes to some keyboard shortcuts in auto-layout, which 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 auto-layout, use the Tab key to cycle through the open element menu controls, and use the arrow keys to cycle through the open element menu options.

In auto-layout and freeform, these keyboard shortcuts are updated.

Action	macOS	Windows
Show keyboard shortcuts	Cmd+/ 	Ctrl+/
Zoom in	Cmd+Option+=	Ctrl+Alt+=
Zoom out	Cmd+Option+-	Ctrl+Alt+-
Zoom to fit	Cmd+Option+1	Ctrl+Alt+1
Reset zoom	Cmd+Option+0	Ctrl+Alt+0

Create a Managed-Installed Flow That Admins Can Override and Customize

Most flows installed from managed packages serve as integral parts of a larger application, such as order management. Now a developer can create a flow that an admin can override and use to customize parts of an application. After the admin creates and activates the flow override, any requests then execute the override and not the original flow. The admin no longer spends time updating any of the references to the original flow.

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

Why: For example, a developer makes a screen flow overridable. An admin wants to make org-specific customizations to the screen flow, which is embedded in a Lightning page. The admin overrides the flow and changes a screen. After the admin saves and activates the override, the newly customized flow, and not the original flow, appears on the page. No changes to the page are necessary.

Previously, if an admin wanted to change a managed-installed flow, their only option was to create a new, editable flow from a template. Then they changed all the references to the flow, such as processes, REST API calls, or custom buttons or links. Changing all the references can be challenging and in some cases impossible.

Also, now when you save a flow or do a save as, you see some new fields in advanced settings:

Save the flow

*Flow Label: My New Flow *Flow API Name: My_New_Flow

Description:

[Hide Advanced](#)

How to Run the Flow:

*Type: Screen Flow

Source Template: (1)

Template: ☐ (2)

Original Flow: (3)

Overridable: ☐ (4)

*API Version for Running the Flow: 54

Interview Label:

My New Flow ({!\$Flow.CurrentDateTime})

For a flow created from a template, the name of the template appears in Source Template (1). When a flow is a template, Template (2) is automatically selected. When a flow overrides another flow, the name of the flow that it overrides appears in Original Flow (3). When a flow is overridable, Overridable (4) is automatically selected. In most cases, the values in Source Template (1) and Original Flow (3) are set automatically and not edited.

How: For a developer to make a flow overridable: You create a flow and select **Overridable** (4). Typically, a flow that's overridable is included as part of a managed package.

For a developer to make a flow a template: You create a flow and select **Template** (2). Typically, a flow template is included as part of a managed package.

For an admin to create a flow override from an overridable flow: You can't change a managed-installed flow that's overridable. But you can do a save as:

Save as flow override

i This creates a flow that overrides and is linked to the original flow. Then any requests execute the override, and not the original flow. Use an override to customize parts of an application in a managed package.

*Flow Label: Override of Verify Address *Flow API Name: Override_of_Verify_Address

Description:

[Show Advanced](#)

We also added these column headings to the flows list view in Setup: Overridable, Overridden By, Overrides, and Source Template.

Flow Label	Template	Package State	Overridable	Overridden By	Overrides	Source Template
Outbound New Appointment	<input checked="" type="checkbox"/>	Managed-Installed	<input type="checkbox"/>			
Inbound New Guest Appointment	<input checked="" type="checkbox"/>	Managed-Installed	<input type="checkbox"/>			
Inbound Cancel Appointment	<input checked="" type="checkbox"/>	Managed-Installed	<input type="checkbox"/>			

Other Changes to Flow Screen Components

Some Salesforce-provided flow screen components were rebuilt using Lightning Web Components (LWC). For existing LWC screen components that are configured to provide help, users now click instead of hover over the info bubble to see the help text. We fixed an issue with rich text formatting in help text. And you now get more run-time error information for custom Aura components.

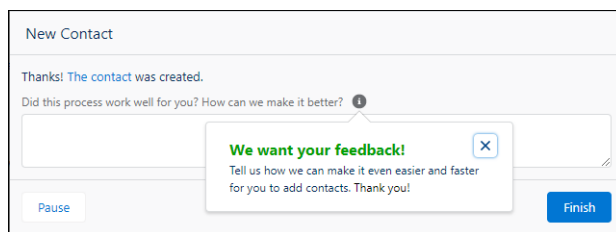
Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.


How: Review the changes for each type of screen component. If needed, update the affected components in your flow screens.

Some Flow Screen Components Rebuilt Using LWC

These Salesforce-provided screen components were rebuilt: Address, Display Text, Email, Long Text Area, Slider, and Toggle. Now screen readers can read the labels associated with those components. The components are also easier for Salesforce to support in all the places that can run screen flows. With a few exceptions, the rebuilt screen components look and behave the same as in previous releases.

- For each rebuilt component that's configured to validate user input, the error message appears when the user shifts the focus to another screen component. Previously, the error message appeared when users navigated away from the flow screen.
- For each rebuilt component that's configured to provide help, the help text appears in a popover. Previously, the help text appeared in a separate window.



- For each Long Text Area component that's configured to provide help, the info bubble is now larger and appears at the end of the component label. Previously, when a label wrapped over multiple lines, the info bubble appeared in a subsequent line.
- For the Display Text component:
 - Text indentation now works. Previously, if you clicked  to indent some text, the text wasn't indented at run time.
 - The HTML tag `<dfn>` is no longer supported. At run time, content inside a `<dfn>` tag is displayed without any special styling.
 - The HTML tag `<bdo>` is no longer supported. At run time, content inside a `<bdo>` tag is displayed but doesn't override the base direction of text on the page. For example, if the page's text direction is left to right, content inside a `<bdo>` tag is no longer changed to go right to left.

Users Click Info Bubbles to View Help Text in LWC Screen Components

The behavior of info bubbles has changed for these Salesforce-provided screen components: Checkbox, Currency, Date, Date & Time, Multi-Select Picklist, Number, Password, Picklist, Radio Buttons, and Text. For each LWC component that's configured to provide help, the user clicks the info bubble to view the help text in a white popover. Previously, the user hovered over the info bubble to view the help text in a blue popover.

Rich Text Issue Fixed for Help Text in LWC Screen Components

For LWC screen components that are configured to provide help, we fixed an issue that prevented rich text formatting and images from appearing at run time.

Some Custom Aura Component Errors Provide Information for Developers

For certain types of screen flow run-time errors, a window now provides error and stack trace information that you can relay to the component developer. This window appears only when the flow screen doesn't contain a Section component and the error is thrown by the `init` event handler for the custom Aura component. Previously, such errors resulted only in an animated spinner.

SEE ALSO:

[Salesforce Help: Provided Flow Screen Components \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Validate User Input on Flow Screens \(can be outdated or unavailable during release preview\)](#)

Flow Debugging

In Flow Builder, you can now debug scheduled paths and paths that run asynchronously. When debugging record-triggered flows, you can update the triggering record's fields right in the Debug flow window.

IN THIS SECTION:

[Change Record Field Values Temporarily While Debugging Record-Triggered Flows](#)

Busy testing your record-triggered flows? Now, when you debug record updates, you can update field values in the Debug flow window. No need to go back to a record and make updates there. You can even debug entry conditions and decision outcomes that use the Is Changed operator to determine whether a flow will run when certain field values on the record change.

[Debug Scheduled Paths in Record-Triggered Flows](#)

We added paths to the list of debugging enhancements for record-triggered flows. You can debug a scheduled path, a path that runs immediately, or a path that runs asynchronously.

[View the Flow Interview GUID in a Flow Error Email](#)

In each flow error email, you now get the globally unique identifier (GUID) of the failed flow interview. Previously, when a batch of flow interviews failed unexpectedly, the email didn't specify which interview was saved.

[Choose More Options When You Debug a Flow](#)

When you debug a flow, you now see element labels in Flow Builder and in flow error emails. In Flow Builder, choose whether to show element API names and expand or collapse debug details. Previously, element API names always appeared. In Flow Builder, all debug details always appeared.

[View Flow Error Details More Quickly in Flow Builder](#)

When you debug a flow, Flow Builder now shows flow error details when the governor limit is reached for maximum CPU time. Previously, Flow Builder could take several minutes to show error details.

[Error Details for Referenced Flows and Pause Elements from Managed Packages Are Hidden](#)

When a flow that's installed from a managed package fails, Flow Builder and flow error emails don't show some error details. If the flow from a managed package contains a Pause element that fails, the element's error details aren't shown. If a flow that's created in your org executes a Subflow element that references a flow installed from a managed package, the referenced flow can fail. The Subflow element's error details show only the input and output values for the referenced flow.

Change Record Field Values Temporarily While Debugging Record-Triggered Flows

Busy testing your record-triggered flows? Now, when you debug record updates, you can update field values in the Debug flow window. No need to go back to a record and make updates there. You can even debug entry conditions and decision outcomes that use the Is Changed operator to determine whether a flow will run when certain field values on the record change.

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

Why: Previously, while you debugged a flow, you could select a record to test but you couldn't view or update any of its fields. Now you can temporarily update fields on the triggering record while you test specific scenarios. Rest assured that any record updates you make while you debug flows are rolled back and aren't permanently saved in your org.

For example, a flow is configured to run when a record is created or updated. The flow includes a Decision element that checks to see whether the Mailing City value is changed. While debugging the flow, you change the Mailing City value. Then in debug details, you can confirm that the Mailing City value was changed and the expected decision outcome executed.

How: Debug a record-triggered flow.

The screenshot shows the 'Debug flow' window. At the top, under 'Run the Flow As if the Record Is:', the 'Updated' radio button is selected (1). Below this, the 'Triggering Record' section shows a search bar with 'Acme' selected (2). The 'Update the Triggering Record' section (3) contains a grid of input fields for account information, including Annual Revenue (\$1,000,000.00), Billing City (New York), Billing Country (USA), Billing Zip/Postal Code (31349), Billing State/Province (NY), Billing Street (10 Main Rd.), Account Name (Acme), Employees (680), Owner ID (Andy Anderson), Parent Account ID (Search Accounts...), Account Phone ((212) 555-5555), Shipping City (New York), and Shipping Country (USA). At the bottom right are 'Cancel' and 'Run' buttons.

Run the flow as if the record is updated (1). Select the triggering record for the debug run (2). Update field values on the triggering record to test specific scenarios (3). Click **Run**. The flow runs as if your updates were made.

Debug Scheduled Paths in Record-Triggered Flows

We added paths to the list of debugging enhancements for record-triggered flows. You can debug a scheduled path, a path that runs immediately, or a path that runs asynchronously.

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

How: Debug a record-triggered flow. Select the path you want to debug.

View the Flow Interview GUID in a Flow Error Email

In each flow error email, you now get the globally unique identifier (GUID) of the failed flow interview. Previously, when a batch of flow interviews failed unexpectedly, the email didn't specify which interview was saved.

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

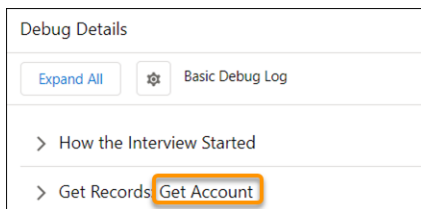
Choose More Options When You Debug a Flow

When you debug a flow, you now see element labels in Flow Builder and in flow error emails. In Flow Builder, choose whether to show element API names and expand or collapse debug details. Previously, element API names always appeared. In Flow Builder, all debug details always appeared.

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

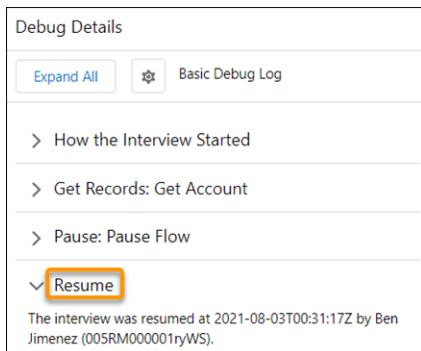
How: In Flow Builder, expand all debug details or show the element API names or both. When you select preferences, the number of selected preferences appears instead of the preference labels.

By default, the debug details are collapsed and show element labels.



If an error occurs for an element, the debug details for that element are expanded. If the flow executes a Pause element, the pause configuration is shown.

When a flow interview resumes, we now show the Resume heading. Previously, no heading appeared.



View Flow Error Details More Quickly in Flow Builder

When you debug a flow, Flow Builder now shows flow error details when the governor limit is reached for maximum CPU time. Previously, Flow Builder could take several minutes to show error details.

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

Error Details for Referenced Flows and Pause Elements from Managed Packages Are Hidden

When a flow that's installed from a managed package fails, Flow Builder and flow error emails don't show some error details. If the flow from a managed package contains a Pause element that fails, the element's error details aren't shown. If a flow that's created in your org executes a Subflow element that references a flow installed from a managed package, the referenced flow can fail. The Subflow element's error details show only the input and output values for the referenced flow.

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

Flow and Process Management

The Flows page in Setup can now display triggering objects and platform events. Before you import a large set of records or publish numerous platform event messages, you can easily check whether any flows are triggered by the object or platform event.

IN THIS SECTION:

[View All Triggering Objects and Platform Events for Triggered Flows](#)

The new Triggered Flows list view shows the object or platform event that triggers each flow. Previously, you opened a flow in Flow Builder to view the triggering object or platform event. Now, before you save or delete a batch of records, you can quickly check whether your changes trigger a flow. You can add the new Triggering Object or Platform Event Label column to an editable list view on the Flows page in Setup.

[Analyze Flow Execution Events in Event Monitoring](#)

Use the new Flow Execution event type in Event Monitoring to analyze trends in usage of your flows and troubleshoot performance issues more efficiently.

[Send Email Notifications for Every Automated Field Update](#)

Send email notifications each time a workflow rule, process, or Apex trigger updates the same record that triggered the automation. When you choose to notify users after operations, such as assigning a task, configure the new process automation setting to send the email notifications. Previously, a workflow rule, process, or Apex trigger suppressed email notifications for updates to the same record that triggered the automation. A previously released update required that you contact Salesforce Customer Support to stop suppressing email notifications. You can now use this new setting to stop suppressing email notifications.

[Run Optimizer to Get Recommendations for Migrating Your Workflow Rules to Flows](#)

We updated the Salesforce Optimizer app to help you move from using workflow rules to using Flow Builder, the application that automates complex business processes. Optimize your implementation by reviewing workflow limits and deleting inactive workflow rules and validation rules. We updated these functions: Migrating Workflow Rules to Flow Builder, Active Workflow Rule Limits, Inactive Workflow Rules, and Inactive Validation Rules.

[Run Flows Permission is Being Removed](#)

We're retiring the Run Flows permission in Experience Cloud sites to provide a more detailed permission structure and improve flow security. Starting in Winter '21, the permission is no longer available in new orgs. Run Flows will be removed from all orgs in the Summer '22 release.

[Field Values for Interview Status Are Paused for Paused Flow Interviews](#)

The value for the Interview Status field on the FlowInterview object and custom flow interview list views is now Paused for all paused flow interviews. Previously, the value was null for flow interviews that were paused before Summer '21.

[Platform Events Maximum Batch Size Is 200](#)

Now the maximum batch size for platform events across all API versions is always 200. The batch size is the maximum number of event messages that can be sent to a trigger in one execution. Previously, the maximum batch size of flows and processes that subscribe to platform events was 2,000. That size wasn't ideal because it can result in limits being easily exceeded.

[Multi-Select Picklist Screen Component Values No Longer Include an Extra Space](#)

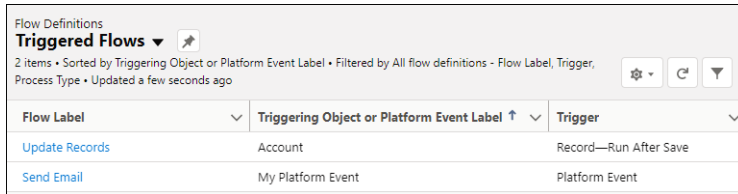
Now when more than one value in a Multi-Select Picklist screen component is selected at run time, the displayed values don't include an extra space, for example, def;xyz. Previously, the displayed values included an extra space, for example, def; xyz.

View All Triggering Objects and Platform Events for Triggered Flows

The new Triggered Flows list view shows the object or platform event that triggers each flow. Previously, you opened a flow in Flow Builder to view the triggering object or platform event. Now, before you save or delete a batch of records, you can quickly check whether your changes trigger a flow. You can add the new Triggering Object or Platform Event Label column to an editable list view on the Flows page in Setup.

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

Why: For example, before you import 100 new accounts, view the Triggered Flows list view to see whether creating accounts triggers a flow.



Flow Label	Triggering Object or Platform Event Label	Trigger
Update Records	Account	Record—Run After Save
Send Email	My Platform Event	Platform Event

How: To access the Triggered Flows list view and Triggering Object or Platform Event Label column, enable this process automation setting: **In Lightning Experience, use the enhanced Flows page and separate Paused and Scheduled Automations page.**

Analyze Flow Execution Events in Event Monitoring

Use the new Flow Execution event type in Event Monitoring to analyze trends in usage of your flows and troubleshoot performance issues more efficiently.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This event type is available in API version 53.0 and later but not in the Event Monitoring Analytics app.

Who: To access the Flow Execution event type in Event Monitoring, you need the Salesforce Shield or Salesforce Event Monitoring add-on subscription.

SEE ALSO:

[Analyze Your Flows in the Flow Execution Event Type](#)

Send Email Notifications for Every Automated Field Update

Send email notifications each time a workflow rule, process, or Apex trigger updates the same record that triggered the automation. When you choose to notify users after operations, such as assigning a task, configure the new process automation setting to send the email notifications. Previously, a workflow rule, process, or Apex trigger suppressed email notifications for updates to the same record that triggered the automation. A previously released update required that you contact Salesforce Customer Support to stop suppressing email notifications. You can now use this new setting to stop suppressing email notifications.

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

Why: Consider these examples.

- You create a user and choose to welcome the user by email.
- You create a task and choose to notify the task owner by email.
- You create an assignment rule and choose to notify users when they've been assigned a case.

How: From Setup, enter *process* in the Quick Find box, and then select **Process Automation Settings**. Select **Send an email each time automation updates the same record**.

SEE ALSO:

[Salesforce Winter '21 Release Notes: Stop Automated Field Updates from Suppressing Email Notifications \(Previously Released Update\)](#)

Run Optimizer to Get Recommendations for Migrating Your Workflow Rules to Flows

We updated the Salesforce Optimizer app to help you move from using workflow rules to using Flow Builder, the application that automates complex business processes. Optimize your implementation by reviewing workflow limits and deleting inactive workflow rules and validation rules. We updated these functions: Migrating Workflow Rules to Flow Builder, Active Workflow Rule Limits, Inactive Workflow Rules, and Inactive Validation Rules.

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

Run Flows Permission is Being Removed

We're retiring the Run Flows permission in Experience Cloud sites to provide a more detailed permission structure and improve flow security. Starting in Winter '21, the permission is no longer available in new orgs. Run Flows will be removed from all orgs in the Summer '22 release.

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:

[Bid Farewell to Run Flows for Guest Users](#)

Field Values for Interview Status Are Paused for Paused Flow Interviews

The value for the Interview Status field on the FlowInterview object and custom flow interview list views is now Paused for all paused flow interviews. Previously, the value was null for flow interviews that were paused before Summer '21.

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

Platform Events Maximum Batch Size Is 200

Now the maximum batch size for platform events across all API versions is always 200. The batch size is the maximum number of event messages that can be sent to a trigger in one execution. Previously, the maximum batch size of flows and processes that subscribe to platform events was 2,000. That size wasn't ideal because it can result in limits being easily exceeded.

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

Multi-Select Picklist Screen Component Values No Longer Include an Extra Space

Now when more than one value in a Multi-Select Picklist screen component is selected at run time, the displayed values don't include an extra space, for example, def;xyz. Previously, the displayed values included an extra space, for example, def; xyz.

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

Flow Extensions

Custom property editors now support action and screen component inputs that have record and Apex-defined data types. Use External Services with MuleSoft Anypoint Platform APIs to quickly generate invocable actions for flows. Elevate the intelligence of your flows with predictions, predictive factors, and improvement recommendations from Einstein Discovery actions.

IN THIS SECTION:

[Configure Flow Screen Components and Actions That Have Record and Apex-Defined Inputs](#)

Developers can now create a custom property editor that enables you to provide an input value for a record data type or Apex-defined data type. Previously, you provided input values only for primitive data types such as String and Number. Collections of record and Apex-defined data types are also supported.

[Generate Actions for Flow Builder from External Services for MuleSoft \(Generally Available\)](#)

Import your MuleSoft Anypoint Platform APIs in a few clicks with External Services for MuleSoft. Every endpoint is then converted into an action within your organization and immediately available in Flow Builder.

[Associate Errors with the Right Lightning Components for Screen Readers](#)

You can now associate a custom component's error element with an input component. When you build a new custom component for a flow, set an ID for the error element so that a screen reader can read the error message text that describes the custom component. For example, you're building a custom component that searches through a to-do list. You want to make sure that screen readers properly associate errors with the to-do list component.

[Make Custom Screen Components React to Other Components on the Same Flow Screen \(Pilot\)](#)

Design a flow screen with custom screen components that respond to updates on the same screen, and reduce the number of screens for a user to navigate through. Previously, you placed these components on separate screens.

[Get Insights and Intelligence in Your Flows](#)

As new actions in Flow Builder, Einstein Discovery predictions provide prescriptive intelligence that augment the decisions and other logic in your flows.

[Manage High Velocity Sales Cadence Targets in Your Flows](#)

Use actions in Flow Builder to manage sales cadence targets.

Configure Flow Screen Components and Actions That Have Record and Apex-Defined Inputs

Developers can now create a custom property editor that enables you to provide an input value for a record data type or Apex-defined data type. Previously, you provided input values only for primitive data types such as String and Number. Collections of record and Apex-defined data types are also supported.

Where: This change applies to Lightning web components in Lightning Experience.

SEE ALSO:

[Create Custom Property Editors That Use Literal Values for Complex Data Inputs](#)

Generate Actions for Flow Builder from External Services for MuleSoft (Generally Available)

Import your MuleSoft Anypoint Platform APIs in a few clicks with External Services for MuleSoft. 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.

Who: To use External Services for MuleSoft, you need a valid MuleSoft license or demo account.

SEE ALSO:

[Use External Services for MuleSoft to Generate Actions \(Generally Available\)](#)

Associate Errors with the Right Lightning Components for Screen Readers

You can now associate a custom component's error element with an input component. When you build a new custom component for a flow, set an ID for the error element so that a screen reader can read the error message text that describes the custom component. For example, you're building a custom component that searches through a to-do list. You want to make sure that screen readers properly associate errors with the to-do list component.

Where: This change applies to Lightning Experience and Salesforce Classic for flow screens that are rendered in Lightning runtime. Developing a custom Lightning web component is available in Enterprise, Performance, Unlimited, and Developer editions. Developing an Aura component is available in sandboxes and in Enterprise, Performance, Unlimited, and Developer editions.

How: Develop a custom component with input validation so that it lets the flow know whether the component is valid. If the custom component is invalid, the flow displays an error message below the custom component. The flow passes the ID of the element that displays the error message to a property called `ariaDescribedBy` in the custom component. The component receives the updated `ariaDescribedBy` property and assigns the ID to the appropriate input component that has its own `ariaDescribedBy` property. As a result, the error gets associated with the custom component's input property.

SEE ALSO:

[Salesforce Help: Lightning Runtime vs. Classic Runtime for Flows \(can be outdated or unavailable during release preview\)](#)

Make Custom Screen Components React to Other Components on the Same Flow Screen (Pilot)

Design a flow screen with custom screen components that respond to updates on the same screen, and reduce the number of screens for a user to navigate through. Previously, you placed these components on separate screens.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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.

Why: For example, you design a flow screen where a user searches for a knowledge article. As they enter a Text component, a custom Knowledge Article Search component searches with that text input value and returns the search results on the same screen. Another example is a component that uses numerical values and performs a calculation within the same screen.

How: Add these components to a flow screen.

- Add a standard input component like a text or a number, or add a custom component with an output attribute.
- Add a custom component that responds to any changes made to the first component by setting its inputs to the output of the first component. To follow the earlier example, set the Knowledge Article Search component's query input to the output of the Text component.

Get Insights and Intelligence in Your Flows

As new actions in Flow Builder, Einstein Discovery predictions provide prescriptive intelligence that augment the decisions and other logic in your flows.

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

Who: A valid Tableau CRM license is required to use Einstein Discovery.

SEE ALSO:

[Add Einstein Discovery Insights to Your Flows](#)

Manage High Velocity Sales Cadence Targets in Your Flows

Use actions in Flow Builder to manage sales cadence targets.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited Editions. High Velocity Sales is available for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: A valid High Velocity Sales license is required to use High Velocity Sales actions.

SEE ALSO:

[New and Changed Invocable Actions in High Velocity Sales](#)

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

[Accurately Measure the CPU Time Consumption of Flows and Processes \(Release Update\)](#)

This update lets Salesforce accurately measure, log, and limit the CPU time consumed by flows and processes. 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. This update was first made available in Spring '21.

[Analyze Screen Flow Usage \(Release Update\)](#)

With this update, you can use reports to examine run-time details about your screen flows. Use these metrics to discover usage patterns and in turn to optimize your screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows. This update was first made available in Spring '21.

[Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas \(Release Update\)](#)

This update enables process and flow formulas to reference a record's field when the field is accessed via a null lookup relationship field or null record variable. Now process and flow formulas can return null values when the calculations involve a null record variable or null lookup relationship field. This update was first made available in Spring '19. 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 Winter '22. In Spring '21, Salesforce enabled the test run option for this update because of a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Winter '22.

[Disable Rules for Enforcing Explicit Access to Apex Classes \(Release Update\)](#)

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22.

[Evaluate Criteria Based on Original Record Values in Process Builder \(Release Update\)](#)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. 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. This update was first made available in Summer '19.

[Make Paused Flow Interviews Resume in the Same Context with the Same User Access \(Release Update\)](#)

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 was first made available in Winter '21 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Summer '22.

Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)

This update lets Salesforce accurately measure, log, and limit the CPU time consumed by flows and processes. 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. This update was first made available in Spring '21.

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 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: Salesforce accurately measures, logs, and limits the CPU time consumed by flows and processes that are configured to run in API version 51.0 or later. With this update enabled, the behavior applies to all flows and processes, regardless of their run-time API versions.

Previously, the CPU time consumed was occasionally incorrect or misattributed to other automation occurring later in the transaction, such as Apex triggers. With this update enabled, you can properly identify performance bottlenecks that cause the maximum per-transaction CPU time consumption limit to be exceeded.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Accurately Measure the CPU Time Consumption of Flows and Processes release update, follow the testing and activation steps.

Flows and processes fail if they cause a transaction to exceed the CPU time limit, and complex flows and processes are more likely to exceed this limit. To decrease the CPU time usage of a flow or process, reduce the number of elements, formulas, and cross-object references. You can check the debug logs to see how much CPU time is taken by each element, criteria node, and action.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

Analyze Screen Flow Usage (Release Update)

With this update, you can use reports to examine run-time details about your screen flows. Use these metrics to discover usage patterns and in turn to optimize your screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows. This update was first made available in Spring '21.

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.

Review the Sample Flow Report: Screen Flows report or your own custom report to discover usage metrics for your screen flows. The screen flow metrics can help you identify and improve the usability of screens that take users an unnecessarily long time to complete.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Analyze Screen Flow Usage release update, follow the testing and activation steps.

As users run and navigate through screen flows, their usage data is collected and becomes available in the Sample Flow Report: Screen Flows report. Run the report and confirm that it contains data from your screen flows.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

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

This update enables process and flow formulas to reference a record's field when the field is accessed via a null lookup relationship field or null record variable. Now process and flow formulas can return null values when the calculations involve a null record variable or null lookup relationship field. This update was first made available in Spring '19. 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 Winter '22. In Spring '21, Salesforce enabled the test run option for this update because of a known issue with the scheduled enforcement. You can still disable the test run until the 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: 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.

How: To test this critical update, we recommend working in a sandbox. Test all process and flow formulas that reference lookup relationship fields or record variable fields. Processes have formulas in criteria and in actions. Flows have formulas in resources and in validation of input components.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

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

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22.

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

When: This update is postponed to 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.

Who: This update is available only for Salesforce orgs that enabled the Require User Access to Apex Classes Invoked by Flow update.

If you enabled the Require User Access to Apex Classes Invoked by Flow update, 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. User access was never restricted for legacy Apex actions.
- 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, 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.
- Override the default user access for your flows. By default, users can run a flow if they have the Flow User feature license, the Run Flows permission, or the Manage Flow permission. For each flow, we recommend that you override that default behavior and restrict access to enabled profiles or permission sets.

For example, to prevent unauthenticated guest users in Experience Cloud sites from running a flow, restrict the flow's user access to enabled profiles or permission sets. Then grant access to the appropriate users by enabling the specific profiles or permission sets.



Note: For detailed instructions for the preparation steps, see this Knowledge Article: [Prepare for the "Disable Rules for Enforcing Explicit Access to Apex Classes" Release Update](#).

The preparation steps are recommended as security best practices. But they're not required, and enabling the Disable Rules for Enforcing Explicit Access to Apex Classes update doesn't impact existing implementations. For example, users' permission sets and profiles can continue to grant them explicit access to Apex classes.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Disable Rules for Enforcing Explicit Access to Apex Classes, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. 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. This update was first made available in Summer '19.

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 Summer '23. 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 then 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 can cause the process to behave differently.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Release 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 was first made available in Winter '21 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Summer '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 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 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 that 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 that 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 then select **Release Updates**. For Make Paused Flow Interviews Resume in the Same Context with the Same User Access, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Flow and Process Release Updates](#)

Flow and Process Run-Time Improvements in API Version 53.0

These updates affect only flows and processes that are configured to run on API version 53.0 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.

Get Date Without Time Values from Date Objects

Previously, when a flow ran as an invocable action via REST API, date type output variables returned strings with both date and time. Now those values contain a date in the YYYY-MM-DD" format without the time component.

Reset Screen Components to Admin-Configured Defaults When Making Hidden Components Visible

When a user navigates back to a screen where a component was hidden and makes the component visible, the component now resets to use the admin-configured input values. This change applies to most standard components, including Toggle, Dependent Picklist, Lookup, Email, Name, Address, Phone, URL, and File Upload, and all custom components.

In API version 52.0 and earlier, the hidden component on the previous screen would sometimes not work as expected or show an error message. This issue occurred after the user navigated back to that screen and interacted with other components that made the hidden component visible.

For example, when a Toggle component was made visible again, the component reverted to the default labels defined in the underlying component. The labels changed to Toggle, Active, and Inactive rather than the default labels set by the admin. When a Dependent Picklist component was made visible again, the component rendered as a blank picklist with no inputs and showed an error message.

Specify the default workflow user to run schedule-triggered flows

Now you can specify the default workflow user in your org's process automation settings to run schedule-triggered flows. Previously, the Automated Process user ran schedule-triggered flows. If you don't specify the default workflow user to run schedule-triggered flows, the Automated Process user runs them by default instead.

Correctly evaluate the true and false global constants in conditions in some elements

When you select the `{!$GlobalConstant.True}` value for a text field in a condition in the Start, Update Records, Get Records, or Delete Records elements of a flow, a string value of true is returned. When you select the `{!$GlobalConstant.False}` value in the same scenarios, a string value of false is returned. Previously, these conditions returned null values at run time.

Einstein Next Best Action

Use Einstein Next Best Action to automatically show recommendations and flow actions to your users. You can now build recommendation strategies using the actions and logic capabilities of Flow Builder (pilot).

IN THIS SECTION:

[Build Einstein Next Best Action Strategies in Flow Builder \(Pilot\)](#)

Sort collections and assign data into recommendations while taking advantage of Flow Builder's features and structure.

[Show Flow-Driven Recommendations on Lightning App Pages \(Pilot\)](#)

After building a recommendation strategy in Flow Builder, display that strategy's recommendations on Lightning app pages. Just as you would with a strategy built in Strategy Builder, add an Einstein Next Best Action component to each Lightning app page, but specify Flow Builder as the strategy source.

Build Einstein Next Best Action Strategies in Flow Builder (Pilot)

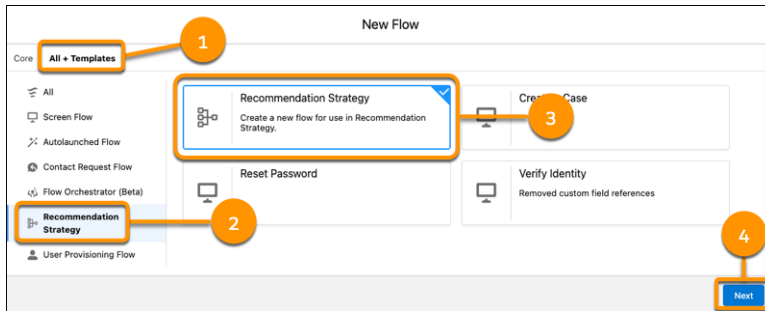
Sort collections and assign data into recommendations while taking advantage of Flow Builder's features and structure.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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.

How: If you're interested in participating in the pilot program, ask your Salesforce account executive.

To create a strategy in Flow Builder, go to the Flows page in Setup and click **New Flow**.



Select the **All + Templates** tab (1), then select the **Recommendation Strategy** category (2). Select the **Recommendation Strategy** flow type (3), then click **Next** (4).

When building a recommendation strategy, use the Get Records element to add your recommendations to the outputRecommendations collection variable. Lightning app pages only show recommendations that are in outputRecommendations.

Use the Collection Sort element the same way you use the Sort element in Strategy Builder. You can also use the Recommendation Assignment element in place of Strategy Builder's Map element. And keep in mind that in Flow Builder, all elements are executed in the order they're connected. Strategy Builder's multiple-branch logic isn't supported in Flow Builder.

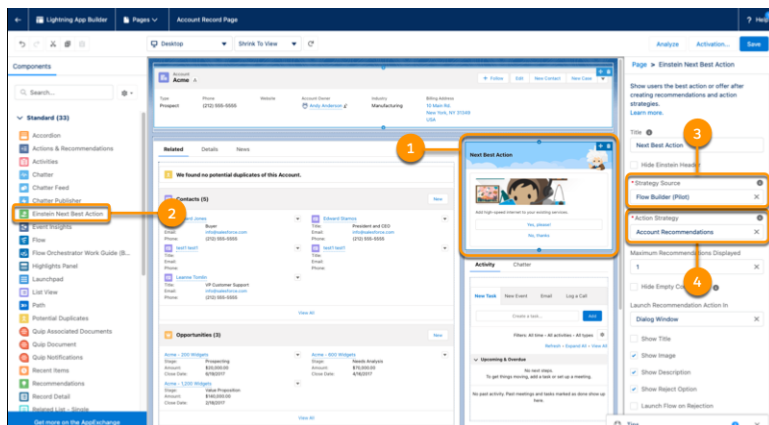
Show Flow-Driven Recommendations on Lightning App Pages (Pilot)

After building a recommendation strategy in Flow Builder, display that strategy's recommendations on Lightning app pages. Just as you would with a strategy built in Strategy Builder, add an Einstein Next Best Action component to each Lightning app page, but specify Flow Builder as the strategy source.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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.

How: To use a recommendation strategy to display recommendations on a Lightning app page, first create or edit a Lightning app page in Lightning App Builder.



In Lightning App Builder, select an existing Einstein Next Best Action component (1) or add a new one (2). Change the **Strategy Source** (3) to Flow Builder (Pilot), then select your recommendation strategy in **Action Strategy** (4). Save your work.

If the page isn't already active, click **Activation** and select an activation option for the page.

Einstein Recommendation Builder

Explore ways to build recommendations with Try Einstein. Build recommendations for managed packages with Einstein Recommendation Builder.

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

SEE ALSO:

[Einstein Recommendation Builder](#)

Experience Cloud

Use our new Microsite template, which is based on the Lightning Web Runtime (LWR), to capture user data and create leads without the overhead of developing a complete website. Archive sites that outlived their usefulness and free up space to create the sites you need. Optimize your site performance with several content delivery network (CDN) enhancements. And build LWR sites more quickly with several new drag-and-drop components.



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, 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 that run on Aura, such as Customer Service, Partner Central, and Customer Account Portal.
- *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 THIS SECTION:

[Capture Leads and Deliver Fresh Content with the Microsite Template](#)

Enjoy the flexibility to create a site and deploy it to customers without the bulk of a full website. The new Microsite template showcases best practices and gives you a new way to use Experience Cloud's latest technology. With the ability to gather user data and create leads directly from your site, opportunities are easy to track.

[Archive Experience Cloud Sites \(Closed Beta\)](#)

We heard you loud and clear: You want a way to archive a site in Salesforce after it has outlived its usefulness for your business needs. To archive an inactive site, use the **Archive Site** button on your site's detail page (accessed through the Salesforce CMS app). Don't worry, though. If you change your mind, you can always unarchive it. When a site is archived, its URL is unavailable to all users, including admins. Instead, users see a Site under maintenance page. You can archive up to 100 sites, and archived sites don't count against your Salesforce limit of 100 sites.

[Experience Builder Sites](#)

Customize the look of buttons and forms in LWR sites with additional branding properties. Set the default language in your LWR sites. And to maintain SEO equity, add URL redirects within your LWR and Aura sites.

[Components in Experience Builder](#)

Take advantage of several new drag-and-drop components for LWR sites.

[Developer Productivity](#)

Develop sites and custom components more efficiently with support for expression language and `@salesforce` scoped modules.

[Performance](#)

Optimize your site performance by using enhanced domains and enforcing only single certificates to serve your domain. Support high-traffic sites during self-registration.

[Security and Sharing](#)

Hide more personal information fields with a new user setting, retain guest users' access to products, and give more granular access to flows.

[Other Changes](#)

Learn about additional Experience Cloud improvements.

Capture Leads and Deliver Fresh Content with the Microsite Template

Enjoy the flexibility to create a site and deploy it to customers without the bulk of a full website. The new Microsite template showcases best practices and gives you a new way to use Experience Cloud's latest technology. With the ability to gather user data and create leads directly from your site, opportunities are easy to track.

Where: This change applies to LWR sites using the Microsite template, accessed through Lightning Experience and Salesforce Classic. The template is available when you [purchase Salesforce CMS](#) in Enterprise, Performance, Unlimited, and Developer editions.

Why: Gather user information from your site and store it directly in the Salesforce Leads object using the new Lead Form component. Using the power of Lightning Web Runtime (LWR), microsites provide enhanced page performance and Lightning components that are easier for your developers to customize. New components include:

- Lead Form
- Header
- Banner
- Tile
- Image
- Video

- Text
- Button
- Horizontal Line

SEE ALSO:

[Make Cross-Cloud Connections with the Marketing Cloud Form Component \(Pilot\)](#)

Archive Experience Cloud Sites (Closed Beta)

We heard you loud and clear: You want a way to archive a site in Salesforce after it has outlived its usefulness for your business needs. To archive an inactive site, use the **Archive Site** button on your site's detail page (accessed through the Salesforce CMS app). Don't worry, though. If you change your mind, you can always unarchive it. When a site is archived, its URL is unavailable to all users, including admins. Instead, users see a Site under maintenance page. You can archive up to 100 sites, and archived sites don't count against your Salesforce limit of 100 sites.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.



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](#).

How: Contact Salesforce Customer Support to enable the Archive Site feature. After it's enabled in your org, access your site's detail page from **App Launcher** > **Salesforce CMS** > **CMS Experiences** after turning on CMS-related tabs for your profile.

SEE ALSO:

[Salesforce Help: Start Using Salesforce CMS](#)

Experience Builder Sites

Customize the look of buttons and forms in LWR sites with additional branding properties. Set the default language in your LWR sites. And to maintain SEO equity, add URL redirects within your LWR and Aura sites.

IN THIS SECTION:

[Redirect Users Within an Experience Cloud Site](#)

Redirect users to URLs within the same Experience Cloud site to retain the discoverability and SEO equity of your web pages.

[Fine-Tune Your LWR Sites with New Branding Properties](#)

Customize the size and shape of the buttons and input fields on your LWR site. Specify the color of individual elements, such as headings, body text, links, buttons, and input fields. On the reorganized Site Spacing tab, you can more easily adjust the space above, below, and between section components on your desktop and mobile sites.

[Set the Default Language in LWR Sites](#)

Now you can set your LWR site's default language to any language that Experience Cloud supports. Previously, LWR sites supported only English (US).

[Use Lightning Message Service in Aura and LWR Site Pages \(Generally Available\)](#)

Communicate across the DOM within an Aura or LWR site page using Lightning Message Service. You can also communicate between Aura and Lightning web components.

[Automatically Complete Addresses in Aura Sites](#)

When customers and partners who use your Aura sites begin to enter an address on the site, it's completed using Google location services. The autocomplete option for Aura sites is enabled when you enable it in Salesforce.

[Differentiate Between the Build Your Own Templates for Aura and LWR Sites](#)

For clarity, the original Build Your Own template is now called Build Your Own (Aura). This rename makes it easier to distinguish between Aura and LWR when choosing a Build Your Own template in the site-creation wizard.

[Use Audiences as Criteria for Other Audiences](#)

Instead of recreating audience criteria, reuse an audience as criteria in another audience.

[Users Directed to Previous Page or Homepage After Deleting a Record in a Site](#)

If users delete a record, they're now directed to the page that they were on before they deleted the record, or they're directed to the site's homepage. Previously, they were directed to the record list.

[Paste Images in Chatter Posts and Comments](#)

Quickly add images to your Chatter posts and comments by copying and pasting them instead of saving them to a file and then uploading them.

[Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App](#)

Make the mobile publisher app navigation easier to use for iOS users by including both the hamburger menu and the back button in your site header.

Redirect Users Within an Experience Cloud Site

Redirect users to URLs within the same Experience Cloud site to retain 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: To set up URL redirects, add the source and target URLs to a CSV file that you can upload to your site's Experience Workspace. You can use the provided sample CSV template to add your URLs. The source URL is the Experience Cloud site page you want to direct your users away from. The target URL is the page in the same Experience Cloud site where you want to redirect your users to. For the source and target URLs, include everything after the domain name.

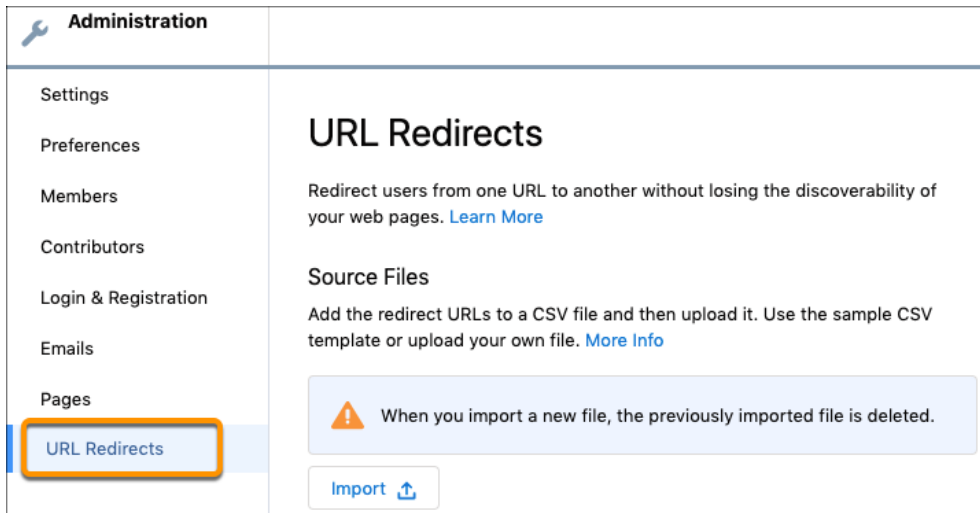
Sample CSV

```
/source, /target  
/TargetSite/s/account/001RM000005Su9JYAS/acme, /newaccount/001RM000005Su9JYAS/acme
```

To import the CSV file to your Experience Cloud site, select **Workspaces > Administration > URL Redirects > Import**.



Note: Importing a new CSV file overwrites the existing redirect file. To add URLs redirects without replacing existing redirect rules, first export your existing redirects as a CSV file. Add the new URLs to the file you downloaded, and then import the CSV file again.



SEE ALSO:

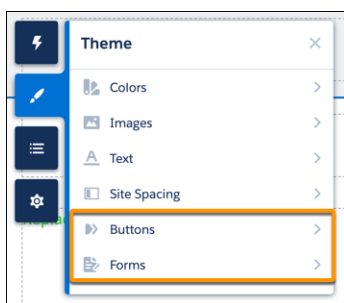
[Salesforce Help: Redirect Users to Your Experience Builder Sites \(can be outdated or unavailable during release preview\)](#)

Fine-Tune Your LWR Sites with New Branding Properties

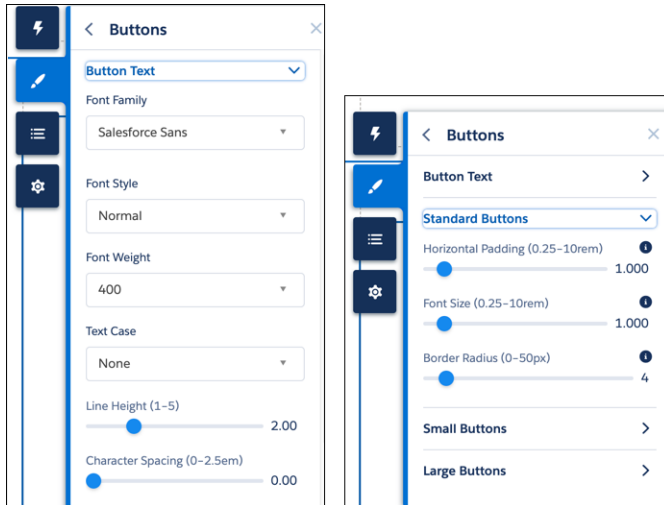
Customize the size and shape of the buttons and input fields on your LWR site. Specify the color of individual elements, such as headings, body text, links, buttons, and input fields. On the reorganized Site Spacing tab, you can more easily adjust the space above, below, and between section components on your desktop and mobile sites.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

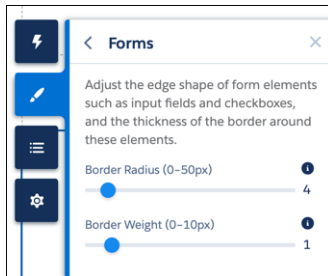
Why: The Theme panel in Experience Builder includes new selections for adjusting the branding properties of the buttons and forms on your site.



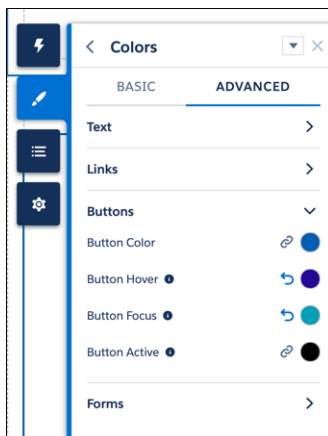
For buttons, adjust the appearance and size of the button text. You can also modify the width, font size, and edges of standard, small, and large buttons.



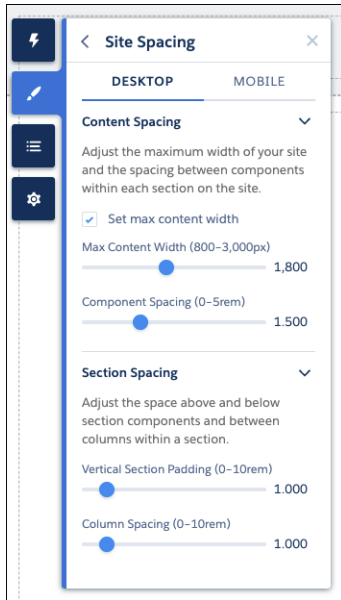
For forms, adjust how rounded the corners of your input fields are, and how heavy the border is around these fields.



Customize the colors for these elements and more on the new Advanced tab on the Colors panel. Text, heading, link, button, and form colors default to the customizations that you apply on the Basic tab. The hover color for links derives from the link color, and the colors for button hover, focus, and active states are based on the button color. You can override all these defaults to refine the branding color of each of these elements across your site.



The Site Spacing panel now organizes your customization options onto separate tabs for your desktop and mobile sites.



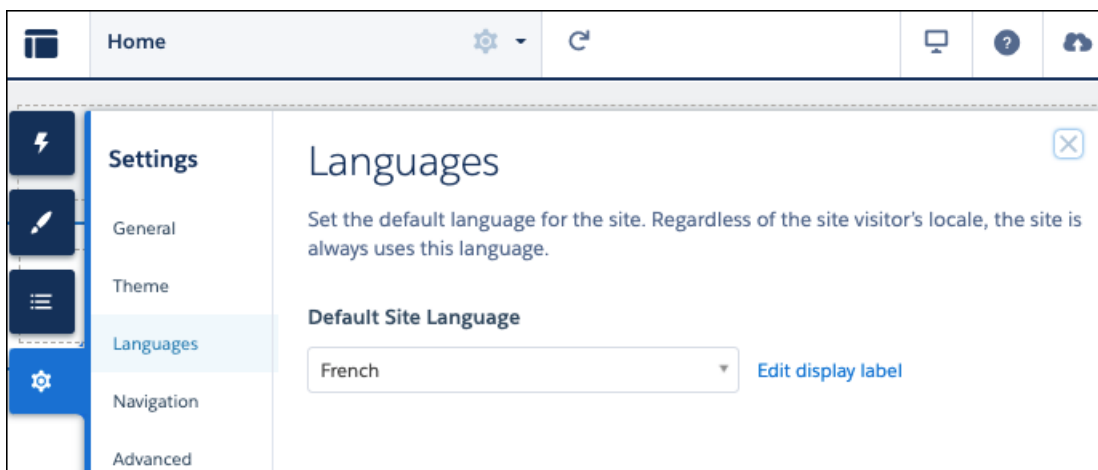
Tip: Each property in the Theme panel maps to `--dxp` styling hooks, which you can use when creating custom Lightning web components. When a user updates the branding property in the Theme panel, the system automatically updates any Lightning web components that use the hooks associated with that property.

Set the Default Language in LWR Sites

Now you can set your LWR site's default language to any language that Experience Cloud supports. Previously, LWR sites supported only English (US).

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: When you update the site's default language in **Settings > Languages** in Experience Builder, system and custom labels are updated with translations, if they exist in Translation Workbench.



 **Note:** LWR sites don't support right-to-left languages.

Use Lightning Message Service in Aura and LWR Site Pages (Generally Available)

Communicate across the DOM within an Aura or LWR site page using Lightning Message Service. You can also communicate between Aura and Lightning web components.

Where: This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Developer Documentation: Communicate Across the DOM with Lightning Message Service](#)

[Developer Documentation: Message Service](#)

Automatically Complete Addresses in Aura Sites

When customers and partners who use your Aura sites begin to enter an address on the site, it's completed using Google location services. The autocomplete option for Aura sites is enabled when you enable it in Salesforce.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Autocomplete on Standard Addresses](#)

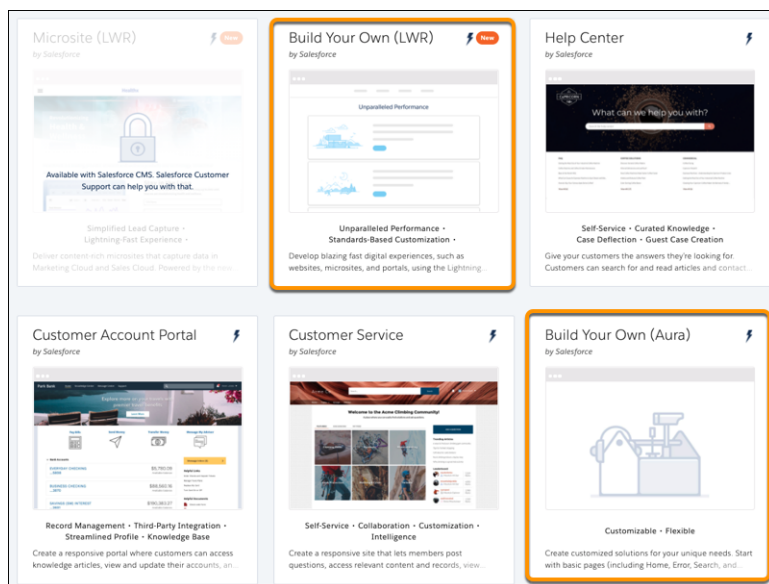
Differentiate Between the Build Your Own Templates for Aura and LWR Sites

For clarity, the original Build Your Own template is now called Build Your Own (Aura). This rename makes it easier to distinguish between Aura and LWR when choosing a Build Your Own template in the site-creation wizard.

Where: This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Select the template that suits your needs in the site creation wizard.

- Build Your Own (LWR) is powered by the Lightning Web Runtime (LWR) and based exclusively on the Lightning Web Components programming model. It includes drag-and-drop functionality and is suitable for anyone familiar with developing custom Lightning web components and working with Salesforce DX, User Interface API, and Apex.
- Build Your Own (Aura) is Aura-based and provides the basic pages that every Experience Cloud site requires. With drag-and-drop functionality, you can easily add more pages and components to customize the site.



Use Audiences as Criteria for Other Audiences

Instead of recreating audience criteria, reuse an audience as criteria in another audience.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

The screenshot shows the 'New Audience' configuration page. The 'Audience Name' is 'Silver Coffee Drinker NY and CA'. The 'Audience Criteria' section shows three conditions defined using existing audiences:

- Criteria Type: User > Profile > Name, Operator: equals, Value: Enter Value... (Coffee Drinker X)
- Criteria Type: AND, Audience, Operator: equals, Value: Enter Value... (Silver Partners - NY X)
- Criteria Type: AND, Audience, Operator: equals, Value: Enter Value... (Silver Partners - CA X)

Buttons for '+ Add Condition', 'Cancel', and 'Save' are visible at the bottom.

Users Directed to Previous Page or Homepage After Deleting a Record in a Site

If users delete a record, they're now directed to the page that they were on before they deleted the record, or they're directed to the site's homepage. Previously, they were directed to the record list.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Paste Images in Chatter Posts and Comments

Quickly add images to your Chatter posts and comments by copying and pasting them instead of saving them to a file and then uploading them.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[IdeaExchange: Screenshot in Chatter \(partially delivered\)](#)

Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App

Make the mobile publisher app navigation easier to use for iOS users by including both the hamburger menu and the back button in your site header.

Where: This change applies to iOS Mobile Publisher Apps in Enterprise, Performance, Unlimited, and Developer editions.

Components in Experience Builder

Take advantage of several new drag-and-drop components for LWR sites.

IN THIS SECTION:

[Add Content to LWR Sites with New Components](#)

Create pixel-perfect sites, populated with content from Salesforce CMS and other data sources, with new Lightning web components for your LWR sites. Look for these new components in Experience Builder: Banner, Button, Horizontal Line, Image, Text Block, Tile, and Video.

[Dynamically Add Content to Your LWR Sites with Data Binding in LWC Components](#)

Use data binding to quickly select content to dynamically populate your LWR sites. Save your content one time and use it anywhere. Create content that matches your branding and messaging, save it in your Salesforce CMS, and then use it on any LWR site. Use the Banner or Tile components to automatically populate content from Salesforce CMS.

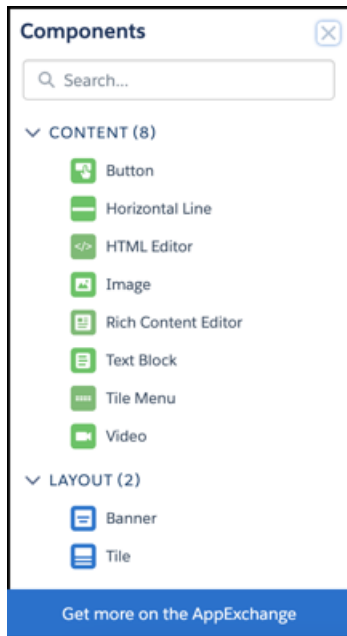
[Make Cross-Cloud Connections with the Marketing Cloud Form Component \(Pilot\)](#)

Experience Cloud and Marketing Cloud make a great team. With the new Marketing Cloud Form, you can use your microsites to capture visitor information and send it directly to Marketing Cloud. Spin up a new site, and use the Marketing Cloud Form component to create Marketing Cloud data extensions and collect contacts that can be stored directly in Marketing Cloud.

Add Content to LWR Sites with New Components

Create pixel-perfect sites, populated with content from Salesforce CMS and other data sources, with new Lightning web components for your LWR sites. Look for these new components in Experience Builder: Banner, Button, Horizontal Line, Image, Text Block, Tile, and Video.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.



Dynamically Add Content to Your LWR Sites with Data Binding in LWC Components

Use data binding to quickly select content to dynamically populate your LWR sites. Save your content one time and use it anywhere. Create content that matches your branding and messaging, save it in your Salesforce CMS, and then use it on any LWR site. Use the Banner or Tile components to automatically populate content from Salesforce CMS.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

How: On the property panel of the Banner or Tile components, select data from content saved in Salesforce CMS. Use the fields in the component's property editor to map content from CMS to the component.

You can even nest components within one another. The nested component inherits content from the parent component

Note:

- The HTML Editor, Image, Text Block, Video, and Button components don't support direct data binding (in that they don't have a Select Content button in the properties), but you can nest them in other data-bound components and CMS or CRM detail pages. The nested component inherits the content from the data-bound component in which it's nested.
- Data binding isn't supported with *ExperienceBundle*.

Make Cross-Cloud Connections with the Marketing Cloud Form Component (Pilot)

Experience Cloud and Marketing Cloud make a great team. With the new Marketing Cloud Form, you can use your microsites to capture visitor information and send it directly to Marketing Cloud. Spin up a new site, and use the Marketing Cloud Form component to create Marketing Cloud data extensions and collect contacts that can be stored directly in Marketing Cloud.

Where: This change applies to LWR sites using the Microsite template, accessed through Lightning Experience and Salesforce Classic. The template is available when you [purchase Salesforce CMS](#) 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.

[Connect REST API](#) and [Connect in Apex](#) support Marketing Cloud Forms.

SEE ALSO:

[Capture Leads and Deliver Fresh Content with the Microsite Template](#)

Developer Productivity

Develop sites and custom components more efficiently with support for expression language and `@salesforce` scoped modules.

IN THIS SECTION:

[Use Expression Language with Data Binding in LWR Sites](#)

Use the following expressions in Experience Builder when working with LWR sites: `{!Item.fieldName}` to get a field's value in data-bound contexts, `{!Route.param}` to get a query or route parameter from the URL, and `{!Site.basePath}` to resolve the `basePath` of the LWR site. Anything inside the `{! }` delimiters is evaluated and dynamically replaced when the component is rendered.

[Page References Now Support External Record Routes](#)

The `PageReference` object, which generates a unique URL format and defines attributes that apply to all pages of that type, now supports External Record Pages (for CMS Connect) and External Record Relationship Pages (for Quip Related List pages).

[Set Up Tab Bar Navigation for Mobile Publisher Apps in ExperienceBundle](#)

Do you prefer to work in the API? Starting in Winter '22, you can programmatically set up the tab bar navigation for mobile publisher apps in the ExperienceBundle metadata type.

[Incorporate User-Authorized Cookie Consent into Your Sites](#)

Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your Lightning web components. Users can allow one or more specific cookie types: Required, Marketing, Preference, and Statistics.

[Use the `@salesforce/apexContinuation` Scoped Module in LWR Sites](#)

The `@salesforce/apexContinuation` scoped module, which lets you import Apex methods that can return a continuation in custom Lightning web components, is now supported in LWR sites.

Use Expression Language with Data Binding in LWR Sites

Use the following expressions in Experience Builder when working with LWR sites: `{!Item.fieldName}` to get a field's value in data-bound contexts, `{!Route.param}` to get a query or route parameter from the URL, and `{!Site.basePath}` to resolve the `basePath` of the LWR site. Anything inside the `{! }` delimiters is evaluated and dynamically replaced when the component is rendered.

Where: This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature.

Page References Now Support External Record Routes

The `PageReference` object, which generates a unique URL format and defines attributes that apply to all pages of that type, now supports External Record Pages (for CMS Connect) and External Record Relationship Pages (for Quip Related List pages).

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Set Up Tab Bar Navigation for Mobile Publisher Apps in ExperienceBundle

Do you prefer to work in the API? Starting in Winter '22, you can programmatically set up the tab bar navigation for mobile publisher apps in the ExperienceBundle metadata type.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Incorporate User-Authorized Cookie Consent into Your Sites

Use the `lightning/userConsentCookie` module to incorporate user-authorized cookie consent into your Lightning web components. Users can allow one or more specific cookie types: Required, Marketing, Preference, and Statistics.

Where: This change applies to Lightning web components used in [LWR and Aura sites](#), accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Add User-Authorized Cookie Consent to Your Lightning Web Components](#)

Use the `@salesforce/apexContinuation` Scoped Module in LWR Sites

The `@salesforce/apexContinuation` scoped module, which lets you import Apex methods that can return a continuation in custom Lightning web components, is now supported in LWR sites.

Where: This change applies to Lightning web components used in [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Performance

Optimize your site performance by using enhanced domains and enforcing only single certificates to serve your domain. Support high-traffic sites during self-registration.

IN THIS SECTION:

[Automatically Get CDN for Digital Experiences](#)

The content delivery network (CDN) for Digital Experiences ensures top-level performance at peak traffic levels, allowing your site to scale to meet the demands of your business. All orgs that are using enhanced domains now automatically use Salesforce's included CDN for Digital Experiences.

[Use Single Certificates with the CDN for Digital Experiences](#)

Keep brands separate and ensure site safety by serving your site domain with a single certificate. Shared domain certificates are no longer available for new sites using the CDN for Digital Experiences.

[Improve Self-Registration Performance for High-Scale Sites \(Pilot\)](#)

Large-scale business-to-consumer experiences often involve higher than usual registration traffic. Improve the performance of high-traffic sites during self-registration using bulk processing, with minimal coding required. Instead of processing requests one at a time, they're accumulated into batches and processed in bulk asynchronously. After users are successfully processed, they receive a welcome email, along with information to complete the registration.

[Get Improved Self-Registration Performance with Account Role Optimization](#)

We improved the self-registration process for orgs using account role optimization for their high-traffic sites. The registration process is now 10 times faster than before.

[Use the Customizable Service Not Available Page for LWR and Aura Sites](#)

Maintain business continuity when your site is down regardless of which template you're using. The Service Not Available page is available to orgs that have enabled the content delivery network with a custom URL for their Digital Experiences. The page is also included in packaged and exported sites.

[Load Pages Faster with HTML Document Caching in LWR Sites](#)

To improve page load times for LWR sites, HTML document caching is now enabled in orgs that use Salesforce's included CDN for Digital Experiences.

[Get Ready for Salesforce Edge Network for Custom Domains](#)

To deliver a consistent user experience regardless of a user's location, Salesforce is migrating custom domains that serve Experience Cloud sites to the Salesforce Edge Network infrastructure. Salesforce Edge Network routes requests to the closest Salesforce location where Salesforce Edge Network is deployed. This routing brings Salesforce services closer to the user on trusted Salesforce infrastructure.

Automatically Get CDN for Digital Experiences

The content delivery network (CDN) for Digital Experiences ensures top-level performance at peak traffic levels, allowing your site to scale to meet the demands of your business. All orgs that are using enhanced domains now automatically use Salesforce's included CDN for Digital Experiences.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

How: Enable Enhanced Domains for your org and automatically get Salesforce's CDN for Digital Experiences. When you enable Enhanced Domains, your Experience Cloud sites are served on <customer-defined>.my.site.com instead of <customer-defined>.force.com and the my.site.com domain is automatically enabled with the CDN for Digital Experiences.

Use Single Certificates with the CDN for Digital Experiences

Keep brands separate and ensure site safety by serving your site domain with a single certificate. Shared domain certificates are no longer available for new sites using the CDN for Digital Experiences.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

Improve Self-Registration Performance for High-Scale Sites (Pilot)

Large-scale business-to-consumer experiences often involve higher than usual registration traffic. Improve the performance of high-traffic sites during self-registration using bulk processing, with minimal coding required. Instead of processing requests one at a time, they're accumulated into batches and processed in bulk asynchronously. After users are successfully processed, they receive a welcome email, along with information to complete the registration.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.



Note: This feature isn't generally available and is being piloted with certain Customers subject to additional terms and conditions. It isn't 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.

How: Contact Salesforce Customer Support to participate in the High-Traffic Self-Registration pilot program.

Get Improved Self-Registration Performance with Account Role Optimization

We improved the self-registration process for orgs using account role optimization for their high-traffic sites. The registration process is now 10 times faster than before.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

Who: This feature is available to Experience Cloud license users who have enabled [account role optimization](#) for their org.

Use the Customizable Service Not Available Page for LWR and Aura Sites

Maintain business continuity when your site is down regardless of which template you're using. The Service Not Available page is available to orgs that have enabled the content delivery network with a custom URL for their Digital Experiences. The page is also included in packaged and exported sites.

Where: This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Load Pages Faster with HTML Document Caching in LWR Sites

To improve page load times for LWR sites, HTML document caching is now enabled in orgs that use Salesforce's included CDN for Digital Experiences.

Where: This change applies to Lightning web components used in [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Get Ready for Salesforce Edge Network for Custom Domains

To deliver a consistent user experience regardless of a user's location, Salesforce is migrating custom domains that serve Experience Cloud sites to the Salesforce Edge Network infrastructure. Salesforce Edge Network routes requests to the closest Salesforce location where Salesforce Edge Network is deployed. This routing brings Salesforce services closer to the user on trusted Salesforce infrastructure.

Where: This change applies to custom domains serving [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. It applies only to custom domains with the HTTPS option, "Salesforce serves the domain over HTTPS on Salesforce's servers using your HTTPS certificate."

When: Salesforce started migrating custom domains to Salesforce Edge Network in August 2021.

How: To determine whether your custom domain uses Salesforce Edge Network, look for references to edge when you view your custom domain's HTTP headers or resolve the domain name. For more information, see the knowledge article, "What is Salesforce Edge Network?"

If you use allowlists for Salesforce IP addresses and you allow only regional IP addresses, we recommend that you include our current IP ranges for regions where you have users. Including these IP ranges enables your users to connect to the closest available Salesforce data center where Salesforce Edge Network is deployed.

SEE ALSO:

[Knowledge Article: Salesforce IP Addresses and Domains to Allow](#)

[Knowledge Article: What is Salesforce Edge Network?](#)

[Salesforce Help: Salesforce Edge Network \(can be outdated or unavailable during release preview\)](#)

Security and Sharing

Hide more personal information fields with a new user setting, retain guest users' access to products, and give more granular access to flows.

IN THIS SECTION:

[Hide More Personal Information Fields](#)

Prevent external users, such as portal or partner users, from viewing personal information in your user records. Now when you apply the Enhanced Personal Information Management setting, Salesforce blocks view access to 20 fields that are considered personal information. This setting is also more flexible than the Hide Personal Information setting. To implement this setting, in User Management Settings, add or remove the PersonalInfo compliance category for any field.

[Create Sharing Rules to Retain and Control Guest Users' Product Access \(Release Update\)](#)

To better protect your Salesforce data, this update changes how unauthenticated guest access to product records is controlled. To prevent guest users from losing access to products, create and test guest user sharing rules. The Product org-wide sharing default for external users is no longer applied to guest users, and guest user access is set to Private. This setting can't be changed. This update was first made available in Winter '22.

[Bid Farewell to Run Flows for Guest Users](#)

The Run Flows permission for the Guest User and Experience Cloud External User profiles is no longer available in new orgs, starting in Winter '22. Without the Run Flows permission, you're free to use the more granular permission structure embedded in Flows and give your users the detailed access they need. Run Flows will be removed from all orgs in the Summer '22 release. To avoid future access issues, we recommend updating your existing sites to the new permission structure before the Summer '22 release.

[Removal of Guest User Access to Recognition Badges in Experience Builder Sites \(Release Update\)](#)

To make sure that recognition badges aren't visible to guest users unintentionally, the default rules now allow only authenticated users to see them. But you can turn off the default setting if you prefer. This update was first made available in Winter '22 and is enforced in Winter '22.

Hide More Personal Information Fields

Prevent external users, such as portal or partner users, from viewing personal information in your user records. Now when you apply the Enhanced Personal Information Management setting, Salesforce blocks view access to 20 fields that are considered personal information. This setting is also more flexible than the Hide Personal Information setting. To implement this setting, in User Management Settings, add or remove the PersonalInfo compliance category for any field.

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

SEE ALSO:

[Hide More Personal Information Fields from External Users](#)

Create Sharing Rules to Retain and Control Guest Users' Product Access (Release Update)

To better protect your Salesforce data, this update changes how unauthenticated guest access to product records is controlled. To prevent guest users from losing access to products, create and test guest user sharing rules. The Product org-wide sharing default for external users is no longer applied to guest users, and guest user access is set to Private. This setting can't be changed. This update was first made available in Winter '22.

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

When: The setting Secure guest user record access isn't applied to products in Winter '22. Salesforce will enforce this update in Spring '22.

SEE ALSO:

[Create Sharing Rules to Retain and Control Guest Users' Access to Products \(Release Update\)](#)

[Set Organization-Wide Sharing for Products \(Release Update\)](#)

Bid Farewell to Run Flows for Guest Users

The Run Flows permission for the Guest User and Experience Cloud External User profiles is no longer available in new orgs, starting in Winter '22. Without the Run Flows permission, you're free to use the more granular permission structure embedded in Flows and give your users the detailed access they need. Run Flows will be removed from all orgs in the Summer '22 release. To avoid future access issues, we recommend updating your existing sites to the new permission structure before the Summer '22 release.

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:

[Salesforce Help: How Does Flow Security Work? \(can be outdated or unavailable during release preview\)](#)

Removal of Guest User Access to Recognition Badges in Experience Builder Sites (Release Update)

To make sure that recognition badges aren't visible to guest users unintentionally, the default rules now allow only authenticated users to see them. But you can turn off the default setting if you prefer. This update was first made available in Winter '22 and is enforced in Winter '22.

Where: This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: This update was first available in Winter '22 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.

How: To turn off **Hide badges from guest users in Experience Builder sites**, go to **Setup>Feature Settings>Digital Experiences>Settings**.

SEE ALSO:

[Release Updates](#)

Other Changes

Learn about additional Experience Cloud improvements.

IN THIS SECTION:

[Get More Contact Information on Portal Users](#)

Now when a portal user is added, the user's middle name, suffix, and informal name are included from the Contact record. To view these fields on the record, select the settings on the User Interface page. Then add the fields to the Contact page layout.

[Customize Your Experience Cloud Site's Device Activation Emails](#)

Maintain consistent branding for your site with the Device Activation email template. If you have device activation enabled for your site, Salesforce sends users a one-time password (OTP) via a generic email anytime they log in from an unfamiliar browser, app, or location. You can now customize the email to tailor your communication with site users.

[Specify a Language for Email and SMS Messages When Using `initSelfRegistration`](#)

When you're using Apex to manage identity verification for Experience Cloud sites, guarantee that self-registration verification messages are sent in the correct language. The `initSelfRegistration` method now detects the user's language through the User object. Use the `LanguageLocaleKey` field on the User object to specify a language for email and SMS verification messages. Previously, the method determined the user's language through request parameters, cookies, or the user's browser.

[Files Connect for SharePoint On-Premises is Being Retired](#)

Files Connect for SharePoint On-Premises and Secure Agent will be retired on October 1, 2021. We recommend that you move to Files Connect for SharePoint Online or plan for an alternative solution.

Get More Contact Information on Portal Users

Now when a portal user is added, the user's middle name, suffix, and informal name are included from the Contact record. To view these fields on the record, select the settings on the User Interface page. Then add the fields to the Contact page layout.

Where: This change applies to [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

Customize Your Experience Cloud Site's Device Activation Emails

Maintain consistent branding for your site with the Device Activation email template. If you have device activation enabled for your site, Salesforce sends users a one-time password (OTP) via a generic email anytime they log in from an unfamiliar browser, app, or location. You can now customize the email to tailor your communication with 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: Add the Device Activation email template from the Emails page of the Administration workspace. Then you can personalize the template through the Classic Email Templates page in Setup. You can also edit the template through the API using the `DeviceActEmailTemplateId` field on the API Network object.

SEE ALSO:

[Salesforce Help: Customize the Device Activation Email Template \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Email Sent from Experience Cloud Sites for Email Verification \(can be outdated or unavailable during release preview\)](#)

[Object Reference: Network \(can be outdated or unavailable during release preview\)](#)

Specify a Language for Email and SMS Messages When Using `initSelfRegistration`

When you're using Apex to manage identity verification for Experience Cloud sites, guarantee that self-registration verification messages are sent in the correct language. The `initSelfRegistration` method now detects the user's language through the User object. Use the `LanguageLocaleKey` field on the User object to specify a language for email and SMS verification messages. Previously, the method determined the user's language through request parameters, cookies, or the user's browser.

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:

[Apex Reference Guide: UserManagement Class \(can be outdated or unavailable during release preview\)](#)

Files Connect for SharePoint On-Premises is Being Retired

Files Connect for SharePoint On-Premises and Secure Agent will be retired on October 1, 2021. 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.

When: October 1, 2021

Why: Microsoft has ended mainstream support for both SharePoint 2010 and 2013, the on-premises versions supported by Files Connect. Secure Agent, which serves as the communication layer between Salesforce first-party data centers and SharePoint hosted in customer data centers, is also being retired on October 1.

SEE ALSO:

[Files Connect for SharePoint On-Premises Retirement](#)

Field Service

Let customers efficiently set and manage their appointments without calls with Self-Service Scheduling for Appointment Assistant. Save time and money by giving your customers technical support without going on-site with Visual Remote Assistant. Prevent costly maintenance missteps by creating criteria-based asset maintenance plans. Enhanced features in shift patterns and templates help you streamline resource planning and scheduling. And with custom actions, make Work Plans work better for your business.

IN THIS SECTION:

[Field Service Resource Management](#)

Let dispatchers focus on schedules, not clocks, with the time zone toggle to view shift schedules in the resource's time zone. Shift pattern enhancements make it even easier and faster to create repeating shifts for multiple resources. And with manual sharing, your team can share records with users not included in sharing rules.

[Field Service Asset Management](#)

Use maintenance work rules to schedule preventive maintenance for your assets to avoid downtime. And you can streamline work rule scheduling with the calendar interface.

[Field Service Administration and Processes](#)

Boost Work Plans Lightning web component usability with custom actions. Let workers access the Work Plans Lightning web component on their Experience Builder site to keep them on track with guided steps for completing their work.

Field Service Customer Engagement

Enable customers to manage their own appointments and reduce appointment handling with Self-Service Scheduling for Appointment Assistant. Enhance the use of Real-Time Location for Appointment Assistant by adding the component to the service appointment details and customizing location markers on the map. Allow end users to schedule future virtual appointments with Visual Remote Assistant, and invite them to join a video session using a mobile app. Share images and customize augmented reality markers for an enhanced remote user experience.

Field Service Mobile

Get more out of Work Plans with custom actions. Keep needed supplies stocked and ready before heading out on service appointments with mobile product transfers. Hide security warnings when opening page links so workers can get right to the info they're looking for.

Field Service Resource Management

Let dispatchers focus on schedules, not clocks, with the time zone toggle to view shift schedules in the resource's time zone. Shift pattern enhancements make it even easier and faster to create repeating shifts for multiple resources. And with manual sharing, your team can share records with users not included in sharing rules.

IN THIS SECTION:

[Make Resource Planning Easier with Enhanced Shift Patterns and Templates](#)

Create multiple shifts for multiple resources and eliminate repetitive scheduling. Quickly create shifts from patterns with a shift template in Experience Builder (formerly Communities). Easily add recordset filter criteria to shifts by adding it to the shift templates.

[Take the Guesswork Out of Scheduling Shifts in Different Time Zones](#)

Use the time zone toggle to accurately view shifts instead of calculating time zones on your own.

[Ease Shift Planning with Calendar and Shift Schedule Enhancements](#)

Quickly navigate dates by jumping from week to week or across months when creating shifts. See shift lengths more accurately with horizontal color bars for each shift on the schedule.

[Share Records with Manual Sharing for Field Service](#)

Now you can include users and user groups not covered by sharing rules by manually sharing records in Lightning Experience for Field Service. For example, share service appointment records with team members other than the service worker.

Make Resource Planning Easier with Enhanced Shift Patterns and Templates

Create multiple shifts for multiple resources and eliminate repetitive scheduling. Quickly create shifts from patterns with a shift template in Experience Builder (formerly Communities). Easily add recordset filter criteria to shifts by adding it to the shift templates.

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

Who: The shift templates and pattern feature in Experience Builder is now available with the Field Service Contractor and Contractor Plus licenses.

Why: Add multiple service resources when you create shifts from shift pattern templates.

New Shifts from Pattern

Select Shift Pattern

To create new shifts, select a shift pattern. Shift Patterns are made up of shift templates to define a set or recurring cycle of shifts.

* Shift Pattern

Alternate day

Pattern Settings

* Scheduling Start

Sep 1, 2021

* Scheduling End

☒ On a date

* End Date

Sep 30, 2021

☐ After a number of occurrences

* Status

Tentative

Service Territory

Search Service Territories...

Assigned Service Resource

Search Service Resources...

Joshua Smith X
Peter King X
JojuStdUserServiceResource X

You're creating **60 shifts** assigned to **Joshua Smith, Peter King, JojuStdUserServiceResource** between 09/01/2021—09/30/2021.

Cancel

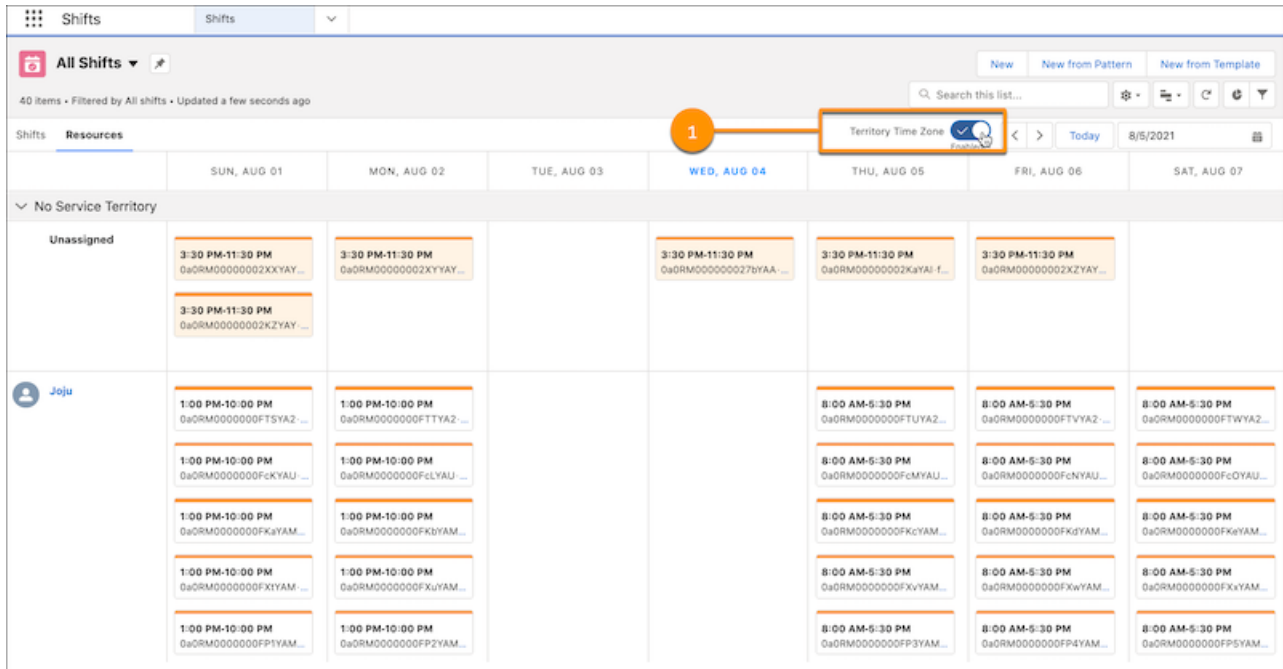
Create Shifts

Take the Guesswork Out of Scheduling Shifts in Different Time Zones

Use the time zone toggle to accurately view shifts instead of calculating time zones on your own.

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

How: Create resource schedules, then to view a schedule in the resource's time zone, turn on Territory Time Zone (1). Toggle it off to see the schedule in the shift manager's time zone.



SEE ALSO:

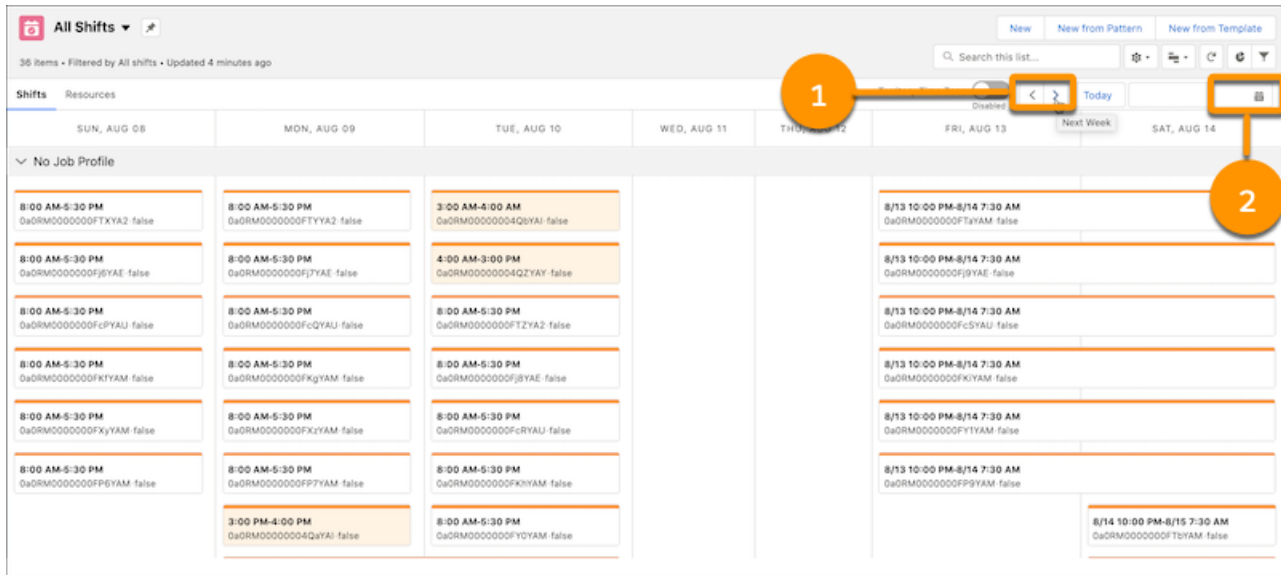
[Salesforce Video: Resource Time Zone](#)

Ease Shift Planning with Calendar and Shift Schedule Enhancements

Quickly navigate dates by jumping from week to week or across months when creating shifts. See shift lengths more accurately with horizontal color bars for each shift on the schedule.

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

How: Use the arrows (1) to move forward and backward by one week, or use the calendar (2) to navigate across months.



SEE ALSO:

[Salesforce Help: View Your Shift Schedule](#) (can be outdated or unavailable during release preview)

Share Records with Manual Sharing for Field Service

Now you can include users and user groups not covered by sharing rules by manually sharing records in Lightning Experience for Field Service. For example, share service appointment records with team members other than the service worker.

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

How: Click **Sharing** on the record that you want to share. In the Share window, you can add users who aren't included in sharing rules and share any associated records. All Field Service objects allow manual sharing except Asset, which allows manual sharing only in Salesforce Classic.

SEE ALSO:

[Salesforce Help: Grant Access to Records with Manual Sharing in Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Limit Access to Field Service Records](#) (can be outdated or unavailable during release preview)

Field Service Asset Management

Use maintenance work rules to schedule preventive maintenance for your assets to avoid downtime. And you can streamline work rule scheduling with the calendar interface.

IN THIS SECTION:

[Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria](#) (Beta)

Proactively avoid downtime by creating preventive maintenance plans based on asset use, condition, and recommended maintenance schedules. You can use any criteria to create a plan. For example, you can automatically schedule service for an asset if its temperature exceeds the specified threshold.

Schedule Recurring Work Rules Without Guesswork

Reduce your chances of error when scheduling recurring work rules by using a recurrence pattern instead of manually entering RRULE values.

Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria (Beta)

Proactively avoid downtime by creating preventive maintenance plans based on asset use, condition, and recommended maintenance schedules. You can use any criteria to create a plan. For example, you can automatically schedule service for an asset if its temperature exceeds the specified threshold.

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



Note: This feature is a Beta Service. Customers 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: Select Maintenance Work Rule as the Source Object and Asset as the Filtered Object. Select a Logical Operator to define if the criteria is valid if all conditions are true or at least one of the conditions is true. Select the field to match on, operator, and the match value. Save the filter criteria.

New Recordset Filter Criteria

Map a source and filtered object. Create filters for the source object based on field values in the filtered object. [Tell Me More](#)

* Recordset Filter Criteria Name

Description

* Source Object

* Filtered Object

☒ Active

Conditions

The filter criteria is valid when...

Logical Operator

* Criteria Field <input type="text" value="Temperature F"/>	* Operator <input type="text" value="Greater Than"/>	* Value <input type="text" value="100"/>
----------------------------------------------------------------	---------------------------------------------------------	---------------------------------------------

[+ Add Condition](#)

SEE ALSO:

[Salesforce Help: Guidelines for Generating Work Orders from a Maintenance Plan \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Any Criteria Based Maintenance](#)

Schedule Recurring Work Rules Without Guesswork

Reduce your chances of error when scheduling recurring work rules by using a recurrence pattern instead of manually entering RRULE values.

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

New Maintenance Work Rule

▼ **Description**

* Work Rule Type ⓘ
Calendar Based Work Rule ▼

* Maintenance Work Rule Title
Enter Work Rule Title...

▼ **General Information**

Maintenance Asset
MA-0123 X

Work Type ⓘ
Search Work Types... Q

Maintenance Plan
Search Maintenance Plans... Q

▼ **Work Order Generation**

Define how often work is scheduled for this rule and at what point scheduling should stop.

* Date of the first work order in the next batch ⓘ
Select a date... 📅

* Sort Order ⓘ
1

▼ **Recurrence Pattern**

* Recurrence Period ⓘ * Frequency ⓘ
Days ▼ 3

* Recurrence End ⓘ

☐ Never

☒ After Occurrences
16

☐ Date
Select a Date... 📅

Cancel Save & New Save

SEE ALSO:

[Salesforce Help: Guidelines for Generating Work Orders from a Maintenance Plan \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Advanced Preventive Maintenance](#)

Field Service Administration and Processes

Boost Work Plans Lightning web component usability with custom actions. Let workers access the Work Plans Lightning web component on their Experience Builder site to keep them on track with guided steps for completing their work.

IN THIS SECTION:

[Enhance the Usability of the Work Plans Lightning Web Component with Custom Actions](#)

Add custom actions to the action menus of work plan and work step records in the Work Plans Lightning web component. For example, add an action that lets users change the status of a work step to In Progress.

[Give Users Access to Work Plans on Their Experience Builder Site](#)

Make the Work Plans Lightning web component accessible to users on their Experience Builder site so that they can view and complete assignments more quickly and with less guesswork.

Enhance the Usability of the Work Plans Lightning Web Component with Custom Actions

Add custom actions to the action menus of work plan and work step records in the Work Plans Lightning web component. For example, add an action that lets users change the status of a work step to In Progress.

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

How: In Object Manager, go to Buttons, Links, and Actions and create a new action for the work plan or work step object. Then add the action to the page layout of the work plan or work step record.

SEE ALSO:

[Salesforce Help: Create Work Plans \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Customize Work Plans Settings \(can be outdated or unavailable during release preview\)](#)

Give Users Access to Work Plans on Their Experience Builder Site

Make the Work Plans Lightning web component accessible to users on their Experience Builder site so that they can view and complete assignments more quickly and with less guesswork.

Where: This change applies to Experience Builder sites for Field Service in Enterprise, Performance, Unlimited, and Developer editions.

How: In Experience Builder, from the Components panel, drag the Work Plans component onto an editable area of your site's page.

SEE ALSO:

[Salesforce Help: Edit Pages and Components in Experience Builder \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Work Plans \(can be outdated or unavailable during release preview\)](#)

Field Service Customer Engagement

Enable customers to manage their own appointments and reduce appointment handling with Self-Service Scheduling for Appointment Assistant. Enhance the use of Real-Time Location for Appointment Assistant by adding the component to the service appointment details and customizing location markers on the map. Allow end users to schedule future virtual appointments with Visual Remote Assistant, and invite them to join a video session using a mobile app. Share images and customize augmented reality markers for an enhanced remote user experience.

IN THIS SECTION:

[Give Your Customers Control over Their Appointments](#)

Let your customers book, reschedule, cancel, and confirm appointments. Use Self-Service Scheduling for Appointment Assistant to reduce call volumes, balance agent workload, and help avoid no-shows.

[Let Back-Office Workers See What Customers See](#)

Show your admins, dispatchers, and agents the same Real-Time Location component that customers see in the service appointment details. The estimated time of arrival, map view, and mobile worker details in the component help back-office workers provide customers with better service.

[Personalize the Real-Time Location Map with Custom Icons](#)

Add your own icons to mark the mobile worker's location and the customer's location on the map in Appointment Assistant. For example, use the company logo to give your map a personal touch.

[Expand Remote Video Capabilities for Mobile Workers with the Visual Remote Assistant Mobile App](#)

Provide mobile workers with professional video capabilities to enhance the visual quality during a video session. Benefit from using camera features, such as Exposure, Focus, Zoom, and Flashlight, with the Visual Remote Assistant mobile app.

[Facilitate Virtual Appointments Using Visual Remote Assistant](#)

Save time, reduce costs, and promote safety by scheduling virtual appointments between agents or mobile workers and customers with Visual Remote Assistant.

[Improve Collaboration by Sharing Images during a Remote Visual Session](#)

Save time on repeating explanations and cut down call handling time by sharing annotated images during a Visual Remote Assistant session.

[Deliver Service Anytime, Anywhere with Visual Remote Assistance for Sales and Experience Clouds](#)

You can now use Visual Remote Assistant from the Sales and Experience clouds to engage with communities, customers, and partners via video. Remote visual sessions keep workers, partners and customers safe, improve efficiency, and reduce costs.

[Boost Customer Support by Connecting Customers to the Mobile App from Their Regional App Store](#)

Improve support by letting agents select the customer's App Store regional location, such as North America or Europe, for Mobile Screen Mirroring and Video Application modes. This setting redirects customers to the regional App Store for downloading the mobile app when joining a Visual Remote Assistant session.

[Enhance Your Visual Experience by Customizing Augmented Reality Magic Markers](#)

Let your creativity do the magic! Create a better augmented reality experience with customized markers that trigger the display of virtual information. For example, select a different color for each user, change the line width, or set the fading timeout.

Give Your Customers Control over Their Appointments

Let your customers book, reschedule, cancel, and confirm appointments. Use Self-Service Scheduling for Appointment Assistant to reduce call volumes, balance agent workload, and help avoid no-shows.

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

How: Set up flows, and send your customers links to the Self-Service Scheduling webpages.

SEE ALSO:

[Salesforce Video: Appointment Assistant Self-Service Scheduling](#)

[Salesforce Help: Set Up Appointment Assistant Self-Service Scheduling \(can be outdated or unavailable during release preview\)](#)

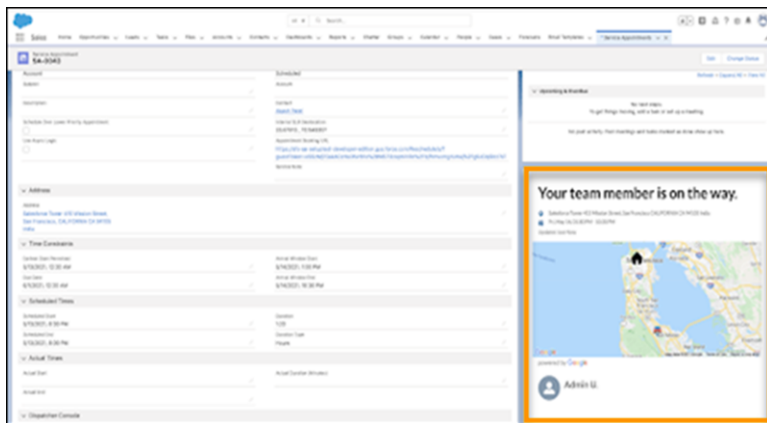
[Notify Customers When Workers Are Arriving](#)

Let Back-Office Workers See What Customers See

Show your admins, dispatchers, and agents the same Real-Time Location component that customers see in the service appointment details. The estimated time of arrival, map view, and mobile worker details in the component help back-office workers provide customers with better service.

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

How: Add the Appointment Assistant Real-Time Location component to the Service Appointment layout.



SEE ALSO:

[Salesforce Help: Add the Real-Time Location Component to the Service Appointment Layout for Back-Office Users \(can be outdated or unavailable during release preview\)](#)

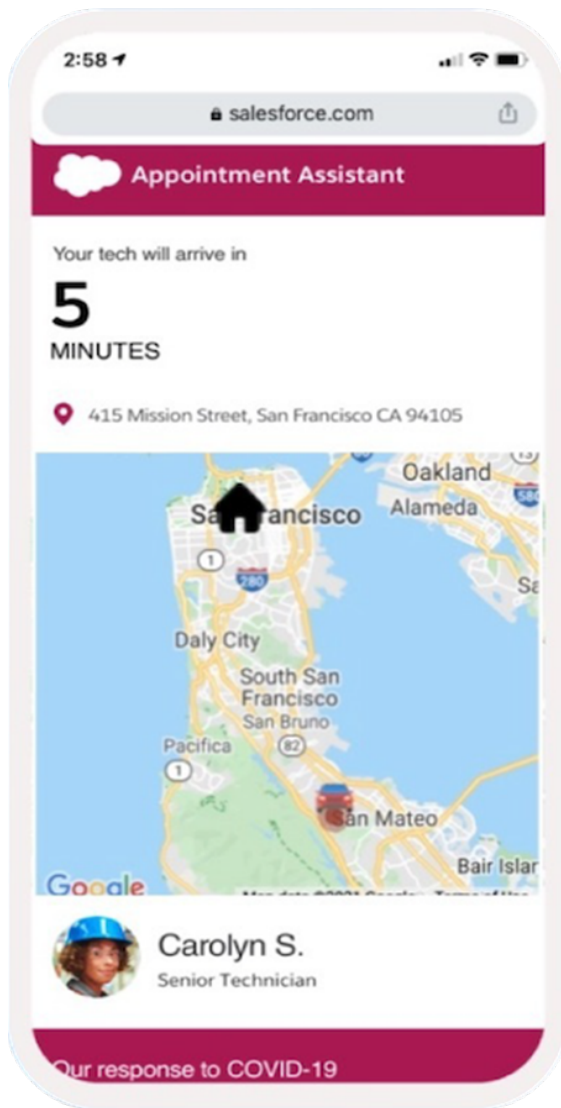
[Notify Customers When Workers Are Arriving](#)

Personalize the Real-Time Location Map with Custom Icons

Add your own icons to mark the mobile worker's location and the customer's location on the map in Appointment Assistant. For example, use the company logo to give your map a personal touch.

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

How: From Setup, create static resources for your custom icons, and copy their URLs. In Experience Builder, add the URLs to the Appointment Assistant's Real-Time Location component.



SEE ALSO:

[Salesforce Help: Manage What Customers See \(can be outdated or unavailable during release preview\)](#)

[Notify Customers When Workers Are Arriving](#)

Expand Remote Video Capabilities for Mobile Workers with the Visual Remote Assistant Mobile App

Provide mobile workers with professional video capabilities to enhance the visual quality during a video session. Benefit from using camera features, such as Exposure, Focus, Zoom, and Flashlight, with the Visual Remote Assistant mobile app.

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

How: From the mobile app Invite component, select the Video Application session type, and send the customer an invitation link. After the customer accepts the invitation to connect via video, they can download the app from their App Store and instantly start a session.

SEE ALSO:

[Trailhead: Visual Remote Assistant](#)

[Salesforce Video: Visual Remote Assistant](#)

Facilitate Virtual Appointments Using Visual Remote Assistant

Save time, reduce costs, and promote safety by scheduling virtual appointments between agents or mobile workers and customers with Visual Remote Assistant.

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

How: When the meeting time arrives, the agent or mobile worker starts the session to connect with the customer.

SEE ALSO:

[Trailhead: Visual Remote Assistant](#)

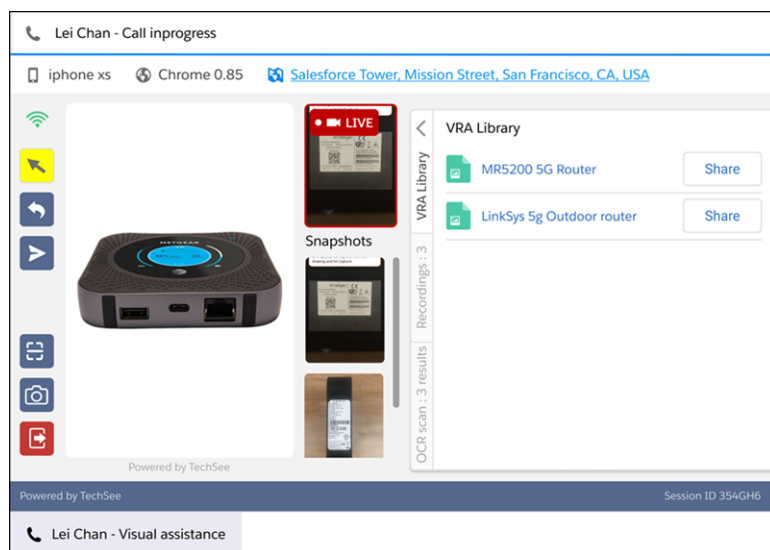
[Salesforce Video: Visual Remote Assistant](#)

Improve Collaboration by Sharing Images during a Remote Visual Session

Save time on repeating explanations and cut down call handling time by sharing annotated images during a Visual Remote Assistant session.

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

How: During the Visual Remote Assistant session, the agent can select an image and share it with the customer.



SEE ALSO:

[Trailhead: Visual Remote Assistant](#)[Salesforce Video: Visual Remote Assistant](#)

Deliver Service Anytime, Anywhere with Visual Remote Assistance for Sales and Experience Clouds

You can now use Visual Remote Assistant from the Sales and Experience clouds to engage with communities, customers, and partners via video. Remote visual sessions keep workers, partners and customers safe, improve efficiency, and reduce costs.

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

How: Add the Visual Remote Assistant components to the page layout and objects configuration.

SEE ALSO:

[Trailhead: Visual Remote Assistant](#)[Salesforce Video: Visual Remote Assistant](#)

Boost Customer Support by Connecting Customers to the Mobile App from Their Regional App Store

Improve support by letting agents select the customer's App Store regional location, such as North America or Europe, for Mobile Screen Mirroring and Video Application modes. This setting redirects customers to the regional App Store for downloading the mobile app when joining a Visual Remote Assistant session.

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

SEE ALSO:

[Trailhead: Visual Remote Assistant](#)[Salesforce Video: Visual Remote Assistant](#)

Enhance Your Visual Experience by Customizing Augmented Reality Magic Markers

Let your creativity do the magic! Create a better augmented reality experience with customized markers that trigger the display of virtual information. For example, select a different color for each user, change the line width, or set the fading timeout.

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

How: Configure the Magic Marker in the Visual Remote Assistant configuration wizard.

Magic Marker

The Magic Marker Configuration will allow you to control the look-and-feel and behavior of the Magic Marker. Magic Marker allows both the VRA agent and the end user to draw in real-time on the live video stream, in order to illustrate visually on top of the video the areas of interest. Use this configuration panel in order to control the following Magic Marker features:

Reset to default configuration

Feature	Value
Marker Color - Agent ⓘ	* Choose Color <div><div></div><div></div></div>
Marker Color - End User ⓘ	* Choose Color <div><div></div><div></div></div>
Marker Width ⓘ	<div>1 px</div>
Marker Timeout ⓘ	<div>2 seconds</div>

SEE ALSO:

Trailhead: Visual Remote Assistant

Salesforce Video: Visual Remote Assistant

Field Service Mobile

Get more out of Work Plans with custom actions. Keep needed supplies stocked and ready before heading out on service appointments with mobile product transfers. Hide security warnings when opening page links so workers can get right to the info they're looking for.

IN THIS SECTION:

Enhance Work Plans Usability with Custom Actions

Add custom actions to the action menus of work plan and work step records in the mobile app. For example, add an action that lets users change the status of a work step to In Progress.

Easily Transfer Products Between Locations

Move products from the warehouse to the work van or other locations with just a few taps on the mobile app. Mark products as received to update your inventory so that you don't run out of supplies or have too many sitting on the shelf.

Stop Deep Link Security Dialogs from Interrupting Your Work (Beta)

Hide persistent security warnings when opening deep links to actions.

Enhance Work Plans Usability with Custom Actions

Add custom actions to the action menus of work plan and work step records in the mobile app. For example, add an action that lets users change the status of a work step to In Progress.

Where: This change applies to Field Service for Android and iOS in Enterprise, Performance, Unlimited, and Developer editions.

How: In Object Manager, go to Buttons, Links, and Actions and create a new action for the work plan or work step object. Then add the action to the page layout of the work plan or work step record.

SEE ALSO:

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

Salesforce Help: Customize Work Plans Settings (can be outdated or unavailable during release preview)

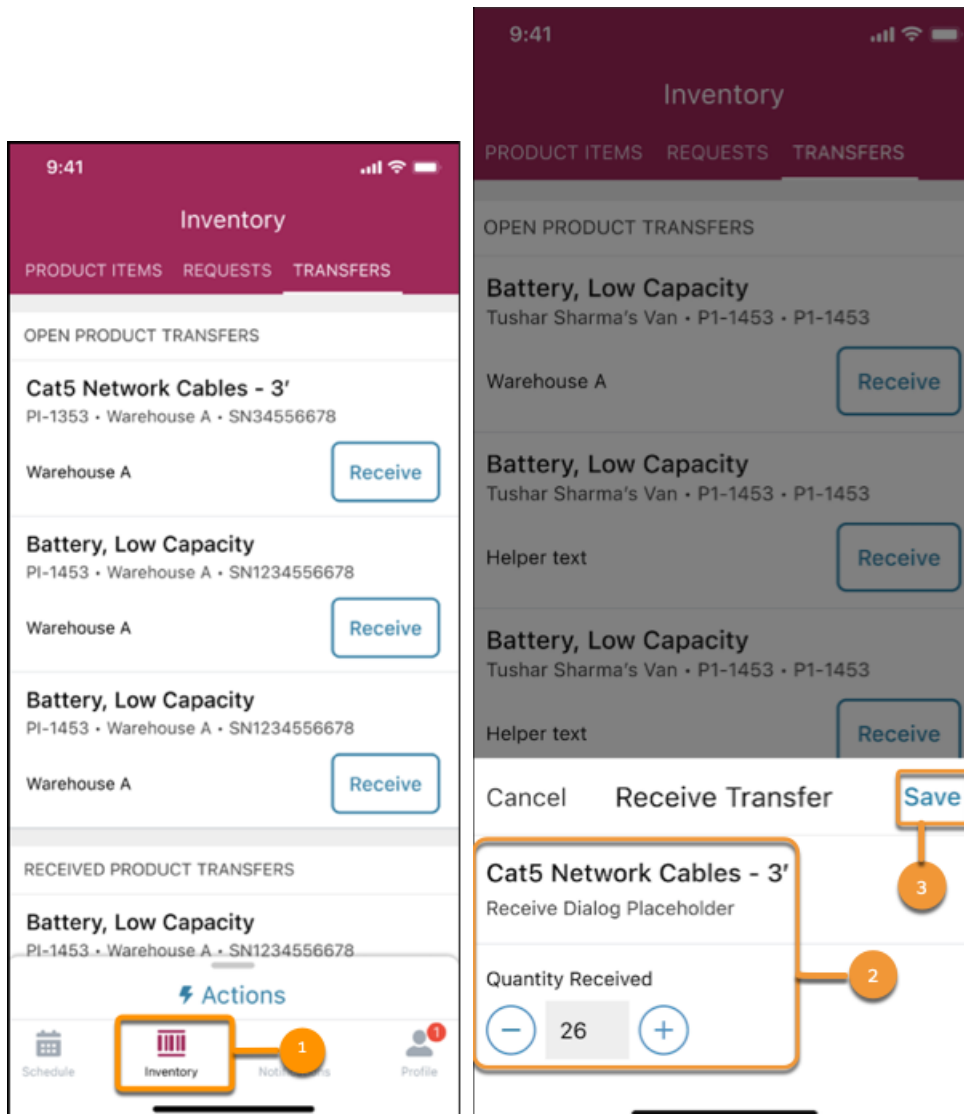
Salesforce Help: View and Complete Work Plans on the Field Service Mobile App (can be outdated or unavailable during release preview)

Easily Transfer Products Between Locations

Move products from the warehouse to the work van or other locations with just a few taps on the mobile app. Mark products as received to update your inventory so that you don't run out of supplies or have too many sitting on the shelf.

Where: This change applies to Field Service for Android and iOS in Enterprise, Professional, Unlimited, and Developer editions.

How: From the Actions menu, tap the Inventory tab to open product transfers (1). Select the products and quantity to transfer (2), then save your changes (3).



SEE ALSO:

[Salesforce Help: Transfer Inventory \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Mobile Base Product Transfer](#)

Stop Deep Link Security Dialogs from Interrupting Your Work (Beta)

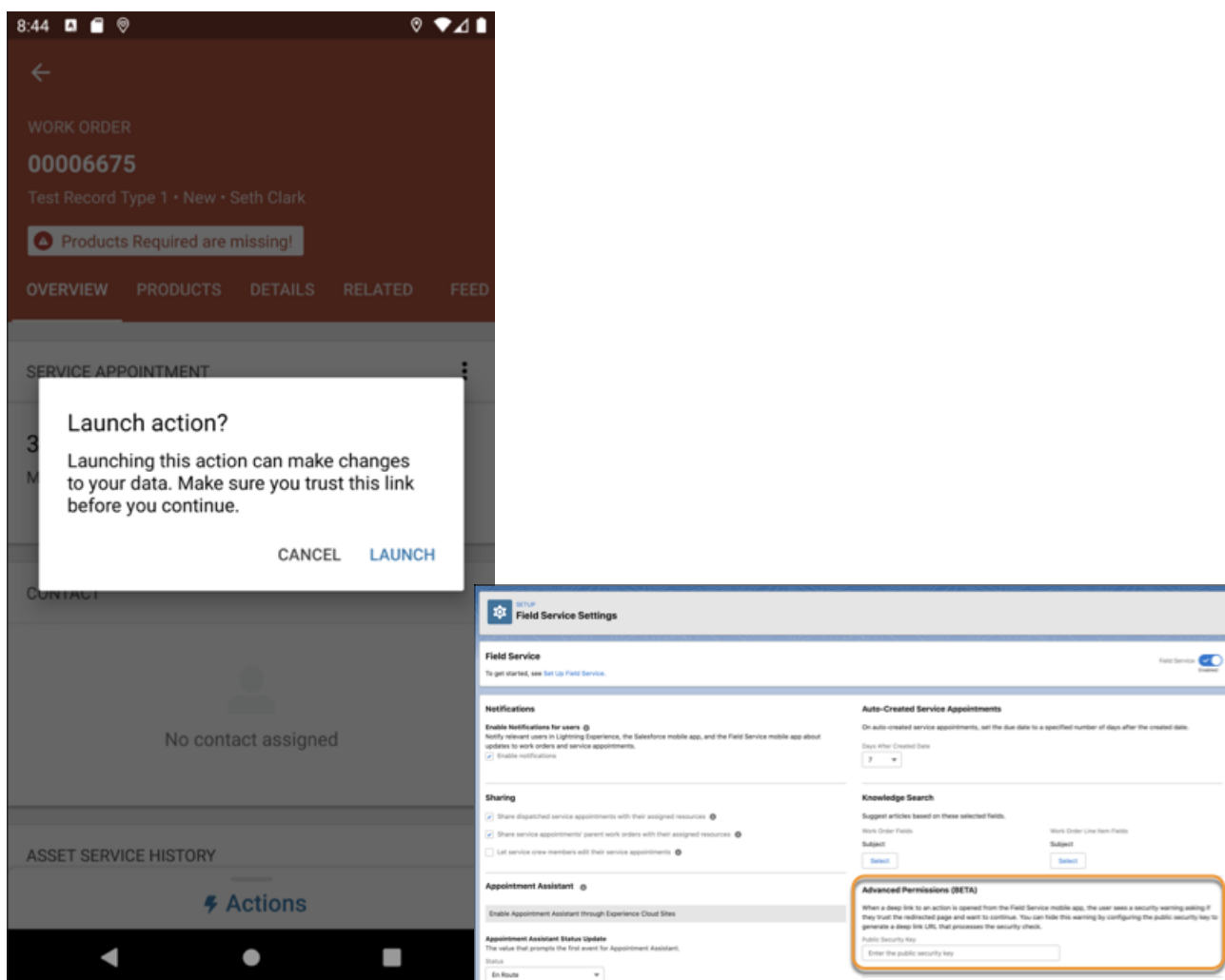
Hide persistent security warnings when opening deep links to actions.

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



Note: This feature is a Beta Service. Customers 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: When a user opens a deep link to an action within the Field Service mobile app, the user sees a security warning asking if they trust the link to the redirected page. Developers or admins can hide the warning by configuring the deep link URL with a security key. The deep link URL then processes the security check.



SEE ALSO:

[Developer Guide: Deep Linking Schema for the Field Service Mobile App \(can be outdated or unavailable during release preview\)](#)

Industries

Industries solutions for business verticals keep getting smarter and easier to use. Consumer Goods Cloud helps manage store visits and monitor stock better. Financial Services Cloud adds deal management and branch management. Health Cloud introduces automated benefit verification and user-friendly appointments. Manufacturing Cloud brings enhanced forecasting and SKU management. Public Sector Cloud makes licensing and permitting simpler and faster. Industries products that you can use in more than one Industries cloud, such as the data processing engine and decision tables, get significant enhancements.

IN THIS SECTION:[Consumer Goods Cloud](#)

Give field reps a productivity boost with product sequencing. Enable account hierarchy for products to help your sales managers easily manage product availability across stores. Let field reps execute visits even when they're offline using the new Consumer Goods Cloud Offline Mobile App. Enable field reps to view visit details and store-related information and conduct visits from a single page.

[Financial Services Cloud](#)

Enhance financial deal management by leveraging interaction summaries, actions plans, and paths. Relate multiple financial deals to a single interaction or interaction summary. Improve performance tracking by associating standard and custom object records with branches using the enhanced Record Association Builder. Manage multiparty authorization requests with the Intelligent Document Automation: Consent and Disclosures feature. Get actionable insights into claims management and policy administration with the Insurance Claims and Policy Analytics app.

[Health Cloud](#)

Check what services a patient is eligible for right when you book their appointment. Automated benefit verification helps providers improve access to care and the patient experience. Call centers and caregivers can manage appointments with fewer clicks. Set a confidence-level score threshold for incoming document content to speed up document review. And we're retiring the Candidate Patient object now that there are better ways to bring patients into Health Cloud.

[Manufacturing Cloud](#)

Develop holistic, accurate, and aligned forecasts to improve revenue, profits, and customer satisfaction. Define sales agreements flexibly with agreements for product categories. Leverage the out-of-the-box Data Processing Engine templates for your account forecast calculations. Do more with Manufacturing Cloud for Service.

[Public Sector Solutions](#)

Perform your inspection visits virtually and efficiently by using the Inspection Management desktop app. Create and use permission sets to give your employees access to Public Sector objects and data.

[Rebate Management](#)

Manage products for program rebate types easily with new features and enhancements. Do more with the new and enhanced out-of-the-box Data Processing Engine templates.

[Loyalty Management](#)

Let members pool points in groups. Hold a member's points in escrow for a period. Update member's points balance immediately after points are credited. Offer members promotions that match their profile and activities. Flexibly manage vouchers. Use content blocks in Marketing Cloud to send personalized emails. Trigger business processes with transaction journals.

[Industries: Common Components](#)

Some Industries products are available for use in more than one Industries solution, or in Clouds outside of Industries. In this release, we've enhanced filtering and performance for the Data Processing Engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex class for loyalty management, and much more.

Consumer Goods Cloud

Give field reps a productivity boost with product sequencing. Enable account hierarchy for products to help your sales managers easily manage product availability across stores. Let field reps execute visits even when they're offline using the new Consumer Goods Cloud Offline Mobile App. Enable field reps to view visit details and store-related information and conduct visits from a single page.

IN THIS SECTION:[Consumer Goods Cloud Offline Mobile App](#)

The configurable Consumer Goods Cloud offline mobile app, available for both mobile phones and tablets, lets field reps execute visits even when they're offline. Field reps can view visit details and store-related information, and conduct visits from a single page. They can see their visit schedule for the week, view the integrated route map, and reschedule visits. After the visits are completed, data automatically syncs to Salesforce.

[Boost Field Reps' Productivity with Product Sequencing](#)

Help your reps perform their visit tasks in the most effective order and make the most of the time they spend at stores during visits. With a predefined, logical sequence of products, you eliminate confusion and guesswork so that reps understand which product's assessment indicator to capture next.

[Manage Product Availability with Account Hierarchy for Products \(Generally Available\)](#)

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. This feature includes some changes since the pilot release. We added a View More button on the product list page to help you load more products in batches.

[Maximize Store Sales by Using Predictions](#)

Use predictions to provide intelligent visual insights into store tasks and help sales managers make smart decisions to improve sales. Use the out-of-the-box templates to quickly import customer data and prepare and create your smart sell story. Use smart sell story predictions to schedule store visits logically and to identify best-selling tasks for your sales reps. Use recipes and data flows to customize story predictions and prediction fields.

[Customer 360 Guide for Consumer Goods](#)

Integrate your route to market by planning, executing, and servicing B2B customers to drive business growth. The assets in this guide help consumer goods companies build a vision and make a plan for digital transformation. Architectural diagrams and business scenarios show you how Salesforce products combine with industry best practices to expand your business capabilities. Solution Kits included in the guide show you how to implement Salesforce-recommended cross-cloud solutions to common retail use cases.

[Changed Objects in Consumer Goods Cloud](#)

Do more with updated Consumer Goods Cloud objects.

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IN THIS SECTION:[See All Visit Details on One Page](#)

The easy-to-use, cockpit-based UI provides your field reps with a single access point for all visit activities. The reps can quickly navigate through the app, get information about stores and visits, and execute visits. The page also shows them when their device was last synced and the number of visits that are waiting for upload.

[Complete All Your Tasks Offline](#)

The new Consumer Goods Cloud offline mobile app lets field reps complete their inventory and custom tasks even when they're offline. Field reps can also view store-related information such as contact partners, location, operating hours, preferred visiting hours, in-store locations, and visit history.

Optimize Visit Time

Field reps can now scan barcodes during a site visit and reduce the time spent on inventorying products. Use barcodes, not lists and filters!

Use the App on Your Tablet

Field reps can continue to use the online mobile app on mobile phones or switch to the new offline app. On tablets, they can use the offline app in landscape or portrait mode.

Get a Head Start on Your Day

Your field reps can use the offline mobile app to quickly view their schedule for the week, reschedule visits, and review the route on a map. The app also provides traffic information, suggests the best route between stores, and guides the reps via turn-by-turn navigation to the next visit.

Customize Your App

Use Consumer Goods Cloud Modeler to design cockpits, change the look and feel of the UI, add objects and fields, build processes, and create business logic. You can use the Sync Management app to configure the objects that you want to sync the data for and deploy a customized UI to mobile devices. Sync Management also lets you monitor app health on your mobile devices.

Have the Right Data with You, Always!

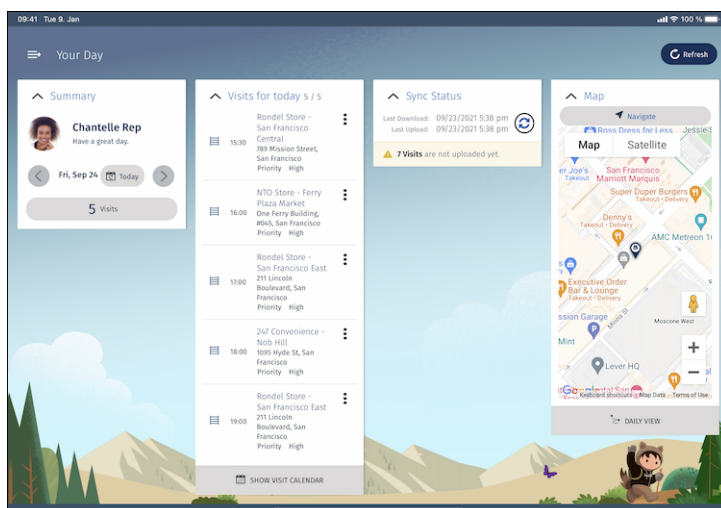
You can sync your mobile data with Salesforce at scheduled intervals or after a field rep has completed a visit. Field reps can also initiate manual syncs. Using the built-in Sync Management app, you can configure the objects that you want to sync the data for, define the corresponding synchronization rules, and deploy new app versions to all mobile devices in your org.

See All Visit Details on One Page

The easy-to-use, cockpit-based UI provides your field reps with a single access point for all visit activities. The reps can quickly navigate through the app, get information about stores and visits, and execute visits. The page also shows them when their device was last synced and the number of visits that are waiting for upload.

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: Launch the app. That's it! You land on the Your Day page, which is the user cockpit.

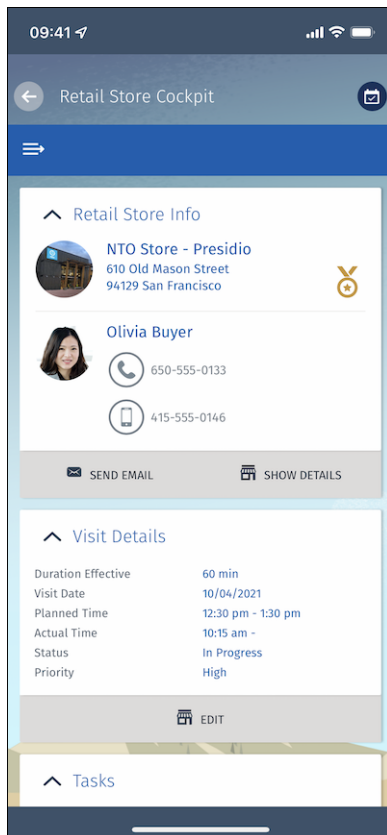


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Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: To go to the Retail Store Cockpit, tap on a visit in the **Visits for today** card in the user cockpit.



To view your visit schedule for the week, tap **Show Visit Calendar** in the **Visits for today** card.



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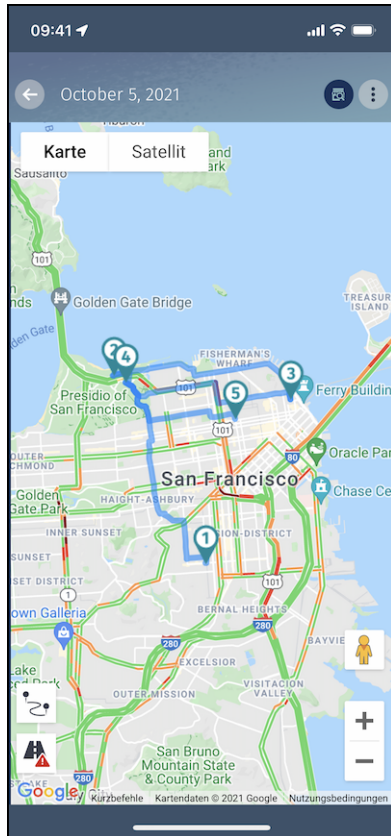
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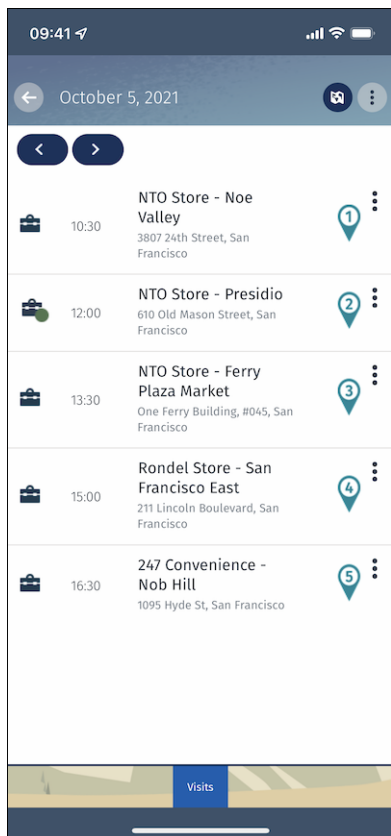
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Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: In the Retail Store Cockpit, the Map card shows the map with the current visit. Tap **Navigate** to see the route to the next visit.



Tap **Daily View** to see the list of visits scheduled for the day.



Customize Your App

Use Consumer Goods Cloud Modeler to design cockpits, change the look and feel of the UI, add objects and fields, build processes, and create business logic. You can use the Sync Management app to configure the objects that you want to sync the data for and deploy a customized UI to mobile devices. Sync Management also lets you monitor app health on your mobile devices.

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You can sync your mobile data with Salesforce at scheduled intervals or after a field rep has completed a visit. Field reps can also initiate manual syncs. Using the built-in Sync Management app, you can configure the objects that you want to sync the data for, define the corresponding synchronization rules, and deploy new app versions to all mobile devices in your org.

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Boost Field Reps' Productivity with Product Sequencing

Help your reps perform their visit tasks in the most effective order and make the most of the time they spend at stores during visits. With a predefined, logical sequence of products, you eliminate confusion and guesswork so that reps understand which product's assessment indicator to capture next.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: On a retail store record page, in the Store Product related list, click **Add**. Enter a display order for the new store product.

New Store Product

Product
Search Products...

Retail Store
Demo Store

Account
Search Accounts...

In-store Location
Search In-store Locations...

End Date

Start Date

Default Order Quantity

Display Order

Favorite
☐

Cancel Save & New Save

SEE ALSO:

[Associate a Product with a Store](#)

Manage Product Availability with Account Hierarchy for Products (Generally Available)

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. This feature includes some changes since the pilot release. We added a View More button on the product list page to help you load more products in batches.

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 *Retail Execution Settings*, and then select **Retail Execution Settings**. Enable **Account hierarchy for products**.

SETUP
Retail Execution Settings

Manage your inventory, promotions, planograms, and in-store activities.

Retail Execution

Account hierarchy for products
Make products that are associated with any account in a retail store's account hierarchy available to that retail store.

SEE ALSO:

[Enable Account Hierarchy for Products](#)

[Associate a Product with a Store](#)

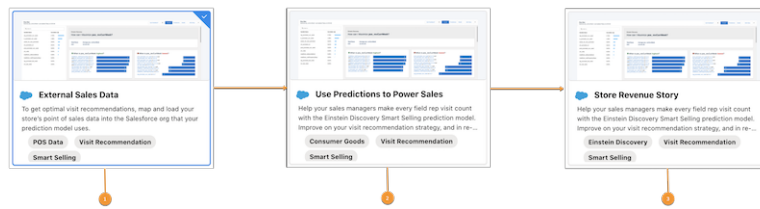
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Use predictions to provide intelligent visual insights into store tasks and help sales managers make smart decisions to improve sales. Use the out-of-the-box templates to quickly import customer data and prepare and create your smart sell story. Use smart sell story predictions to schedule store visits logically and to identify best-selling tasks for your sales reps. Use recipes and data flows to customize story predictions and prediction fields.

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

Who: To use this feature, users need the Retail Execution Lightning Plus permission set. For administrators, enable the TCRM Plus SKU add-on. For users, enable the Einstein Prediction SKU add-on.

How: In Analytics Studio, click **Create > App**, and then select one of the app templates.



- Use the External Sales Data (1) app to import your point of sales data that you can map to the Salesforce objects.
- Use the Predictions to Power Sales (2) app to map datasets and to run the preconfigured recipes to generate predictions for visit recommendations.
- Use the Store Revenue Story (3) app to select training and scoring datasets for the models and insights that you want to generate for visit recommendations.

After Einstein Discovery generates the model and insights data, you can load the data in a flow or create the next best action to get a visit recommendation. You can view the prediction-based recommendations in the Predictions Reasons section of the details page.

Customer 360 Guide for Consumer Goods

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IN THIS SECTION:

[Explore Consumer Goods 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.

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Explore Consumer Goods 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 Consumer Goods:

- [Manage Key Accounts](#)
- [Optimize Field Execution](#)
- [Transform B2B Commerce](#)
- [Incentivize Channel Partners](#)

Changed Objects in Consumer Goods Cloud

Do more with updated Consumer Goods Cloud objects.

New Field on RetailVisitKpi

Specify the order to display products, product categories, promotions, and other contexts for an assessment task

Use the new `PrimaryDisplayOrder` field.

New Field on StoreProduct

Specify the order to display products in a retail store

Use the new `DisplayOrder` field.

Financial Services Cloud

Enhance financial deal management by leveraging interaction summaries, actions plans, and paths. Relate multiple financial deals to a single interaction or interaction summary. Improve performance tracking by associating standard and custom object records with branches using the enhanced Record Association Builder. Manage multiparty authorization requests with the Intelligent Document Automation: Consent and Disclosures feature. Get actionable insights into claims management and policy administration with the Insurance Claims and Policy Analytics app.

IN THIS SECTION:

[Financial Deal Management](#)

Relate multiple financial deals to a single interaction or interaction summary using the enhanced Financial Deal data model. Improve a deal team's success rate by using action plans and paths with financial deals.

[Interaction Summaries](#)

Now your users can find interactions faster and at one place using the new options on the Interaction Summaries component. Your users can sort interaction summaries, preview attendees and open activities, and do more without navigating away from the component.

[More Flexible Performance Tracking with Record Association Builder](#)

Record Association Builder is the new name for the powerful association engine that lets you create relationships between records and branch units in response to record creation and update events. Record Association Builder now supports more Financial Services Cloud objects and custom objects. You can customize which user or contact ID field to use for associations, and even program custom logic for creating association records. All of the previous Branch Management (beta) functionality to associate records with branches can now be handled using Record Association Builder.

[Intelligent Document Automation](#)

The Intelligent Document Automation Consent and Disclosures feature now supports multiparty authorization requests. Send requests to multiple parties, gather their responses, and automatically evaluate whether consent is reached.

[Insurance for Financial Services Cloud](#)

The new Insurance Claims and Policy Analytics app gives you actionable insights to manage your claims and policies better.

[Other Financial Services Cloud Changes](#)

Do more with other Financial Services Cloud enhancements.

[New and Changed Financial Services Cloud Object Fields](#)

Do more with new and updated Financial Services Cloud objects.

Financial Deal Management

Relate multiple financial deals to a single interaction or interaction summary using the enhanced Financial Deal data model. Improve a deal team's success rate by using action plans and paths with financial deals.

IN THIS SECTION:

[Relate Multiple Financial Deals to Interactions and Interaction Summaries](#)

You can now create one interaction or interaction summary to track details of multiple financial deals. Adopt the enhanced Financial Deal data model that supports many-to-many relationships between financial deals and interaction summaries, and financial deals and interactions.

[Ensure Consistency and Compliance in Financial Deal Engagements with Action Plans](#)

You can now use Action Plans with the Financial Deal object. Action plans let you capture repeatable tasks in templates and then automate the task sequences. With action plans, you can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific financial deal engagements.

[Guide Deal Teams Toward Success with Path](#)

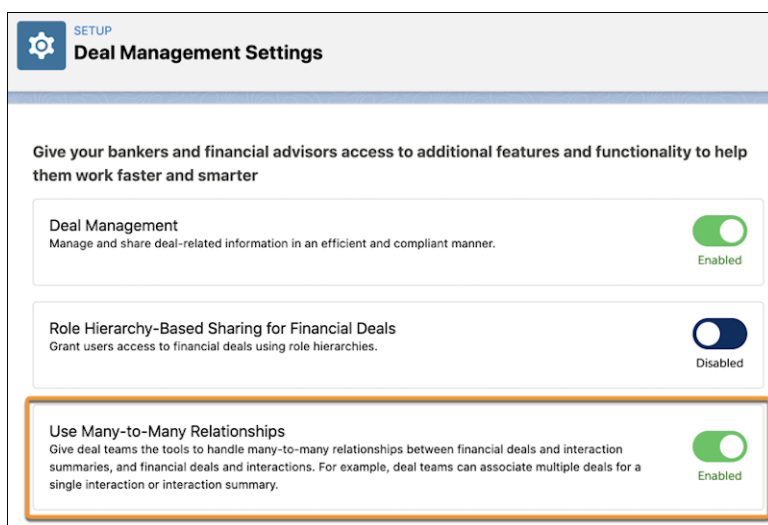
Enable Path for the Financial Deal object to increase a deal team's success. You can define steps that are important for financial deal execution and include customized guidance at each step of a path.

Relate Multiple Financial Deals to Interactions and Interaction Summaries

You can now create one interaction or interaction summary to track details of multiple financial deals. Adopt the enhanced Financial Deal data model that supports many-to-many relationships between financial deals and interaction summaries, and financial deals and interactions.

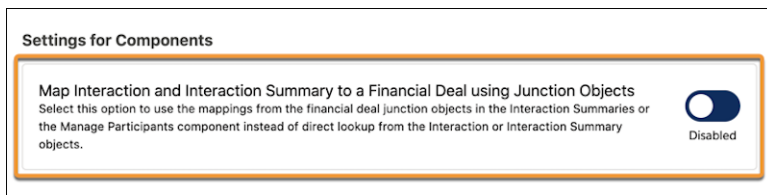
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: To adopt the data model that supports many-to-many relationships, from Setup, in the Quick Find box, enter **Deal Management**, and then select **Deal Management Settings**. Enable **Use Many-to-Many Relationships**.



If you want the components for financial deal management (Manage Participants and Interaction Summaries) to use the mappings from the financial deal junction objects, turn on **Map Interaction and Interaction Summary to a Financial Deal using Junction Objects**.

If you enable mappings from junction objects, the components ignore the direct lookup relationships from the Interaction or Interaction Summary objects.



Ensure Consistency and Compliance in Financial Deal Engagements with Action Plans

You can now use Action Plans with the Financial Deal object. Action plans let you capture repeatable tasks in templates and then automate the task sequences. With action plans, you can also enhance collaboration and productivity by automatically assigning task owners and deadlines for specific financial deal engagements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Add Action Plans to the related list on the Financial Deal page layout.

Guide Deal Teams Toward Success with Path

Enable Path for the Financial Deal object to increase a deal team's success. You can define steps that are important for financial deal execution and include customized guidance at each step of a path.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: From Setup, in the Quick Find box, enter *Path Settings*, select **Path Settings**, and then click **Enable**.

Provide a name for the Path, select the Object as **Financial Deal**, and then select the required picklist value.

Select the fields that you want to appear for your users, and provide guidance for each step in the path.

Interaction Summaries

Now your users can find interactions faster and at one place using the new options on the Interaction Summaries component. Your users can sort interaction summaries, preview attendees and open activities, and do more without navigating away from the component.

IN THIS SECTION:

[Get Details for an Interaction Summary Faster](#)

Your users can now quickly find details of attendees and open activities without navigating away from the component.

[Sort Interaction Summaries](#)

Your users have a new way to stay current on their partner and client interactions. They can now sort interaction summary records based on the creation date, interaction start date and time, or the last modified date.



Find Interaction Summaries Faster

You can now add the Interaction Summaries component to the Financial Deal, Opportunity, and Interaction record pages. You can also choose how to populate the interaction summary records—on the Interaction Summaries component—by selecting the lookup field that the component uses to populate records. Previously, the component populated records based only on the accountId lookup field.

Get Details for an Interaction Summary Faster

Your users can now quickly find details of attendees and open activities without navigating away from the component.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Add the Interaction Summaries component to the record page. To preview interaction attendees for an interaction summary, click the interaction attendees icon (). To preview open activities related to an interaction summary, click the open activities icon (). The previews display only 30 records. To view all records, click **View All**.

Sort Interaction Summaries

Your users have a new way to stay current on their partner and client interactions. They can now sort interaction summary records based on the creation date, interaction start date and time, or the last modified date.

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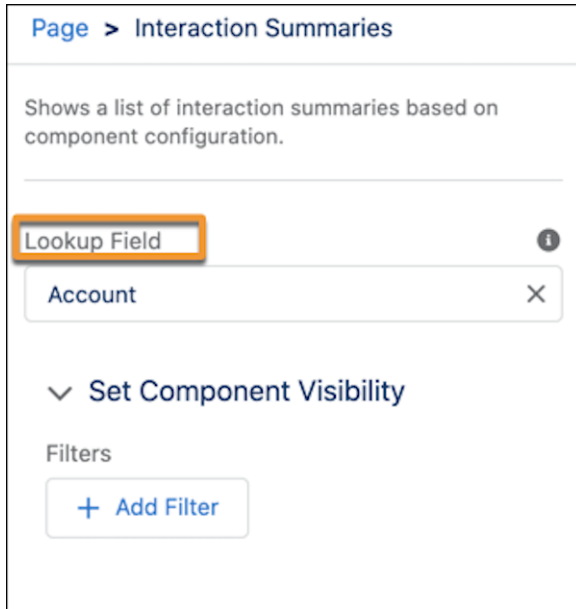
How: On the Interaction Summaries component, click the sort icon ().

Find Interaction Summaries Faster

You can now add the Interaction Summaries component to the Financial Deal, Opportunity, and Interaction record pages. You can also choose how to populate the interaction summary records—on the Interaction Summaries component—by selecting the lookup field that the component uses to populate records. Previously, the component populated records based only on the accountId lookup field.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: To configure the lookup field value, edit the record page and select the Interaction Summaries component. In the properties pane, select a value from the **Lookup Field** dropdown. The values in the dropdown vary depending on the record page that you're editing.



For the Home page layout, the component shows a list of all interaction summaries that a user can access. You can't override this behavior for home pages.

More Flexible Performance Tracking with Record Association Builder

Record Association Builder is the new name for the powerful association engine that lets you create relationships between records and branch units in response to record creation and update events. Record Association Builder now supports more Financial Services Cloud objects and custom objects. You can customize which user or contact ID field to use for associations, and even program custom logic for creating association records. All of the previous Branch Management (beta) functionality to associate records with branches can now be handled using Record Association Builder.

IN THIS SECTION:

[Record Association Builder Supports More Financial Services Cloud Objects](#)

The Financial Account and Assets and Liabilities objects can now be automatically associated to branch units using the Record Association Builder. Previously, the Record Association Builder supported four standard objects: Accounts, Cases, Leads, and Opportunities. Now the Financial Account and Assets and Liabilities objects have joined the list. No additional work is required to enable automatic record associations for these objects.

[Build Associations with Custom Objects](#)

Create automatic associations for any custom object that you care about using Record Association Builder's declarative and programmatic mapping features. Record Association Builder now supports custom objects and lets you specify customized logic for creating associations and related data in response to record creation and update events.

[Enhance Branch Performance Tracking with Record Association Builder](#)

The Branch Management (beta) functionality to associate records with branches can now be handled by Record Association Builder. To prevent data conflicts, don't activate the Record Association Builder and the Branch Management **Associate records to branches (Beta)** feature at the same time. We recommend using Record Association Builder because it offers the same record linking capability plus the flexibility to use custom objects and customized association logic. The Branch Management (beta) feature that associates records with branches will eventually be retired.

Add Association Criteria to Reports

The Association Criteria setup object can now be included in reports. Make sure your association data supports your key performance indicators by using Association Criteria reports to see all the active criteria at a glance.

Record Association Builder Supports More Financial Services Cloud Objects

The Financial Account and Assets and Liabilities objects can now be automatically associated to branch units using the Record Association Builder. Previously, the Record Association Builder supported four standard objects: Accounts, Cases, Leads, and Opportunities. Now the Financial Account and Assets and Liabilities objects have joined the list. No additional work is required to enable automatic record associations for these objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Build Associations with Custom Objects

Create automatic associations for any custom object that you care about using Record Association Builder's declarative and programmatic mapping features. Record Association Builder now supports custom objects and lets you specify customized logic for creating associations and related data in response to record creation and update events.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Record Association Builder now supports custom objects at each step of the association process. You can:

- Listen for events that occur when custom object records are created or updated.
- Define association criteria that evaluate custom object fields to decide whether to create an association.
- Generate an association record that uses the default owner ID field for an object, or choose a different ID field.
- Program custom Apex class logic to create the association record and even take additional actions when an association criteria is met.

To automatically create associations in response to custom object events, select the custom object in the Reference Object dropdown on the Association Criteria page and specify the event type. Then add a precondition formula to determine when a custom object event results in a new association.

New Criteria

Rule Details

* Name: My Custom Object Association

* API Name: My_Custom_Object_Association

* Association Type: BranchManagement

Description: When account-related record is create

Expression

* Reference Object: CustomObjectWithAccount(prb_Cus)

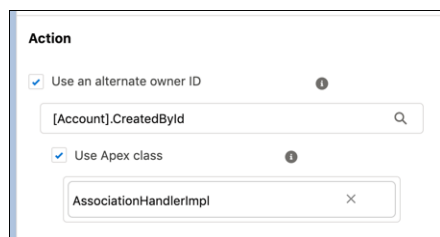
* Event Type: Create

* Precondition

Insert: Field Function Operator

[prb_CustomObjectWithAccount__c].prb_Account__r.AnnualRevenue > 1000000

By default, Record Association Builder uses the Owner ID field in the custom object record to determine which Branch Unit to associate the record with. The association uses the current branch unit assignment for the user or contact that's specified in the Owner ID field. You can choose to associate the records based on a different field, such as Created By Id or Last Modified Id. To change the default, select **Use an alternate owner ID** and then select an alternate ID field on the custom object.



Action

☒ Use an alternate owner ID

[Account].CreatedById

☒ Use Apex class

AssociationHandlerImpl

You can also program your own custom association handler logic and deploy it as an Apex Class. The handler is called whenever the association criteria evaluation logic is met. An Apex Class handler can control the Branch Unit Related Record data that's created and also execute other custom logic at that time.

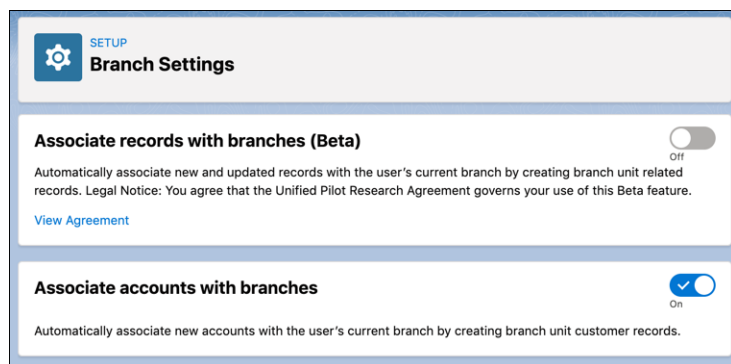
Enhance Branch Performance Tracking with Record Association Builder

The Branch Management (beta) functionality to associate records with branches can now be handled by Record Association Builder. To prevent data conflicts, don't activate the Record Association Builder and the Branch Management **Associate records to branches (Beta)** feature at the same time. We recommend using Record Association Builder because it offers the same record linking capability plus the flexibility to use custom objects and customized association logic. The Branch Management (beta) feature that associates records with branches will eventually be retired.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Record Association Builder creates associations using the same Branch Unit Related Record object as the Branch Management (Beta) feature does. Record Association Builder also provides new capabilities such as listening for events on custom objects and customizing the logic for creating associations and related data. You can create association criteria that exactly match the Branch Management logic to automatically associate records with branch units, and then move forward using the more flexible Record Association Builder.

Record Association Builder doesn't currently support creating Branch Unit Customer records. The Branch Settings page in Setup now includes a separate **Associate accounts with branches** setting to let you keep creating Branch Unit Customer associations even if the main **Associate records with branches (Beta)** feature is disabled.



SETUP
Branch Settings

Associate records with branches (Beta) Off

Automatically associate new and updated records with the user's current branch by creating branch unit related records. Legal Notice: You agree that the Unified Pilot Research Agreement governs your use of this Beta feature.

[View Agreement](#)

Associate accounts with branches On

Automatically associate new accounts with the user's current branch by creating branch unit customer records.

Add Association Criteria to Reports

The Association Criteria setup object can now be included in reports. Make sure your association data supports your key performance indicators by using Association Criteria reports to see all the active criteria at a glance.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Create a Custom Report Type that references the Association Criteria object. Then use that report type to generate reports that include the Association Criteria fields.

The screenshot shows the 'New Custom Report Type' setup page in Salesforce. The page is titled 'New Custom Report Type' and shows 'Step 1 of 2: Define the Custom Report Type'. It includes sections for 'Report Type Focus' (Primary Object: Related Record Association Criteria), 'Identification' (Report Type Label: Association Criteria Report, Report Type Name: Association_Criteria_Rej, Description: Lists all Association Criteria records), and 'Deployment' (Deployment Status: In Development).

Intelligent Document Automation

The Intelligent Document Automation Consent and Disclosures feature now supports multiparty authorization requests. Send requests to multiple parties, gather their responses, and automatically evaluate whether consent is reached.

IN THIS SECTION:

[Handle Multiparty Consent Authorization Requests](#)

Track authorization responses from multiple parties using the Intelligent Document Automation Consent and Disclosures feature. Request consent from multiple people for a document, gather their responses, and automatically evaluate whether consent is granted.

Handle Multiparty Consent Authorization Requests

Track authorization responses from multiple parties using the Intelligent Document Automation Consent and Disclosures feature. Request consent from multiple people for a document, gather their responses, and automatically evaluate whether consent is granted.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: When creating an Info Authorization Request, add a new Multiparty Info Authorization Request. Specify the Authorization Type to control how multiparty consensus is determined.

The Authorization Type picklist values are:

- **All:** Every person approves the request.
- **Any:** At least one person approves.
- **Half or Majority:** Half or more of the people approve.
- **Majority:** More than half the people must approve.

The response status for the Info Authorization Request is calculated according to the specified Authorization Type whenever a response is received from one of the parties.

Insurance for Financial Services Cloud

The new Insurance Claims and Policy Analytics app gives you actionable insights to manage your claims and policies better.

IN THIS SECTION:

[Manage Claims and Policies Effectively with Insurance Claims and Policy Analytics \(Generally Available\)](#)

Use the Insurance Claims and Policy Analytics app to get actionable insights into claims management and policy administration. Claim handlers and producers can prioritize tasks, claims, quotes, and policies that need immediate attention to improve customer satisfaction. Team leaders can assess their team's performance based on key metrics for claims and tasks.

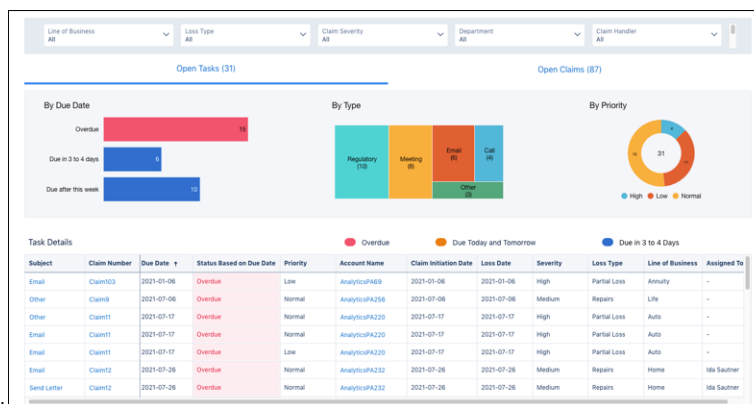
Manage Claims and Policies Effectively with Insurance Claims and Policy Analytics (Generally Available)

Use the Insurance Claims and Policy Analytics app to get actionable insights into claims management and policy administration. Claim handlers and producers can prioritize tasks, claims, quotes, and policies that need immediate attention to improve customer satisfaction. Team leaders can assess their team's performance based on key metrics for claims and tasks.

Where: This change applies to Tableau CRM in Lightning Experience and all versions of the Salesforce app in Enterprise, Unlimited, and Performance editions where Financial Services Cloud is enabled.

Who: To create an app from the Insurance Claims and Policy Analytics app, you need the FSCAnalyticsPlus add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App > Insurance Claims and Policy Analytics**. Follow the



instructions in the wizard to create your app.

Other Financial Services Cloud Changes

Do more with other Financial Services Cloud enhancements.

IN THIS SECTION:

[Increase Security for Interaction Summaries and Financial Deals with Shield Platform Encryption](#)

Use Shield Platform Encryption to add another layer of protection to client and partner interactions and deal-related information. Now you can encrypt fields on Interaction, Interaction Summary, Financial Deal, Interaction Summary Discussed Account, Financial Deal Interaction Summary, and Financial Deal Interaction Summary objects.

[Make It Easier to Share Records](#)

You can now use Opportunity and Financial Deal participants as suggestions to enable your users to easily share interactions and interaction summaries. You can configure the Manage Participants component to list users or groups from these participant types as suggestions.

[Remove Participants Selected for Sharing Records with a Single Click](#)

We've added user experience optimizations to the Manage Participants component. Your users can now remove participants more easily from the selected participants list.

Increase Security for Interaction Summaries and Financial Deals with Shield Platform Encryption

Use Shield Platform Encryption to add another layer of protection to client and partner interactions and deal-related information. Now you can encrypt fields on Interaction, Interaction Summary, Financial Deal, Interaction Summary Discussed Account, Financial Deal Interaction Summary, and Financial Deal Interaction Summary objects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud and Shield Platform Encryption is enabled.

SEE ALSO:

[Encrypt More Financial Services Cloud Data](#)

Make It Easier to Share Records

You can now use Opportunity and Financial Deal participants as suggestions to enable your users to easily share interactions and interaction summaries. You can configure the Manage Participants component to list users or groups from these participant types as suggestions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Edit an interaction summary or interaction record page. Click 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 then click **OK**.

Remove Participants Selected for Sharing Records with a Single Click

We've added user experience optimizations to the Manage Participants component. Your users can now remove participants more easily from the selected participants list.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How: On the Manage Participant component, select the user or group that you want to remove, and then click the delete icon ().

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Interaction Summary and Financial Deal

Capture information about companies discussed in an interaction.

Use the new `InteractionSumDiscussedAccount` object.

Represent a many-to-many relationship between an interaction summary and a financial deal.

Use the new `FinclDealInteractionSummary` object.

Represent a many-to-many relationship between an interaction and a financial deal.

Use the new `FinancialDealInteraction` object.

Link a financial deal with itself.

The Financial Deal object now supports a self-lookup relationship.

New Fields on Financial Deal

Capture the parent financial deal record.

Use the new `ParentFinancialDeal` field.

New Fields on Financial Deal Party

View the type of the financial deal party.

Use the new `PartyType` field.

Link a contact as a financial deal party.

Use the new `Contact` field. The Financial Deal Party object now has a lookup to the Contact object.

Intelligent Document Automation: Consent and Disclosures

Manage responses from multiple parties for an authorization request.

Use the new `MultipartyInfoAuthRequest` object.

Health Cloud

Check what services a patient is eligible for right when you book their appointment. Automated benefit verification helps providers improve access to care and the patient experience. Call centers and caregivers can manage appointments with fewer clicks. Set a confidence-level score threshold for incoming document content to speed up document review. And we're retiring the Candidate Patient object now that there are better ways to bring patients into Health Cloud.

IN THIS SECTION:

[Intelligent Appointment Management](#)

Schedulers can find the next available appointment with a single click, user-friendly appointment reasons reduce confusion, and the new setup assistant makes it easier and faster to get Appointment Management up and running.

[Medication Management](#)

Empower providers and care coordinators to help manage their patients' medications better with the new Medication Management feature in Health Cloud. The Lightning component of Medication Management shows a patient's medications as a list. This component has a built-in flow that helps users quickly add medications for relevant patients. Medication Management is also integrated with RxNorm to bring in normalized drug information from the U.S. National Library of Medicine. The comprehensive list view and normalized drug information can help your users reduce errors, enhance patient care quality, and lower healthcare costs.

[Provider Network Management](#)

Provider Network Management is a new add-on product that helps improve the provider experience, raise provider satisfaction rates, and maximize patient outcomes. Two new objects and a Lightning component help you register network participations and associate contracts with them.

[Set Up Provider Search Faster](#)

Use the setup assistant to get going with Provider Search. You can also access documentation right from the interface. Verify your progress using the progress indicator.

[Ease Your Transition to Person Accounts](#)

If you're switching from the individual data model to the person account model, now you can improve performance for your users by skipping some database queries.

[Verify Patient Benefits](#)

Integrate benefit verification into the end-to-end patient access workflow to make it easier and faster for patients to get the care they need. Help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's benefit plan, throughout the patient journey.

[Improve Data Extraction Efficiency by Using Confidence-Level Scores](#)

Health Cloud can help indicate values in a received document that require more attention. Users can quickly scan the extracted values that fall below a confidence-level score threshold you set, and fix them manually if needed. You can specify a threshold value from 0 through 100.

[Candidate Patient Object Is No More](#)

The Candidate Patient custom object is being retired. Users are no longer able to create new records in this object. Consider using Lead instead.

[Replacing the EHR Data Model with the Clinical Data Model](#)

Starting with the Winter '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart objects in the FHIR R4-aligned Clinical data model. Future development in Health Cloud will be built on the Clinical data model and won't use the packaged objects in the EHR data model.

[Health Cloud Has New and Changed Objects](#)

Access more data through these new and changed Health Cloud objects

[Connect REST API](#)

Patients REST API includes new calls.

Intelligent Appointment Management

Schedulers can find the next available appointment with a single click, user-friendly appointment reasons reduce confusion, and the new setup assistant makes it easier and faster to get Appointment Management up and running.

IN THIS SECTION:

[Self-Schedule Appointments from Anywhere](#)

Improve patient engagement and operational efficiencies by empowering patients to easily schedule their own appointments from anywhere. New and established patients can easily access appointment scheduling via Experience Cloud on desktop, mobile or a tablet, helping improve the patient experience while raising acquisition rates and decreasing call-center costs. Intelligent Appointment Management now offers an out-of-the-box application containing everything you need to quickly enable self-service scheduling for your patients.

[Give Users Appointment Scheduling Access](#)

Use two handy new Health Cloud Appointment Management permission sets to quickly get users the access they need.

[Switch Between Multiple Appointment Configurations](#)

Now you can save multiple appointment booking configurations so you can quickly make changes when needed. Only one configuration is active at a time. Make sure your existing configuration record has the Active box checked.

[Easier Setup for Intelligent Appointment Management](#)

Set up Intelligent Appointment Management easily and quickly by following the new setup assistant, complete with a progress indicator and links to detailed instructions.

[Show the Next Available Appointment](#)

No more scrolling through empty weeks on the calendar to find at the next available appointment for assigned or past clinicians. Now Health Cloud can do all of the work in the background with a single click.

[Specify a Single Source for Appointment Data](#)

Simplify maintenance and speed up transactions with the single source system flag. This setting indicates that your org uses only one external system for scheduling information.

[Customize Your Appointment Booking URL](#)

Use additional headers to include extra information, such as external tokens, in your appointment booking URL.

[Provide User-Friendly Appointment Reasons](#)

Use the new Appointment Reason object to let users specify the purpose of a visit they are scheduling.

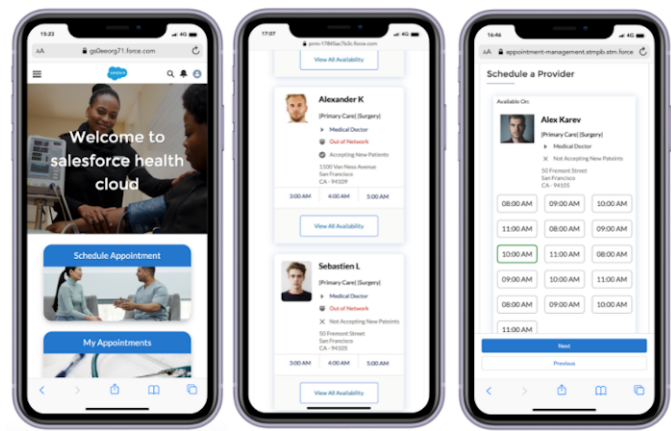
Self-Schedule Appointments from Anywhere

Improve patient engagement and operational efficiencies by empowering patients to easily schedule their own appointments from anywhere. New and established patients can easily access appointment scheduling via Experience Cloud on desktop, mobile or a tablet, helping improve the patient experience while raising acquisition rates and decreasing call-center costs. Intelligent Appointment Management now offers an out-of-the-box application containing everything you need to quickly enable self-service scheduling for your patients.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled and the Vlocity Health and Insurance package is installed.

Who: This feature is available to authenticated portal users (users who are signed into an Experience Cloud site) with the Customer Community for Health Cloud or Customer Community Plus for Health Cloud add-on and the Health Cloud Appointment Self-Service permission set.

How: Add the portal user to Salesforce, then assign the Health Cloud Appointment Self-Service permission set.



SEE ALSO:

[Health Cloud Admin Guide: Enable Patients to Schedule Their Own Appointments](#)

Give Users Appointment Scheduling Access

Use two handy new Health Cloud Appointment Management permission sets to quickly get users the access they need.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to portal users (users who are signed into an Experience Cloud site) and guest users with the Customer Community Plus for Health Cloud or the Customer Community for Health Cloud add-on and the Health Cloud Appointment Self-Service permission set.

How: Assign the Health Cloud Appointment Management permission set to individual users or to the group or profile representing call center agents and care coordinators. Assign the Health Cloud Self-Service permission set to your Experience Site user profile.

Permission Set Assignments		Edit Assignments
Action	Permission Set Label	
Del	Health Cloud Foundation	
Del	Tableau CRM Plus User	
Del	Health Cloud Appointment Management	
Del	Lightning Scheduler Resource	

Switch Between Multiple Appointment Configurations

Now you can save multiple appointment booking configurations so you can quickly make changes when needed. Only one configuration is active at a time. Make sure your existing configuration record has the Active box checked.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: COMING

How: In the Appointment Booking Configuration object, edit a configuration record and check the Active box.



Important: Your existing configuration record does not become active automatically. You must manually activate it and deactivate any other configuration records you create. At least one configuration record must be active for Intelligent Appointment Management to work.

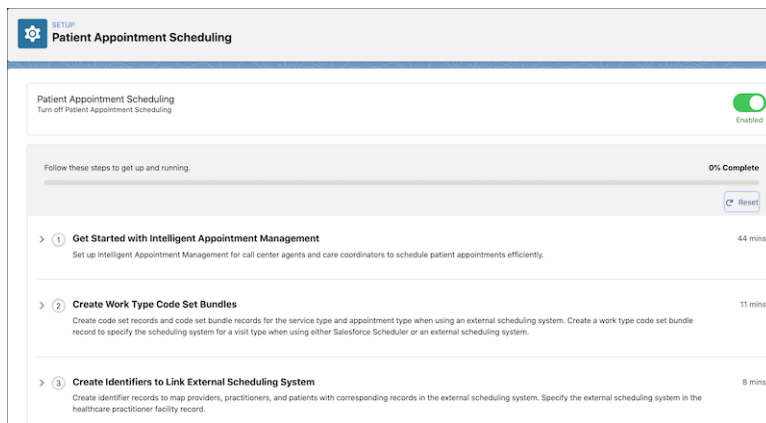
Easier Setup for Intelligent Appointment Management

Set up Intelligent Appointment Management easily and quickly by following the new setup assistant, complete with a progress indicator and links to detailed instructions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To create Health Cloud Provider Data objects, users need the Health Cloud Foundation permission set.

How: From Setup, in the Quick Find box, enter *Intelligent Appointment Management Settings*, and then select **Intelligent Appointment Management Settings**. To access the setup assistant, turn on **Patient Appointment Scheduling**.



Show the Next Available Appointment

No more scrolling through empty weeks on the calendar to find at the next available appointment for assigned or past clinicians. Now Health Cloud can do all of the work in the background with a single click.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Call center operators, care coordinators, and patients need immediate access to the next available appointment slot, without scrolling, whether they are using an EHR scheduling system or Salesforce Scheduler in the back end.

Specify a Single Source for Appointment Data

Simplify maintenance and speed up transactions with the single source system flag. This setting indicates that your org uses only one external system for scheduling information.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: If you don't need to pull in data from multiple electronic medical record systems, or you've set up middleware to function as a single EMR system, you don't need to send certain specific identifiers. This can save you trouble by producing a cleaner message that is quicker to parse and troubleshoot.

How: In Setup, select the **Single Source** option on the Appointment Scheduling Configuration page.

Customize Your Appointment Booking URL

Use additional headers to include extra information, such as external tokens, in your appointment booking URL.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: COMING

How: Add one or more key-value pairs to the HTTP request sent to an external scheduling system, like this:

Provide User-Friendly Appointment Reasons

Use the new Appointment Reason object to let users specify the purpose of a visit they are scheduling.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Custom-design a set of visit types to present to the user according to your organization's specific needs. You control the wording of the available "Reason for Visit" values so users can make an intuitive, personalized choice, either as a new patient or as an established patient.

How: To assign the Health Cloud Appointment Management permission set, from Setup, in the Quick Find box, enter *Users*, and select **Users > Permission Set Assignments**, and then edit assignments.

Medication Management

Empower providers and care coordinators to help manage their patients' medications better with the new Medication Management feature in Health Cloud. The Lightning component of Medication Management shows a patient's medications as a list. This component has a built-in flow that helps users quickly add medications for relevant patients. Medication Management is also integrated with RxNorm to bring in normalized drug information from the U.S. National Library of Medicine. The comprehensive list view and normalized drug information can help your users reduce errors, enhance patient care quality, and lower healthcare costs.

Important: Health Cloud Medication Management is not intended for use by, and should not be used by, organizations located in, or otherwise engaged in the provision of medical, healthcare, disease treatment or management, health benefits, research or similar services, in jurisdictions outside of the United States. [See more.](#)

This product uses publicly available data provided courtesy of the U.S. National Library of Medicine, National Institutes of Health, Department of Health and Human Services; NLM is not responsible for the product and does not endorse or recommend this or any other product.

IN THIS SECTION:

[Plan Medications Better with the Patient Medication Manager Lightning Component](#)

Give your providers and care coordinators a comprehensive view of all the medications that their patients take by using the Patient Medication Manager Lightning component. The list view in this component enables providers and care coordinators to more easily spot conflicting prescriptions and help avoid possible adverse drug outcomes.

Add Medications Seamlessly Using the Built-In Add Medication Flow

Clinicians can use the Add Medication flow in the Patient Medication Manager Lightning component to add medications for patients without navigating multiple objects.

Plan Medications Better with the Patient Medication Manager Lightning Component

Give your providers and care coordinators a comprehensive view of all the medications that their patients take by using the Patient Medication Manager Lightning component. The list view in this component enables providers and care coordinators to more easily spot conflicting prescriptions and help avoid possible adverse drug outcomes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Why: Medication-related information in Health Cloud is stored across multiple objects. The Patient Medication Manager Lightning component gathers all the information together and displays it in one place. Clinicians can then quickly scan the information and make updates as required without going to each record.

The screenshot shows the 'Patient Medication Manager' interface. At the top, there's a header with the component name and a filter set to 'All'. Below the header, a search bar and a list of medications are visible. The selected medication, 'metformin hydrochloride 500 MG Oral Tablet', is shown in detail. The details section includes a 'Details' tab and a 'Dosage Details' section. The 'Dosage Details' section has fields for 'Additional Instruction', 'Patient Instruction' (Take one tablet in the evening with meals), 'As Needed' (checked), 'Dosage Quantity Numerator' (1.00), 'Dosage Quantity Denominator', and 'Dosage Quantity Type'.

How: From Setup, go to Medication Management Settings, and then enable Medication Management. Then use the Lightning App Builder to add the Patient Medication Manager Lightning component to Person Account record pages.

Add Medications Seamlessly Using the Built-In Add Medication Flow

Clinicians can use the Add Medication flow in the Patient Medication Manager Lightning component to add medications for patients without navigating multiple objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Why: The Lightning component reduces the steps required to record medications. Because this flow is integrated with RxNorm, the flow can also gather normalized drug information from the U.S. National Library of Medicine. With this integration, users can avoid manually entering drug information, such as drug names, drug forms, and ingredients, which helps reduce the possibility of medication-related errors.

Add Medication

* Search

metFORMIN / pioglitazone

Brand Name Medication (4) **Generic Medication (4)**

Medications found: 4

- ☐ metformin HCl 850 mg and pioglitazone (as pioglitazone hydrochloride) 15 MG Oral Tablet
- ☐ metformin hydrochloride 1000 MG / pioglitazone 15 MG 24 HR Extended Release Oral Tablet
- ☐ metformin hydrochloride 1000 MG / pioglitazone 30 MG 24 HR Extended Release Oral Tablet
- ☐ metformin hydrochloride 500 MG / pioglitazone 15 MG Oral Tablet

Next

How: From Setup, go to Medication Management Settings, and then enable Medication Management. Then use the Lightning App Builder to add the Patient Medication Manager Lightning component to Person Account record pages.

Provider Network Management

Provider Network Management is a new add-on product that helps improve the provider experience, raise provider satisfaction rates, and maximize patient outcomes. Two new objects and a Lightning component help you register network participations and associate contracts with them.

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 [Vlocity documentation](#).

 **Note:** The Provider Recruiting and Credentialing Application features of the Vlocity Health and Insurance package are fully supported in Health Cloud. You will need the Vlocity HINS package for [OmniStudio](#). For information about all the features supporting end to end provider network management in the Vlocity package, see the [Vlocity Content \(formerly Express\) documentation](#).

IN THIS SECTION:

[Manage Network Participations](#)

Now you can integrate providers, provider practice locations, payer networks, and contracts using the new Network Participations component.

SEE ALSO:

[Health Cloud Developer Guide: Provider Network Management](#)

[Health Cloud Administrator Guide: Provider Network Management](#)

[Vlocity Success Community: Provider Network Management](#)

Manage Network Participations

Now you can integrate providers, provider practice locations, payer networks, and contracts using the new Network Participations component.

Where: This component is available in Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

How: Use the Lightning App Builder to add the Network Participations component to the business account record page or the person account record page. The component is also available on the Healthcare Payer Network.

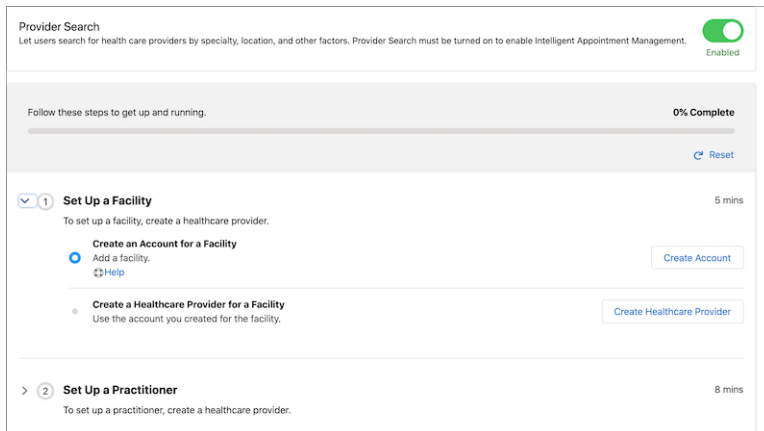
Set Up Provider Search Faster

Use the setup assistant to get going with Provider Search. You can also access documentation right from the interface. Verify your progress using the progress indicator.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: To create Health Cloud Provider Data objects, users need the Health Cloud Foundation permission set.

How: From Setup, in the Quick Find box, enter *Provider Search*, and then select **Provider Search Settings**. Enable **Provider Search**.



Provider Search
Let users search for health care providers by specialty, location, and other factors. Provider Search must be turned on to enable Intelligent Appointment Management. Enabled

Follow these steps to get up and running. 0% Complete Reset

☒ 1 **Set Up a Facility** 5 mins
To set up a facility, create a healthcare provider.

Create an Account for a Facility
Add a facility. Help Create Account

Create a Healthcare Provider for a Facility
Use the account you created for the facility. Create Healthcare Provider

> 2 **Set Up a Practitioner** 8 mins
To set up a practitioner, create a healthcare provider.

Ease Your Transition to Person Accounts

If you're switching from the individual data model to the person account model, now you can improve performance for your users by skipping some database queries.

Why: The individual model uses the Primary Contact field 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.

Verify Patient Benefits

Integrate benefit verification into the end-to-end patient access workflow to make it easier and faster for patients to get the care they need. Help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's benefit plan, throughout the patient journey.

Where: The benefits verification objects are available to users with the Health Cloud and the Health Cloud Platform permission set licenses and the Health Foundation permission set.

Why: Automated benefit verification helps care providers, pharma suppliers, and device makers improve access to care and patient experience. It supports a variety of service types and benefit models and seamlessly integrates this step into the end-to-end patient access workflow.

How: Connect Health Cloud to an external service that stores benefit codes so users can see eligibility status in real time as part of the patient intake flow.

SEE ALSO:

[Admin Guide: Set Up Benefit Verification](#)

[Developer Guide: Benefit Verification Data Model](#)

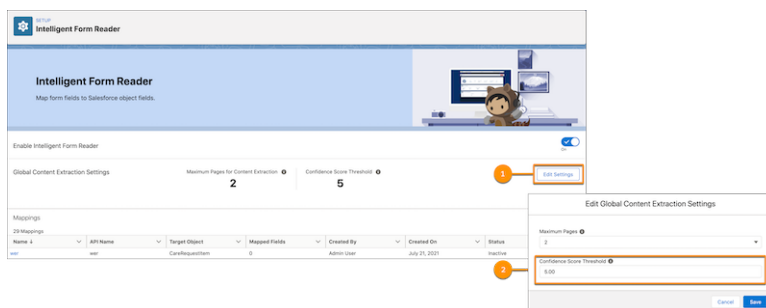
Improve Data Extraction Efficiency by Using Confidence-Level Scores

Health Cloud can help indicate values in a received document that require more attention. Users can quickly scan the extracted values that fall below a confidence-level score threshold you set, and fix them manually if needed. You can specify a threshold value from 0 through 100.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer Editions where the Intelligent Form Reader setting is enabled. This feature is available in Health Cloud.

Who: To use the extraction capability, users need the AWSTextract1000LimitAddOn license.

How: From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**.



To edit the confidence score threshold value, click **Edit Settings** (1). Enter a threshold value in the Confidence Score Threshold field (2). The default value is 0.

The updated settings apply to all the field mappings.

Candidate Patient Object Is No More

The Candidate Patient custom object is being retired. Users are no longer able to create new records in this object. Consider using Lead instead.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: We recommend that you use the Lead object in place of the Candidate Patient object. If your organization needs a field in Candidate Patient that isn't supported by Lead, we recommend creating fields as needed.

Replacing the EHR Data Model with the Clinical Data Model

Starting with the Winter '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart objects in the FHIR R4-aligned Clinical data model. Future development in Health Cloud will be built on the Clinical data model and won't use the packaged objects in the EHR data model.

Where: This change applies to Enterprise and Unlimited editions of Salesforce where Health Cloud is enabled.

How: We recommend that you use the Clinical data model for your implementation of Health Cloud. You can take a look at the Health Cloud developer guide to find out how objects and fields in the EHR data model map to objects and fields in the Clinical data model.

SEE ALSO:

[Health Cloud Developer Guide: Mapping the EHR Data Model to the Clinical Data Model](#)

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

Where: This change applies to Enterprise and Unlimited editions.

Provider Network Management

Set up unique tiers for each provider network

Use the new `ProviderNetworkTier` object.

Associate providers and facilities participating in a network with a contract

Use the new `ProviderNetworkContract` object.

Associate a healthcare facility with a healthcare practitioner facility

Use the new `HealthcareFacilityId` field in the `HealthcarePractitionerFacility` object.

Associate a healthcare provider with a healthcare practitioner facility

Use the new `HealthcareProviderId` field in the `HealthcarePractitionerFacility` object.

Associate a healthcare facility with a facility network

Use the new `HealthcareFacilityId` field in the `HealthcareFacilityNetwork` object.

Associate a healthcare provider with a facility network

Use the new `HealthcareProviderId` field in the `HealthcareFacilityNetwork` object.

Specify a network tier for a facility network

Use the new `ProviderNetworkTierId` field in the `HealthcareFacilityNetwork` object.

Reference an association of a provider, a network, and a contract with a facility

Use the new `ProviderNetworkContractId` field in the `HealthcareFacilityNetwork` object.

Specify the line of business of a payer network

Use the new `LineofBusiness` picklist in the `HealthcarePayerNetwork` object.

Specify the parent healthcare payer network of a healthcare payer network

Use the new `ParentPayerNetworkId` field in the `HealthcarePayerNetwork` object.

Benefit Verification**Submit a request to verify a patient's coverage**

Use the new `CareBenefitVerifyRequest` object.

Set up and configure care benefit verification requests

Use the new `CareBenefitVerifySettings` object.

Define a limit on patient coverage

Use the new `CareLimitType` object.

Check whether a patient benefit can be verified with an external service

Use the new `isVerifiable` field on the `PurchasePlan` object.

Submit a request to verify a patient's coverage

Use the new `CareBenefitVerifyRequest` object.

Submit a request to verify a patient's coverage

Use the new `CareBenefitVerifyRequest` object.

Store information about coverage limits for specific services

Use the new `CoverageBenefitItemLimit` object.

Record general information about a coverage benefit

Use the new `Disclaimers` field on the `CoverageBenefit` object.

Check whether a coverage benefit is currently in force

Use the new `Active` field on the `CoverageBenefit` object.

Specify the general category of service covered under a patient benefit

Use the new `Coverage Type` field on the `CoverageBenefit` object.

Store the date on which the benefit was verified.

Use the new `Verification Date` field on the `CoverageBenefit` object.

Record the first day of the coverage benefit period.

Use the new `Benefit Period Start Date` field on the `CoverageBenefit` object.

Record the last day of the coverage benefit period.

Use the new `Benefit Period End Date` field on the `CoverageBenefit` object.

Check whether a benefit item requires a prior expenditure by the patient.

Use the new `DoesDeductibleApply` field on the `CoverageBenefitItem` object.

Check whether a service must be approved before use.

Use the new `IsPreauthorizationRequired` field on the `CoverageBenefitItem` object.

Verify if a benefit item is currently available.

Use the new `IsActive` field on the `CoverageBenefitItem` object.

Look up the ID of a Code Set Service Type in the Code Set object.

Use the new `CodeSetServiceType` field on the `CoverageBenefitItem` object.

Connect REST API

Patients REST API includes new calls.

Patients

Create a patient record

Make a POST request to the new `/connect/health/patients` resource.

New Request body: FHIR Patient

New response body: Patient Upsert Output

Retrieve details of a patient record

Make a GET request to the new `/connect/health/patients/{patientId}` resource.

New response body: Patient Get Output

Update a patient record

Make a PUT request to the new `/connect/health/patients/{patientId}` resource.

New request body: FHIR Patient

New response body: Patient Update Output

SEE ALSO:

[Health Cloud Developer Guide: Create Patient](#)

Manufacturing Cloud

Develop holistic, accurate, and aligned forecasts to improve revenue, profits, and customer satisfaction. Define sales agreements flexibly with agreements for product categories. Leverage the out-of-the-box Data Processing Engine templates for your account forecast calculations. Do more with Manufacturing Cloud for Service.

IN THIS SECTION:

[Generate Holistic and Accurate Account Forecasts](#)

Develop aligned forecasts to improve revenue, profit, and customer satisfaction. Get forecasts based on opportunities, orders, sales agreements, historical orders, and other custom measures considering all aspects of the business from Salesforce and beyond. With Advanced Account Forecasting, create forecasts across regions, products, product categories, or other custom dimensions in a single instance of Manufacturing Cloud. Use forecast sets to independently configure and manage forecasts for different regions and business units. You can calculate forecasts on a monthly, quarterly, or yearly cadence giving your account managers the flexibility to make forecast adjustments.

[Leverage Data Processing Engine Definitions for Forecast Calculations](#)

For improved productivity and accuracy, use the out-of-the-box Advanced Account Forecast Data Processing Engine templates to calculate account forecasts. You can customize your jobs, generate, regenerate, or recalculate the forecast data, or schedule the Data Processing Engine job to run during rollover at the end of a period.

[Define Sales Agreements Flexibly with Agreements for Product Categories](#)

Now you can create sales agreements for product categories also. It isn't necessary to create separate sales agreements for products that belong to the same product category.

[Do More with Manufacturing Cloud for Service](#)

Use Manufacturing Cloud for Service to automate your workflows across departments and silos and provide your service teams with all the activity, processes, and information they need to resolve cases. Generate more accurate holistic forecasts with predicted volumes and demand based on install base and service consumption. In addition, to refine your customer feedback strategy, you can now get insights directly from your customers at every stage of a relationship.

[New and Changed Objects for Manufacturing Cloud](#)

Do more with these new and changed Manufacturing Cloud objects.

[New and Changed Invocable Actions in Manufacturing Cloud](#)

Use the new and changed invocable actions for Manufacturing Cloud.

[New Action Type Value in Manufacturing Cloud](#)

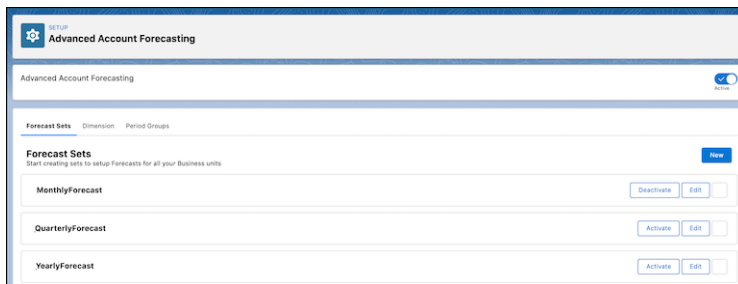
Manufacturing Cloud has a new `actionType` enumeration value.

Generate Holistic and Accurate Account Forecasts

Develop aligned forecasts to improve revenue, profit, and customer satisfaction. Get forecasts based on opportunities, orders, sales agreements, historical orders, and other custom measures considering all aspects of the business from Salesforce and beyond. With Advanced Account Forecasting, create forecasts across regions, products, product categories, or other custom dimensions in a single instance of Manufacturing Cloud. Use forecast sets to independently configure and manage forecasts for different regions and business units. You can calculate forecasts on a monthly, quarterly, or yearly cadence giving your account managers the flexibility to make forecast adjustments.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

How: From Setup, in the Quick Find box, enter *Manufacturing*, and then select **Advanced Account Forecasting**. Create dimensions and period groups, and then create and configure forecast sets.



SEE ALSO:

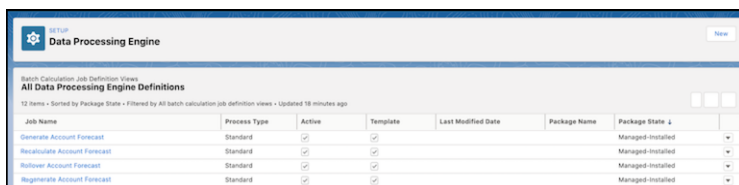
[Salesforce Help: Holistic Forecasts with Advanced Account Forecasting](#)

Leverage Data Processing Engine Definitions for Forecast Calculations

For improved productivity and accuracy, use the out-of-the-box Advanced Account Forecast Data Processing Engine templates to calculate account forecasts. You can customize your jobs, generate, regenerate, or recalculate the forecast data, or schedule the Data Processing Engine job to run during rollover at the end of a period.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

How: From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**. Customize the out-of-the-box templates. Associate the Data Processing Engine templates with forecast sets.



Job Name	Process Type	Active	Template	Last Modified Date	Package Name	Package State
Generate Account Forecast	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Managed-Installed	
Recalculate Account Forecast	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Managed-Installed	
Rollover Account Forecast	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Managed-Installed	
Regenerate Account Forecast	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Managed-Installed	

SEE ALSO:

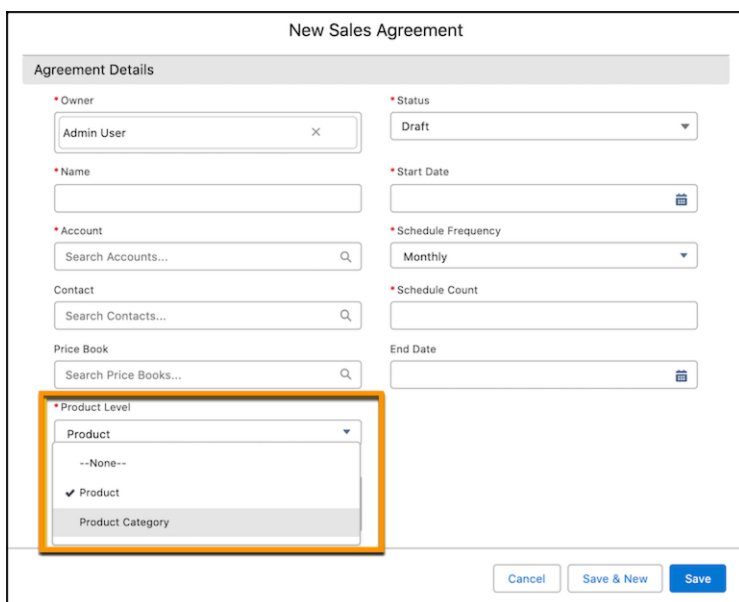
[Salesforce Help: Streamline Calculations with Data Processing Engine Definitions](#)

Define Sales Agreements Flexibly with Agreements for Product Categories

Now you can create sales agreements for product categories also. It isn't necessary to create separate sales agreements for products that belong to the same product category.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

How: Set the product level as Product Category when creating a sales agreement.



New Sales Agreement

Agreement Details

- Owner:** Admin User
- Status:** Draft
- Name:**
- Start Date:**
- Account:** Search Accounts...
- Schedule Frequency:** Monthly
- Contact:** Search Contacts...
- Schedule Count:**
- Price Book:** Search Price Books...
- End Date:**
- Product Level:**
 - Product
 - None--
 - ☒ Product
 - Product Category

Buttons: Cancel, Save & New, Save

SEE ALSO:

[Salesforce Help: Track Sales Compliance with Sales Agreements](#)

Do More with Manufacturing Cloud for Service

Use Manufacturing Cloud for Service to automate your workflows across departments and silos and provide your service teams with all the activity, processes, and information they need to resolve cases. Generate more accurate holistic forecasts with predicted volumes and demand based on install base and service consumption. In addition, to refine your customer feedback strategy, you can now get insights directly from your customers at every stage of a relationship.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

How: For more information about pricing and other details, see <https://www.salesforce.com/products/manufacturing-cloud/pricing/>.

New and Changed Objects for Manufacturing Cloud

Do more with these new and changed Manufacturing Cloud objects.

New Objects

Create advanced account forecast sets

Use the new `AdvAccountForecastSet` object.

Manage advanced account forecast facts

Use the new `AdvAccountForecastFact` object.

Define advanced account forecast measures

Use the new `AdvAcctForecastMeasureDef` object.

Define advanced account forecast dimensions

Use the new `AdvAcctForecastDimSource` and `AdvAcctForecastDimension` objects.

Define advanced account forecast adjustments

Use the new `AdvAcctForecastFactAdj` and `AdvAcctForecastAdjPeriod` objects.

Define advanced account forecast periods

Use the new `AdvAcctForecastPeriodGroup` and `AdvAccountForecastPeriod` objects.

Define advanced account forecast formulas

Use the new `AdvAccountForecastFormula` object.

Define advanced account forecast set partners

Use the new `AdvAcctForecastSetPartner` object.

Updated Objects

Manage sales agreements for product categories

Use the `Product Level` field on the `SalesAgreement` object, the `PlannedAmount` and `ProposedPlannedAmount` fields on the `SalesAgreementProductSchedule` object, and the `ProductCategory` field on the `OrderItem` object.

New and Changed Invocable Actions in Manufacturing Cloud

Use the new and changed invocable actions for Manufacturing Cloud.

Update the status of the Advanced Account Forecast Set Partner record

Use the new `updateAdvancedAccountForecastSetPartner` action.

SEE ALSO:

[Manufacturing Cloud Developer Guide: Manufacturing Cloud Standard Invocable Actions \(can be outdated or unavailable during release preview\)](#)

New Action Type Value in Manufacturing Cloud

Manufacturing Cloud has a new `actionType` enumeration value.

Update the status of the Advanced Account Forecast Set Partner record in Flows

Use the new `updateAdvancedAccountForecastSetPartner` value in the existing `actionType` field on the `FlowActionCall` subtype of the Flow metadata type.

Public Sector Solutions

Perform your inspection visits virtually and efficiently by using the Inspection Management desktop app. Create and use permission sets to give your employees access to Public Sector objects and data.

IN THIS SECTION:

[Complete Inspections Virtually with the Inspection Management Desktop App](#)

Field inspectors can now conduct inspections virtually with the Public Sector: Inspection Management desktop app. Similar with mobile app, inspectors can view visit details such as an establishments' location, priority, estimated visit time, and the assessment tasks associated with a visit. While entering their observations, inspectors can also verify the associated regulatory codes and attach files.

[Empower Your Employees with the Employee Experience for Public Sector Permission Set](#)

Grant your employees access to Public Sector objects and features with the Employee Experience for Public Sector permission set. By unifying data across departments to create a single view of every candidate and employee, government agencies can streamline recruiting, onboarding, talent management, and retention processes of the next generation of service members and civilian employees.

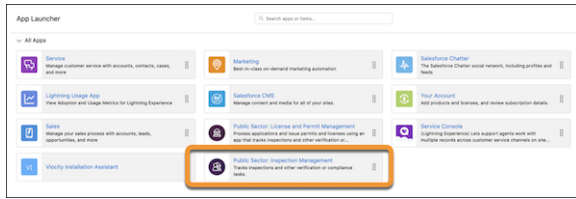
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions are enabled.

Who: To access the Inspection Management desktop app, your users need the `ActionPlans`, `IndustriesVisit`, and `Public Sector Field Access` permission sets.

How: From the App Launcher, inspectors can launch the Public Sector: Inspection Management app to track their inspections and other compliance tasks.



SEE ALSO:

[Salesforce Help: Inspection Management Desktop App \(can be outdated or unavailable during release preview\)](#)

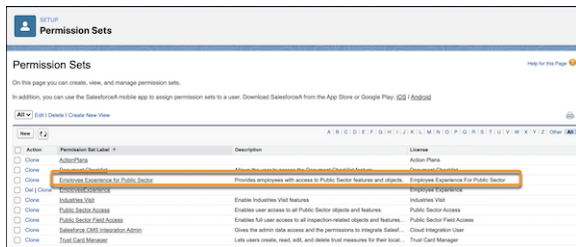
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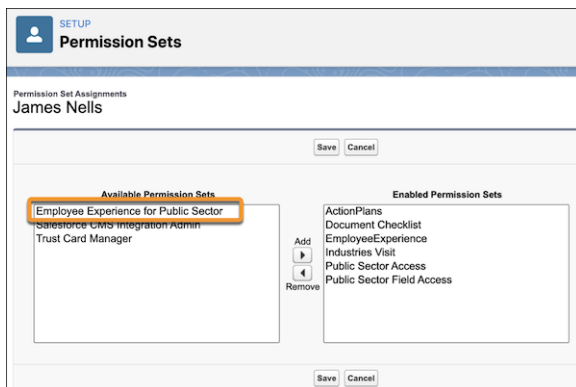
Who: To access Public Sector objects and features, your employees need the Employee Experience for Public Sector permission set.

How: From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**. Click the **Employee Experience for Public Sector** permission set.



To assign employees a permission set, use one of these methods:

- To assign access to multiple employees at the same time, click **Manage Assignments** > **Add Assignments**. Choose the employees you want to add, and then click **Assign**.
- To assign access to employees individually, from Setup, in the Quick Find box, enter *Users*, and then select **Users**. Search for an employee and click on their profile to assign a permission set. On the Permission Set Assignments section, click **Edit**, and then move the Employee Experience for Public Sector permission set to the Enabled Permission Sets column.



To give more employees access to an existing permission set, clone the permission set, and then add more employees to the cloned set.

SEE ALSO:

[Salesforce Help: Public Sector Solutions Permission Sets \(can be outdated or unavailable during release preview\)](#)

Rebate Management

Manage products for program rebate types easily with new features and enhancements. Do more with the new and enhanced out-of-the-box Data Processing Engine templates.

IN THIS SECTION:

[Define Product-Based Eligibility Easily and Quickly with Product Filter Type on Program Rebate Type](#)

Manage products for program rebate types easily with new features and enhancements. Use product list views to include or exclude products for a program rebate type, or use an API. When calculating the rebate amounts for a program rebate type, transactions are filtered based on your selection.

[Do More with the New and Enhanced Template Data Processing Engine Definitions](#)

Rebates Data Processing Engine templates are renamed to clearly indicate their purpose. A new Data Processing Engine template called Aggregate by Account was added to allow transactions to be attributed to an account instead of a rebate program member. Your account managers can use the enhanced Data Processing Engine templates to process rebate amounts by including or excluding transactions with products based on a new Product Filter Type field on Program Rebate Type.

[Rebate Analytics](#)

Get insights into purchases and incentives to drive partner sales. View accruals for a rebate program and plan your financials.

[New and Changed Objects for Rebate Management](#)

Do more with these new and changed Rebate Management objects.

[New and Changed Invocable Actions in Rebate Management](#)

Use the new and changed invocable actions for Rebate Management.

[New Action Type Value in Rebate Management](#)

Rebate Management has a new `actionType` enumeration value.

Define Product-Based Eligibility Easily and Quickly with Product Filter Type on Program Rebate Type

Manage products for program rebate types easily with new features and enhancements. Use product list views to include or exclude products for a program rebate type, or use an API. When calculating the rebate amounts for a program rebate type, transactions are filtered based on your selection.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: When creating a program rebate type, select a product filter type. Then add the products that you want to include or exclude from the list.

New Program Rebate Type

Information

Name

Volume rebate for Radius products

Status

Active

Rebate Program

RP1

Integratable

Product Filter Type

--None--

--None--

Include Products

Exclude Products

Calculation Type

Per Transaction

Calculation Definition

Aggregate by Member2

Aggregation Object

Rebate Member Product Aggregate

Benefit Information

Measure Type

Measure Field

Cancel

Save & New

Save

SEE ALSO:

[Salesforce Help: Define Product Eligibility for Rebate Types](#)

Do More with the New and Enhanced Template Data Processing Engine Definitions

Rebates Data Processing Engine templates are renamed to clearly indicate their purpose. A new Data Processing Engine template called Aggregate by Account was added to allow transactions to be attributed to an account instead of a rebate program member. Your account managers can use the enhanced Data Processing Engine templates to process rebate amounts by including or excluding transactions with products based on a new Product Filter Type field on Program Rebate Type.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: Activate the out-of-the-box Data Processing Engine jobs, or use the existing templates to create and run your own jobs.

SETUP

Data Processing Engine

New

Batch Calculation Job Definition Views

All Data Processing Engine Definitions

13 Items • Sorted by Process Type • Filtered by All batch calculation job definition views • Updated a few seconds ago

Job Name	Process Type	Active	Template	Last Modified Date	Package No.	Package State
Ship And Debit Program Aggregate using Member	Rebates	✓	✓			Managed-Installed
Process Per Transaction using Member	Rebates	✓	✓			Managed-Installed
Year over Year Growth Aggregate using Member	Rebates	✓	✓			Managed-Installed
Aggregate by Product and Member	Rebates	✓	✓			Managed-Installed
Account Hierarchy Aggregate using Member	Rebates	✓	✓			Managed-Installed
Aggregate by Member	Rebates	✓	✓			Managed-Installed
Aggregate by Account	Rebates	✓	✓			Managed-Installed
Insert Orders To Journals with Member	Standard	✓	✓			Managed-Installed

SEE ALSO:

[Salesforce Help: Streamline Calculations with Data Processing Engine Definitions](#)

Rebate Analytics

Get insights into purchases and incentives to drive partner sales. View accruals for a rebate program and plan your financials.

393

IN THIS SECTION:

Get Business Insights to Drive Partner Sales

Improve your business by using the Partner Insights dashboard to get insights into purchases and incentives. Analyze order data and plan your business better. Get visibility into current period payouts and effectively manage your financials. Identify purchases required to maximize your rebate earnings. You can also embed this dashboard on an Experience Cloud site.

Track Your Accruals

Use the enhanced Rebate Program Embedded dashboard to view the accruals for a rebate program and plan your financials better.

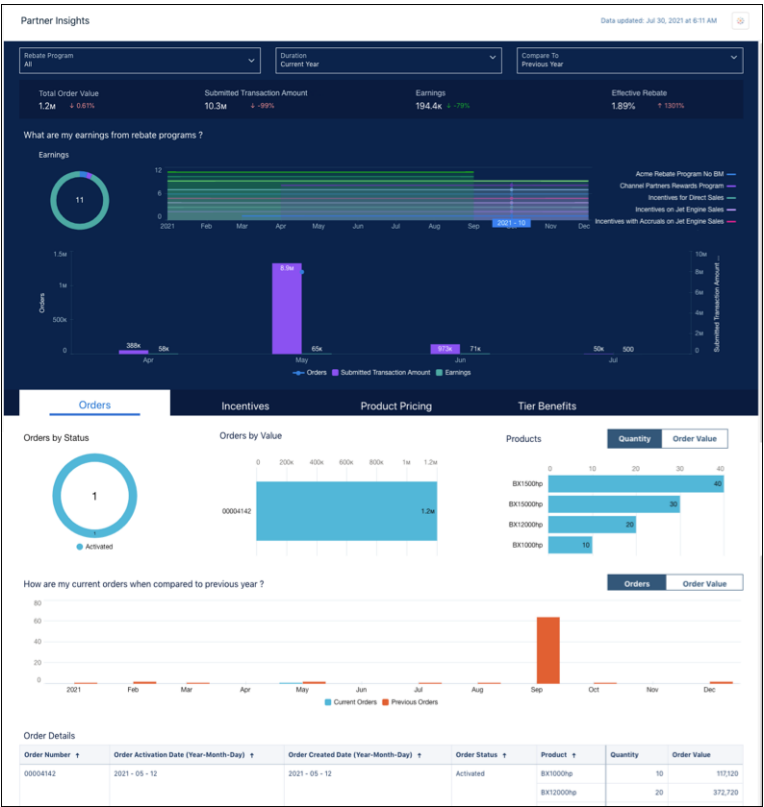
Get Business Insights to Drive Partner Sales

Improve your business by using the Partner Insights dashboard to get insights into purchases and incentives. Analyze order data and plan your business better. Get visibility into current period payouts and effectively manage your financials. Identify purchases required to maximize your rebate earnings. You can also embed this dashboard on an Experience Cloud site.

Where: This change applies to Tableau CRM in Lightning Experience and all versions of the Salesforce app in Enterprise, Unlimited, and Developer editions.

Who: To use the Rebate Analytics dashboards, you need Rebate Management, Rebate Management User, and Manufacturing Analytics Plus add-on licenses. To embed the Partner Insights dashboard on an Experience Cloud site, you need the Rebate Management for Experience Cloud Users and TCRM for Communities permission sets.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App > Analytics for Manufacturing**. Follow the instructions



in the wizard to create your app.

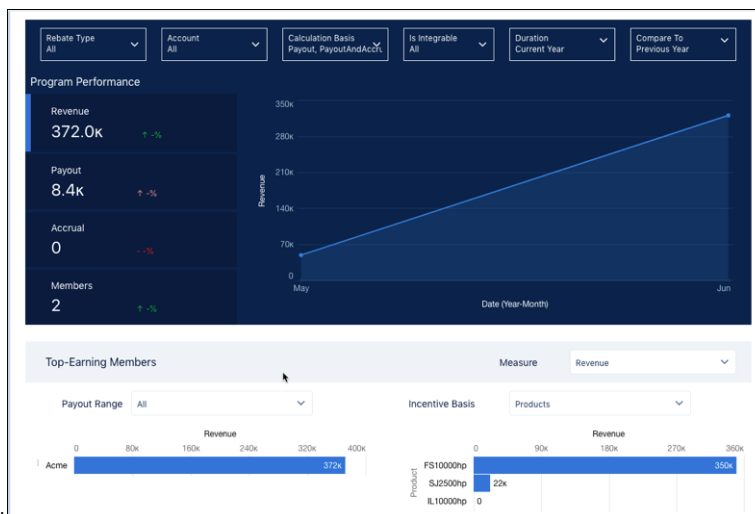
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Where: This change applies to Tableau CRM in Lightning Experience and all versions of the Salesforce app in Enterprise, Unlimited, and Developer editions.

Who: To use the Rebate Analytics dashboards, you need Rebate Management, Rebate Management User, and Manufacturing Analytics Plus add-on licenses.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App > Analytics for Manufacturing**. Follow the instructions



in the wizard to create your app.

New and Changed Objects for Rebate Management

Do more with these new and changed Rebate Management objects.

New Object

Define program rebate type products

Use the new `ProgramRebateTypeProduct` object.

Updated Objects

Define included or excluded products for program rebate types

Use the `ProductFilterType` field on the `ProgramRebateType` object.

New and Changed Invocable Actions in Rebate Management

Use the new and changed invocable actions for Rebate Management.

Insert or delete records in the Program Rebate Type Product Object

Use the new `processProgramRebateTypeProducts` action.

SEE ALSO:

[Rebate Management Developer Guide: Rebate Management Standard Invocable Actions](#)

New Action Type Value in Rebate Management

Rebate Management has a new `actionType` enumeration value.

Insert or delete records in the Program Rebate Type Product object

Use the new `processProgramRebateTypeProducts` value for the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

Loyalty Management

Let members pool points in groups. Hold a member's points in escrow for a period. Update member's points balance immediately after points are credited. Offer members promotions that match their profile and activities. Flexibly manage vouchers. Use content blocks in Marketing Cloud to send personalized emails. Trigger business processes with transaction journals.

IN THIS SECTION:

[Member Groups](#)

Increase your loyalty program adoption by creating groups and adding a member's friends and family into the member's loyalty program. You can automatically transfer non-qualifying points from a member's balance to the group's balance based on their contribution percentage for a group. A group's balance updates automatically when a member's balance changes. Members can redeem points through their groups.

[Escrow Points](#)

Keep the points allocated for a member's transaction on hold for a specified period. Roll over escrow points to a member's balance after the escrow period ends.

[Reward Members at the Time of Activity](#)

Members' nonqualifying points balance automatically update when points are credited manually or through the Credit Points action. To update member points balance, it's not necessary to run the Credit Non-Qualifying Points to Members Data Processing Engine definition.

[Promotion Management](#)

Decide which promotions to offer to a member or for a transaction. Automate the process of updating members' progress on a cumulative promotion.

[Voucher Management](#)

Give more flexibility to members and users who manage vouchers. A member can choose to redeem a voucher in multiple transactions. You can determine the value of a voucher while you issue the voucher.

[Marketing Cloud Integration](#)

Use content blocks to send contextual emails to members.

[Trigger Automated Process Using Transaction Journals](#)

Trigger business processes in Flows and Process Builder when Transaction Journal records are created or updated. Whenever transaction journals are created or updated, you can trigger processes such as crediting points, updating other records, or sending the member an email.

[Simplify the Tier Model Setup](#)

Added validations align tier group settings with both fixed tier and anniversary tier models. They allow you to specify the tier period as months or years, thus simplifying the tier assessment process. For anniversary model tiers, you can align a member's tier expiration date with their enrollment anniversary. For fixed model tiers, you can align the tier expiration date with the member's qualifying points reset date. The points for fixed model tiers are then reset in years.

[Start Your Journey with the Loyalty Management Learning Map](#)

Take the path to success with the Salesforce Loyalty Management learning map. The learning map guides you through every step of your journey from creating a loyalty program with targeted resources to running the program. Find articles, help topics, and Trailhead modules in one place, and get your loyalty program up and running in no time!

[Analytics for Loyalty](#)

Get insights into your program's revenue and view the liability forecast. Use the Predictions for Promotion Revenue app to get predictions on promotion revenue.

[New and Changed Objects in Loyalty Management](#)

Do more with the new and updated Loyalty Management objects.

[New and Changed Invocable Actions in Loyalty Management](#)

Use the new and changed invocable actions for Loyalty Management.

[New Action Type Value in Loyalty Management](#)

Loyalty Management has a new `actionType` enumeration value.

[Connect REST API](#)

Loyalty Management REST API includes changed call.

[Apex: New Items in Loyalty Management](#)

These classes are new.

Member Groups

Increase your loyalty program adoption by creating groups and adding a member's friends and family into the member's loyalty program. You can automatically transfer non-qualifying points from a member's balance to the group's balance based on their contribution percentage for a group. A group's balance updates automatically when a member's balance changes. Members can redeem points through their groups.

IN THIS SECTION:

[Grow Your Loyalty Program with Group Memberships](#)

Members often join a loyalty program with their friends and family. Create a Group type membership, and add Individual or Corporate type members to it. Members of a group can pool their nonqualifying points and redeem points from the pool.

[Set Up a One-Time Process to Transfer Points](#)

To automate the transfer of non-qualifying points from a member's point balance to the member's group, use the new Transfer Member Points to Groups action in Flows. The action automatically picks up the member's contribution percentage for associated groups and then transfers the points.

[Get a Snapshot of the Points Transferred by a Member](#)

Easily track the number of points transferred by members to their groups for each of their accrual transactions. The Additional Notes field of the Transfer type Loyalty Ledger records shows the number of points transferred to the member's groups.

[Keep Your Group Balances Up to Date](#)

The point balances of a group automatically update when you adjust a member's non-qualifying points or reverse a transaction. After considering a member's group transfer pattern, the Data Processing Engine definitions provided with Loyalty Management ensure that non-qualifying points are either credited or expire. Non-qualifying points pooled in a group also expire when the currency is eligible for expiration.

[View Points Transferred to a Group](#)

Track points that are credited to or debited from a group using the Transaction Journal related list on the group's Loyalty Program Member record. To transfer a member's points to a group, an Accrual type transaction journal is created for the group. Reversal or adjustment of points of a member's transaction creates Manual Adjustment type transaction journals for the group.

[Keep Members Plugged Into Their Groups](#)

Give your members easy access to information about their groups when you create a site using the Loyalty Member Portal template. Members can also view details such as the number of points that they transfer to the group and the group's current balance.

Grow Your Loyalty Program with Group Memberships

Members often join a loyalty program with their friends and family. Create a Group type membership, and add Individual or Corporate type members to it. Members of a group can pool their nonqualifying points and redeem points from the pool.

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

How: Create a Loyalty Program Member record and select the Member Type as Group. Specify the group's membership number, enrollment date, and associated loyalty program. In the Group Created By field, select the member who requested the group to be created, and save your changes. From the Group Members related list, click **Add Member to Group** to add a member.

SEE ALSO:

[Salesforce Help: Create Member Groups \(can be outdated or unavailable during release preview\)](#)

Set Up a One-Time Process to Transfer Points

To automate the transfer of non-qualifying points from a member's point balance to the member's group, use the new Transfer Member Points to Groups action in Flows. The action automatically picks up the member's contribution percentage for associated groups and then transfers the points.

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

How: The action uses Transaction Journal records of Accrual type as input. Non-qualifying points are transferred to the groups of the member associated with the Transaction Journal records. The action transfers points only from the Credit type Loyalty Ledger records associated with the transaction journal. To transfer the points, the action creates ledger records. Each ledger record debits points for one non-qualifying currency. The action credits points to the group by using a Transaction Journal record that's created and associated with the group's Loyalty Program Member record.

In a flow, drag the **Action** element to the canvas. Select the Category as **Loyalty**. Search and select **Transfer Member Points to Groups**. In the Journal ID field, enter the transaction journal ID or use a resource to automatically populate transaction journal IDs from previous elements in the flow.

New Action

Filter By
Category ▼

- All
- Users
- Group
- Loyalty
- Task
- Price books
- Feed Item
- Data Processing Engine
- Case
- Account
- Contact

Action
Transfer Member Points to Groups

Use values from earlier in the flow to set the inputs for the "Transfer Member Points to Groups" core action. To use its outputs later in the flow, store them in variables.

* Label
Transfer to Member Groups

* API Name
Transfer_to_Member_Groups

Description
This action transfers points from the members' point balance to the members' associated groups.

Set Input Values

A₃ * Journal ID
{!Credit_Points_for_Pending_Transaction_Jour}

Cancel Done

SEE ALSO:

[Salesforce Help: Transfer Member Points to Groups \(can be outdated or unavailable during release preview\)](#)

Get a Snapshot of the Points Transferred by a Member

Easily track the number of points transferred by members to their groups for each of their accrual transactions. The Additional Notes field of the Transfer type Loyalty Ledger records shows the number of points transferred to the member's groups.

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

How: From the App Launcher, search and select **Loyalty Management**. Open the loyalty program that the member is associated with. From the Loyalty Program Members related list, open the member's record. From the Transaction Journal related list, open the Transaction Journal record for which points were transferred. From the Loyalty Ledger related list, click **View All**.

Loyalty Ledgers

Loyalty Ledgers

2 items • Sorted by Name • Filtered by All loyalty ledgers - Additional Notes, Loyalty Program Currency • Updated a few seconds ago

	Name ↑	Membership Num...	Loyalty Program Currency	Event Type	Points	Additional Notes
1	00000067	ManjeevSingh	Activity Points	Debit	10.00	Transferred non-qualifying type points to the associated member's groups. The points transferred to each group are:10 points to Sahni's Family group
2	00000079	ManjeevSingh	Activity Points	Debit	50.00	Transferred non-qualifying type points to the associated member's groups. The points transferred to each group are:50 points to Sahni's Family group

Keep Your Group Balances Up to Date

The point balances of a group automatically update when you adjust a member's non-qualifying points or reverse a transaction. After considering a member's group transfer pattern, the Data Processing Engine definitions provided with Loyalty Management ensure that non-qualifying points are either credited or expire. Non-qualifying points pooled in a group also expire when the currency is eligible for expiration.

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

SEE ALSO:

[Salesforce Help: Learn How a Group's Point Balances Are Managed \(can be outdated or unavailable during release preview\)](#)

View Points Transferred to a Group

Track points that are credited to or debited from a group using the Transaction Journal related list on the group's Loyalty Program Member record. To transfer a member's points to a group, an Accrual type transaction journal is created for the group. Reversal or adjustment of points of a member's transaction creates Manual Adjustment type transaction journals for the group.

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

How: From the App Launcher, search and select **Loyalty Management**. Open the loyalty program that the group is associated with. From the Loyalty Program Members related list, open the group's record. From the Transaction Journal related list, click **View All**. To view the points credited or debited for each non-qualifying currency per transaction, open a Transaction Journal record. To view the details of the points credited or debited for each non-qualifying currency, see the Loyalty Ledger related list.

Keep Members Plugged Into Their Groups

Give your members easy access to information about their groups when you create a site using the Loyalty Member Portal template. Members can also view details such as the number of points that they transfer to the group and the group's current balance.

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

How: To see which groups they're part of, members can look at the Associated Groups related list on the Related tab of the member's record. To view details, members can click the name of the group on the Associated Groups related list. A member can view the number of points that they transferred to a group for an activity. To view the points, the member can open the record of that activity from the Transaction Journals related list.

Escrow Points

Keep the points allocated for a member's transaction on hold for a specified period. Roll over escrow points to a member's balance after the escrow period ends.

IN THIS SECTION:

[Keep Member Points in Escrow Until a Transaction Is Completed](#)

Reward members after an activity's lifecycle is completed. And reduce complicated point adjustment calculations whenever a member cancels an activity. Keep member points in escrow for a specific period. Points are automatically transferred to a member's point balance when the escrow period is over. For example, you can hold a member's points in escrow until the return period for an order is complete. If the member returns or cancels the order before the escrow period is over, points are automatically removed from the escrow balance. Multiple currencies in your loyalty program can hold points in escrow.

[Release a Member's Points from Escrow Automatically](#)

Automatically roll over a member's points from their escrow point balance to their point balance after a transaction's escrow period is over. Make a copy of the Roll Over Escrow Points to Members Data Processing Engine template definition, and then run the template to roll over the members' points.

[Easily Track a Member's Escrow Points](#)

On the Loyalty Program Member record of a member, see the member's escrow points in the Loyalty Member Currency related list. You can view the number of points the member has in escrow for all the associated currencies.

[Override the Escrow Period for Transactions](#)

You can now ignore the escrow period while crediting points to members for transactions. For example, you can override the escrow period and credit points to members for orders that don't have a return period. To ignore the escrow period, in the Escrow Points Credit Date field of a Transaction Journal record, specify the date to credit points. On the specified date, points are rolled over to the member's point balance.

[Use Updated Flow Actions to Easily Process Escrow Points](#)

The Credit Points action now moves points to the member's escrow balance in real-time based on whether the associated currency has escrow. The Get Member Points Balance action also provides the escrow points balance as an output.

Keep Member Points in Escrow Until a Transaction Is Completed

Reward members after an activity's lifecycle is completed. And reduce complicated point adjustment calculations whenever a member cancels an activity. Keep member points in escrow for a specific period. Points are automatically transferred to a member's point balance when the escrow period is over. For example, you can hold a member's points in escrow until the return period for an order is complete. If the member returns or cancels the order before the escrow period is over, points are automatically removed from the escrow balance. Multiple currencies in your loyalty program can hold points in escrow.

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

How: In the Escrow Period field of a Loyalty Program record, specify the number of days to hold points in escrow for the program's currencies. When creating a Loyalty Program Currency record, select **Has Escrow** to hold member's points of this currency type in escrow.

New Loyalty Program

Loyalty Program Details

* Program Name: Corporate Loyalty Program

* Status: Active

Description:

Primary: ☒

Escrow Period: 10

New Loyalty Program Currency

Currency Details

* Currency Name: Regular Points

* Currency Type: Non-Qualifying

Active: ☒

* Loyalty Program: Corporate Loyalty Program

Primary: ☐

Has Escrow: ☒

SEE ALSO:

[Salesforce Help: Create a Loyalty Program \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Loyalty Program Currency \(can be outdated or unavailable during release preview\)](#)

Release a Member's Points from Escrow Automatically

Automatically roll over a member's points from their escrow point balance to their point balance after a transaction's escrow period is over. Make a copy of the Roll Over Escrow Points to Members Data Processing Engine template definition, and then run the template to roll over the members' points.

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

How: From Setup, search and select **Data Processing Engine**. Open the Roll Over Escrow Points to Members template definition. Click **Save As**. Enter a name and API name of the copy, and then save your changes.

SEE ALSO:

[Salesforce Help: Roll Over Escrow Points to Members \(can be outdated or unavailable during release preview\)](#)

Easily Track a Member's Escrow Points

On the Loyalty Program Member record of a member, see the member's escrow points in the Loyalty Member Currency related list. You can view the number of points the member has in escrow for all the associated currencies.

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

Loyalty Member Currency (1)			
Name	Loyalty Program Currency	Points Balance	Escrow Points Balance
Regular Points	Regular Points	0.00	150.00
View All			

Override the Escrow Period for Transactions

You can now ignore the escrow period while crediting points to members for transactions. For example, you can override the escrow period and credit points to members for orders that don't have a return period. To ignore the escrow period, in the Escrow Points Credit Date field of a Transaction Journal record, specify the date to credit points. On the specified date, points are rolled over to the member's point balance.

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

SEE ALSO:

[Salesforce Help: Understand How Escrow Points Work \(can be outdated or unavailable during release preview\)](#)

Use Updated Flow Actions to Easily Process Escrow Points

The Credit Points action now moves points to the member's escrow balance in real-time based on whether the associated currency has escrow. The Get Member Points Balance action also provides the escrow points balance as an output.

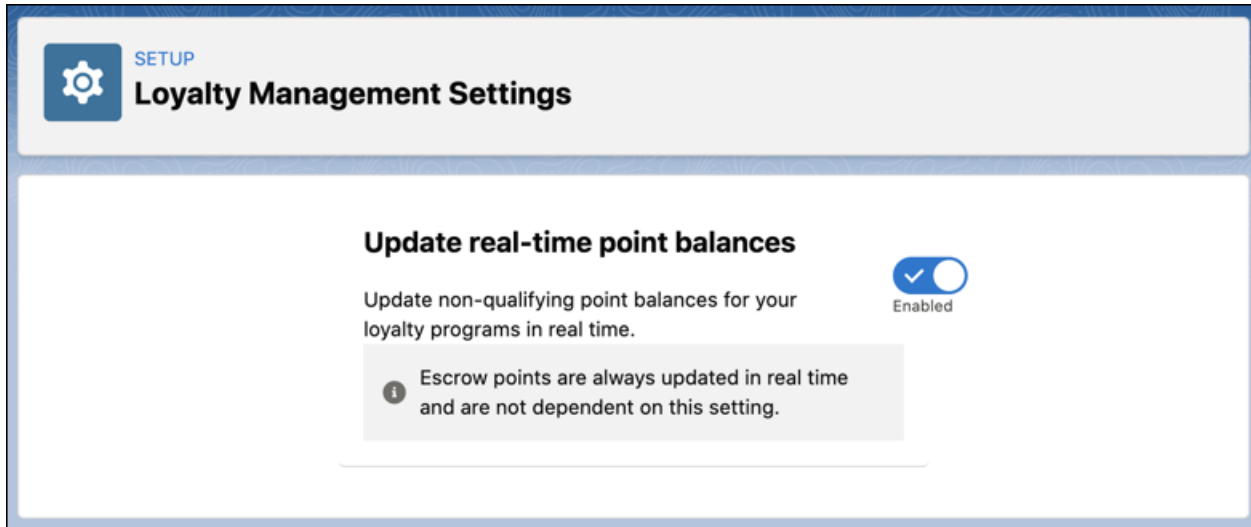
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is enabled.

Reward Members at the Time of Activity

Members' nonqualifying points balance automatically update when points are credited manually or through the Credit Points action. To update member points balance, it's not necessary to run the Credit Non-Qualifying Points to Members Data Processing Engine definition.

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

How: In Setup, search and select **Loyalty Management Setting**. Turn on **Update point balances in real-time**.



SEE ALSO:

[Salesforce Help: Enable Real-Time Update of Non-Qualifying Points Balance \(can be outdated or unavailable during release preview\)](#)

Promotion Management

Decide which promotions to offer to a member or for a transaction. Automate the process of updating members' progress on a cumulative promotion.

IN THIS SECTION:

[Determine Applicable Promotions for a Transaction](#)

To determine which promotions work for Accrual or Redemption type transactions, use the Get Loyalty Promotions for Transactions action instead of using multiple elements in a flow.

[Get Promotions That Fit a Member Best](#)

Find out which promotions are best suited for members based on the Salesforce CDP market segment the member belongs to. The Get Loyalty Promotions for Salesforce CDP action in Flows shows a list of promotions associated with the market segment that a member is associated with.

[Update Member Progress Towards Unlocking a Promotion](#)

Use the Update Progress For Cumulative Promotion action in Flows to easily update a member's progress towards attaining a cumulative promotion. The action either adds the change in usage to the member's cumulative promotion record or creates a Loyalty Program Member Promotion record.

[Update a Member's Progress Easily](#)

The Apply Promotions Flows template now uses the Update Progress For Cumulative Promotion action. This action makes updating a member's progress towards achieving a cumulative promotion easy. The Flows template either credits points or issues a voucher to the member based on the standard or cumulative promotion's fulfillment action.

Determine Applicable Promotions for a Transaction

To determine which promotions work for Accrual or Redemption type transactions, use the Get Loyalty Promotions for Transactions action instead of using multiple elements in a flow.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the B2C - Loyalty or the B2C - Loyalty Plus license is enabled.

How: In a flow, drag the Action element on to the canvas. Select the Category as **Loyalty**. Search and select **Get Loyalty Promotions for Transactions**. In the JournalId field, either enter the transaction journal ID or use a resource to automatically populate transaction journal IDs from previous elements in the flow.

SEE ALSO:

[Salesforce Help: Get a List of Promotions Applicable for a Transaction \(can be outdated or unavailable during release preview\)](#)

[Loyalty Management Developer Guide: getLoyaltyPromotion Invocable Action \(can be outdated or unavailable during release preview\)](#)

Get Promotions That Fit a Member Best

Find out which promotions are best suited for members based on the Salesforce CDP market segment the member belongs to. The Get Loyalty Promotions for Salesforce CDP action in Flows shows a list of promotions associated with the market segment that a member is associated with.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the B2C - Loyalty or the B2C - Loyalty Plus license and Salesforce CDP are enabled.

How: In a flow, drag the Action element on to the canvas. Select the Category as **Loyalty**. Search and select **Get Loyalty Promotions for Salesforce CDP**. In the MemberId field, either enter the member ID or use a resource to automatically populate member IDs from previous elements in the flow.

SEE ALSO:

[Salesforce Help: Get a List of Promotions Applicable for a Member \(can be outdated or unavailable during release preview\)](#)

[Loyalty Management Developer Guide: getLoyaltyPromotionBasedOnSalesforceCDP Invocable Action \(can be outdated or unavailable during release preview\)](#)

Update Member Progress Towards Unlocking a Promotion

Use the Update Progress For Cumulative Promotion action in Flows to easily update a member's progress towards attaining a cumulative promotion. The action either adds the change in usage to the member's cumulative promotion record or creates a Loyalty Program Member Promotion record.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the B2C - Loyalty or the B2C - Loyalty Plus license is enabled.

How: In a flow, drag the Action element on to the canvas, and select the Category as **Loyalty**. Search and select **Update Progress For Cumulative Promotion**. Specify the promotion ID, the member ID, and the value to add to the member's cumulative usage.

SEE ALSO:

[Salesforce Help: Update Member's Progress Toward Attaining a Cumulative Promotion \(can be outdated or unavailable during release preview\)](#)

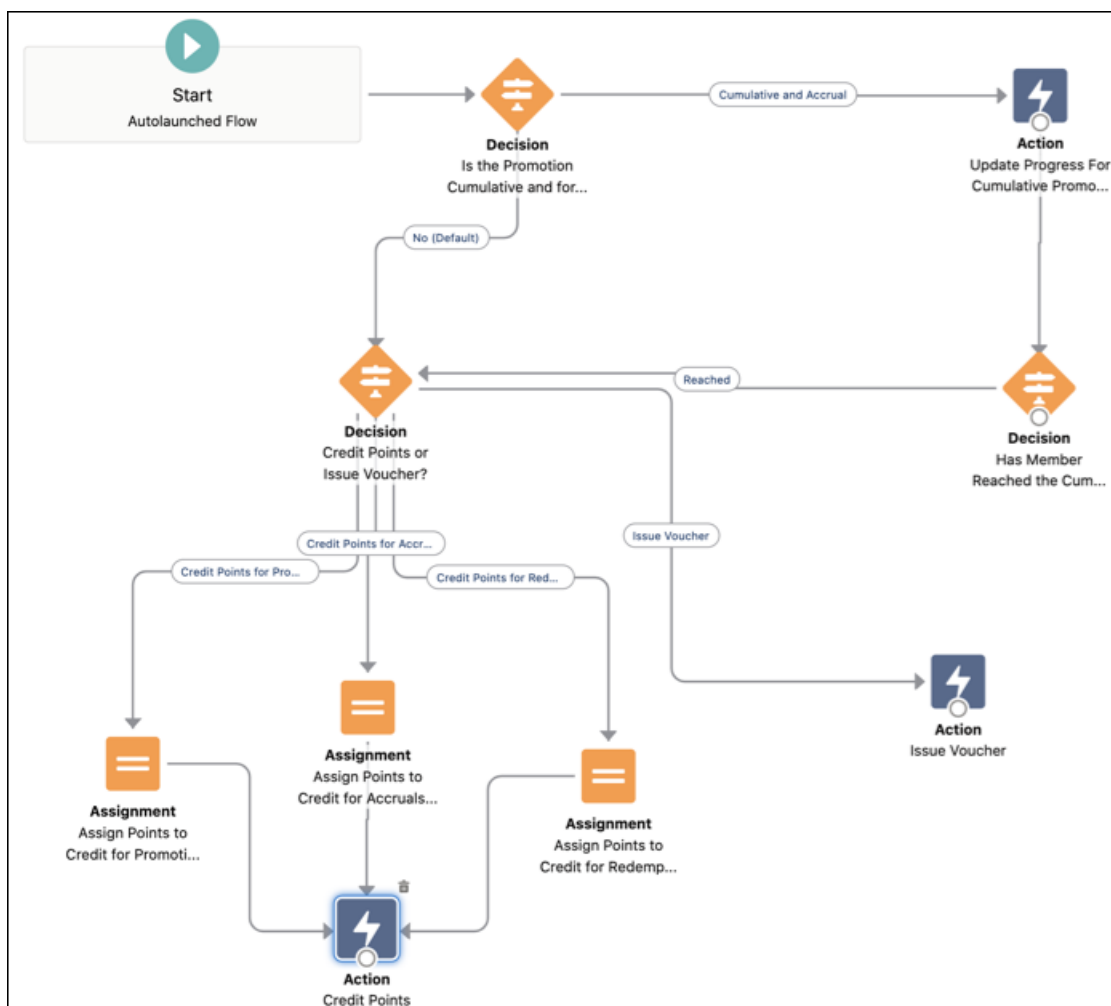
[Loyalty Management Developer Guide: updateProgressForCumulativePromotionUsage Invocable Action \(can be outdated or unavailable during release preview\)](#)

Update a Member's Progress Easily

The Apply Promotions Flows template now uses the Update Progress For Cumulative Promotion action. This action makes updating a member's progress towards achieving a cumulative promotion easy. The Flows template either credits points or issues a voucher to the member based on the standard or cumulative promotion's fulfillment action.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the B2C - Loyalty or the B2C - Loyalty Plus license is enabled.

How: To use the updated Apply Promotions Flow template, open the template. Click **Save As**, and then create a flow using the template.



SEE ALSO:

[Salesforce Help: Create a Flow for Applying a Promotion \(can be outdated or unavailable during release preview\)](#)

Voucher Management

Give more flexibility to members and users who manage vouchers. A member can choose to redeem a voucher in multiple transactions. You can determine the value of a voucher while you issue the voucher.

IN THIS SECTION:

[Give Members Flexibility to Use a Voucher Across Multiple Activities](#)

Issue partially redeemable vouchers to enable members to use a voucher over multiple transactions. You can track the amount spent and the amount remaining on the voucher.

[Personalize the Value of Vouchers](#)

You can now determine a voucher's value or discount percentage while issuing the voucher. You can decide the voucher value based on why, when, and to who you issue the voucher to, or on the value of the transaction the voucher is issued for. For example, for a delayed shipment, you can offer members a 5% discount on their next purchase. But for a different business scenario, such as receiving an incorrect order, you can offer a member a 10% discount on the same voucher.

[Recall Vouchers for Reversed Transactions](#)

When you reverse a transaction, the associated vouchers are automatically canceled. But already redeemed vouchers can't be canceled even after you reverse the transaction.

Give Members Flexibility to Use a Voucher Across Multiple Activities

Issue partially redeemable vouchers to enable members to use a voucher over multiple transactions. You can track the amount spent and the amount remaining on the voucher.

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

How: When creating a Fixed Value type voucher definition, select **Partial Redeemable**. After issuing a partially redeemable voucher, use the Redeemed Value and Remaining Value fields in the Voucher record to track the voucher's usage across transactions.

The screenshot shows the 'New Voucher Definition' form in Salesforce. The form is titled 'New Voucher Definition' and has a section 'Voucher Definition Details'. The form contains several fields and checkboxes:

- Name:** 'Get \$100 off on your future purcha'
- Type:** 'Fixed Value' (dropdown menu)
- Description:** 'Members can redeem this voucher across multiple purchases.'
- Active:** ☐
- Partner:** 'Search Accounts...'
- Product:** 'Search Categories...'
- Discount Percentage:** (empty field)
- Face Value:** '\$100.00'
- Expiration Type:** 'Fixed Date' (dropdown menu)
- Cost Per Voucher:** '\$100.00'
- Expiration Date:** '11/30/2021' (calendar icon)
- Effective Date:** '10/31/2021' (calendar icon)
- Expiration Period:** (empty field)
- Partial Redeemable:** ☒ (highlighted with an orange box)

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

SEE ALSO:

[Salesforce Help: Create Voucher Definitions](#) (can be outdated or unavailable during release preview)

Personalize the Value of Vouchers

You can now determine a voucher's value or discount percentage while issuing the voucher. You can decide the voucher value based on why, when, and to who you issue the voucher to, or on the value of the transaction the voucher is issued for. For example, for a delayed shipment, you can offer members a 5% discount on their next purchase. But for a different business scenario, such as receiving an incorrect order, you can offer a member a 10% discount on the same voucher.

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

How: When using the Issue Voucher action in Flows, you can let your business scenario automatically determine the voucher value. On a member's Loyalty Program Member record, click the **Issue Voucher** quick action. Based on the voucher definition that you select, enter either the face value or the discount percentage that you want to offer to the member for the voucher.

SEE ALSO:

[Loyalty Management Developer Guide: Redeem Voucher \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Issue Vouchers to Members \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Issue Vouchers Automatically \(can be outdated or unavailable during release preview\)](#)

Recall Vouchers for Reversed Transactions

When you reverse a transaction, the associated vouchers are automatically canceled. But already redeemed vouchers can't be canceled even after you reverse the transaction.

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

How: From the App Launcher, find and select **Transaction Journals**. Open the transaction journal to reverse. Click **Reverse Transaction**. The transaction journal and the vouchers associated with the transaction are canceled. But a voucher isn't canceled if the voucher's status is Redeemed.

Marketing Cloud Integration

Use content blocks to send contextual emails to members.

IN THIS SECTION:

[Keep Members Informed About Points Earned or Spent](#)

Two new Loyalty Management content blocks in Marketing Cloud enable you to email members about the points that they earned or spent for a transaction. To access the new Loyalty Management content blocks in Marketing Cloud, install the Loyalty Management Content Blocks package. To email details about transactions that members earned points for, use the Loyalty Accrual Transactions content block. To email details about transactions that members spent points for, use the Loyalty Redemption Transactions content block.

[Get an Early Start on Your Tier Upgrade Emails](#)

Email members immediately after upgrading them to a new tier. Use the Loyalty Tier Upgrade content block to personalize emails. To access the Loyalty Management content blocks in Marketing Cloud, install the Loyalty Management Content Blocks package. The content block helps you pull data from your Loyalty Management records to use in your emails or email templates.

Keep Members Informed About Points Earned or Spent

Two new Loyalty Management content blocks in Marketing Cloud enable you to email members about the points that they earned or spent for a transaction. To access the new Loyalty Management content blocks in Marketing Cloud, install the Loyalty Management Content Blocks package. To email details about transactions that members earned points for, use the Loyalty Accrual Transactions content block. To email details about transactions that members spent points for, use the Loyalty Redemption Transactions content block.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have Loyalty Management and Marketing Cloud enabled.

SEE ALSO:

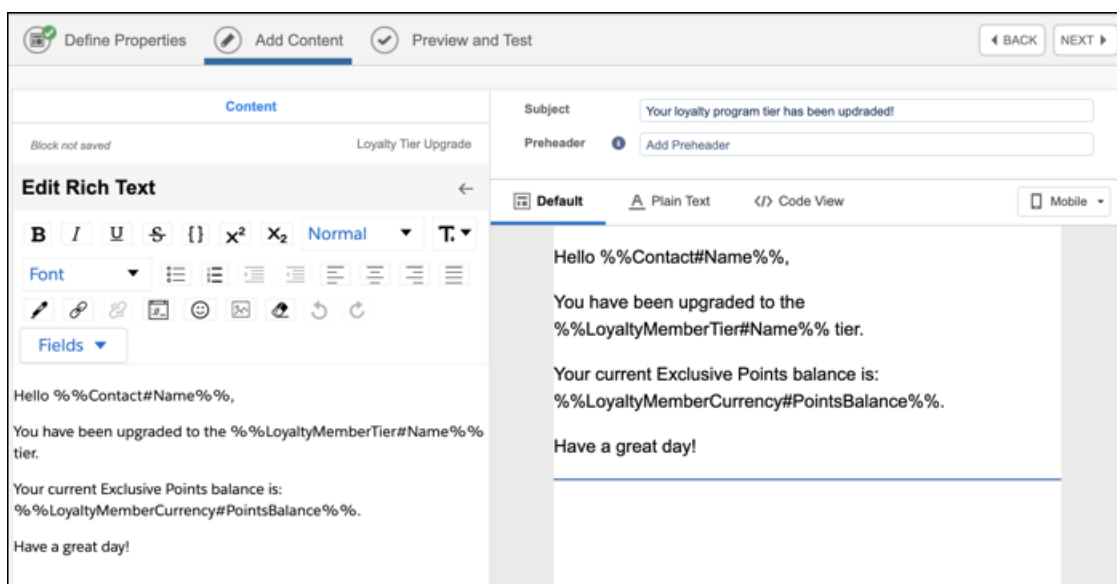
[Salesforce Help: Use Loyalty Management Content Blocks in Email Templates and Template-Based Emails \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Install the Loyalty Management Content Blocks Package \(can be outdated or unavailable during release preview\)](#)

Get an Early Start on Your Tier Upgrade Emails

Email members immediately after upgrading them to a new tier. Use the Loyalty Tier Upgrade content block to personalize emails. To access the Loyalty Management content blocks in Marketing Cloud, install the Loyalty Management Content Blocks package. The content block helps you pull data from your Loyalty Management records to use in your emails or email templates.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have Loyalty Management and Marketing Cloud enabled.



SEE ALSO:

[Salesforce Help: Use Loyalty Management Content Blocks in Email Templates and Template-Based Emails \(can be outdated or unavailable during release preview\)](#)

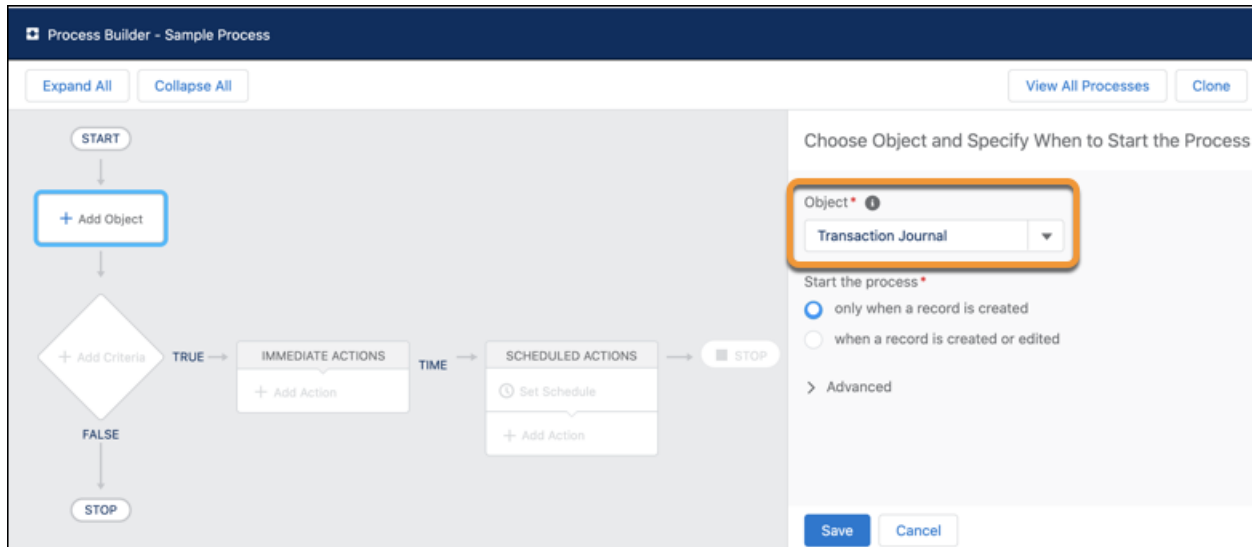
[Salesforce Help: Install the Loyalty Management Content Blocks Package \(can be outdated or unavailable during release preview\)](#)

Trigger Automated Process Using Transaction Journals

Trigger business processes in Flows and Process Builder when Transaction Journal records are created or updated. Whenever transaction journals are created or updated, you can trigger processes such as crediting points, updating other records, or sending the member an email.

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

How: In Process Builder, use the Transaction Journal object as the basis for starting a process. In a Record-Triggered flow, select the Transaction Journal object to trigger the flow.



Simplify the Tier Model Setup

Added validations align tier group settings with both fixed tier and anniversary tier models. They allow you to specify the tier period as months or years, thus simplifying the tier assessment process. For anniversary model tiers, you can align a member's tier expiration date with their enrollment anniversary. For fixed model tiers, you can align the tier expiration date with the member's qualifying points reset date. The points for fixed model tiers are then reset in years.

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

When: This change applies from the Summer '21 release onwards.

How: When you create a Loyalty Tier Group record, the tier model that you select determines the available options. If tier groups in your LoyaltyManagement app use values that are no longer valid, change the setting to ensure that the processes associated with the tiers work.

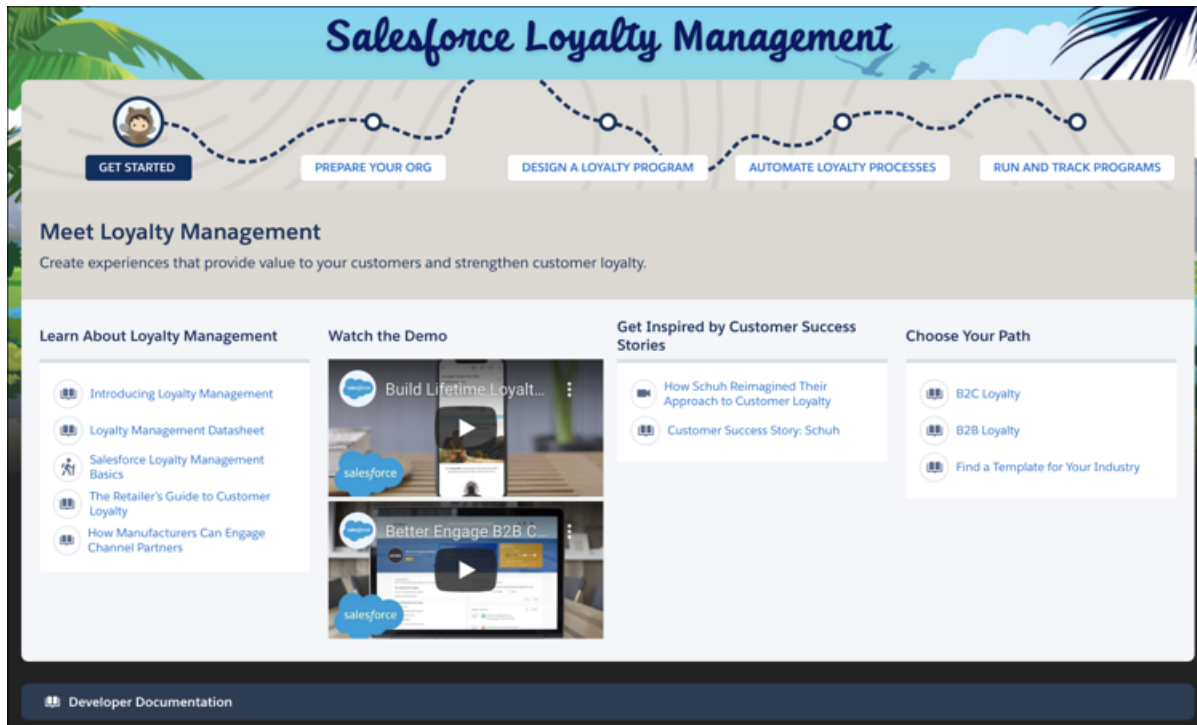
SEE ALSO:

[Salesforce Help: Create a Loyalty Tier Group \(can be outdated or unavailable during release preview\)](#)

Start Your Journey with the Loyalty Management Learning Map

Take the path to success with the Salesforce Loyalty Management learning map. The learning map guides you through every step of your journey from creating a loyalty program with targeted resources to running the program. Find articles, help topics, and Trailhead modules in one place, and get your loyalty program up and running in no time!

How: Click a stop on the map to see content relevant to that stop.



SEE ALSO:

[Learning Map: Salesforce Loyalty Management \(can be outdated or unavailable during release preview\)](#)

Analytics for Loyalty

Get insights into your program's revenue and view the liability forecast. Use the Predictions for Promotion Revenue app to get predictions on promotion revenue.

IN THIS SECTION:

[Increase Promotion Revenue with Einstein Discovery Predictions \(Beta\)](#)

Get predictions on revenue generated from promotions, identify target segments that generate higher revenue, and devise strategies to improve promotion revenue. View the predicted revenue by states, loyalty tiers, and member interests.

[Anticipate Liabilities with Time Series Forecasting](#)

Use the new Liability Forecast dashboard to analyze your loyalty program's revenue and liability, and manage your liabilities based on the forecasts.


[Other Improvements to Analytics for Loyalty](#)

The improvements help you to effectively manage loyalty programs and grow business.

Increase Promotion Revenue with Einstein Discovery Predictions (Beta)

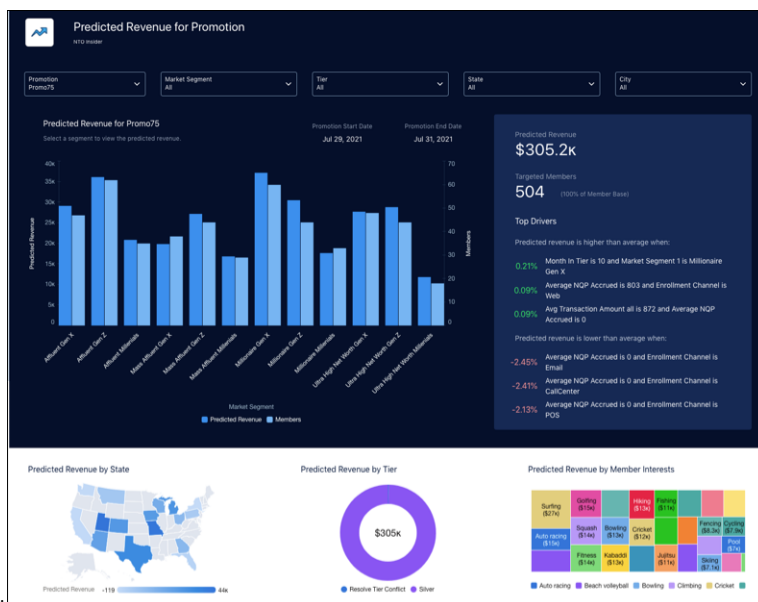
Get predictions on revenue generated from promotions, identify target segments that generate higher revenue, and devise strategies to improve promotion revenue. View the predicted revenue by states, loyalty tiers, and member interests.

Where: This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is enabled.

 **Note:** This feature is a Beta Service. Customers 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 an app from the Predictions for Promotion Revenue (beta) template, you need the Loyalty Analytics Plus add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App**. Select **Predictions for Promotion Revenue**, and then



follow the instructions in the wizard to create your app.

Anticipate Liabilities with Time Series Forecasting

Use the new Liability Forecast dashboard to analyze your loyalty program's revenue and liability, and manage your liabilities based on the forecasts.

Where: This change applies to Tableau CRM in Lightning Experience Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is enabled.

Who: To use liability forecasting, you need either the Loyalty Analytics Plus add-on license or the CLAAalytics Base App license. Users who are assigned a CLAAalytics Base App license can use liability forecasting only for one period.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App > Analytics for Loyalty**. Follow the instructions in the



wizard to create your app.

Other Improvements to Analytics for Loyalty

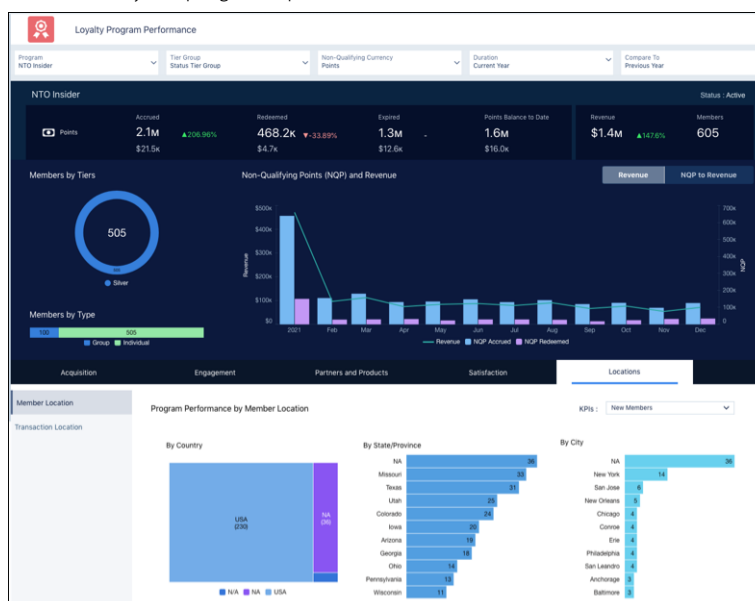
The improvements help you to effectively manage loyalty programs and grow business.

Where: This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is enabled.

Who: These improvements are available to users with the Loyalty Analytics Plus add-on license.

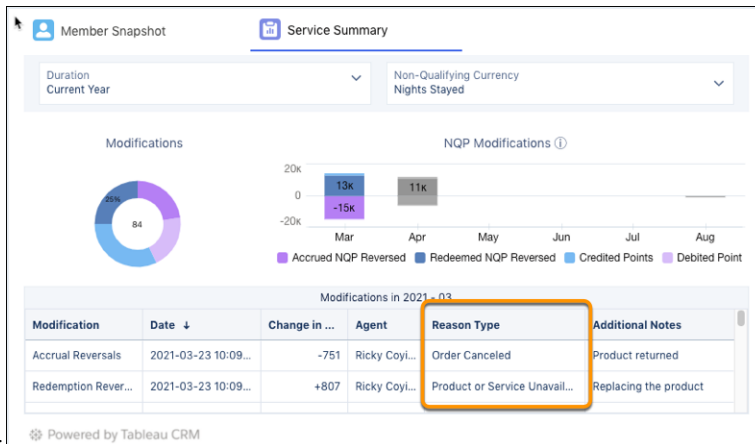
Why:

- Use the enhanced Program Performance dashboard to know the financial impact of accrued non-qualifying points (NQP), redeemed NQP, expired NQP, and points balance. You can also analyze a program's performance based on the transaction location and member



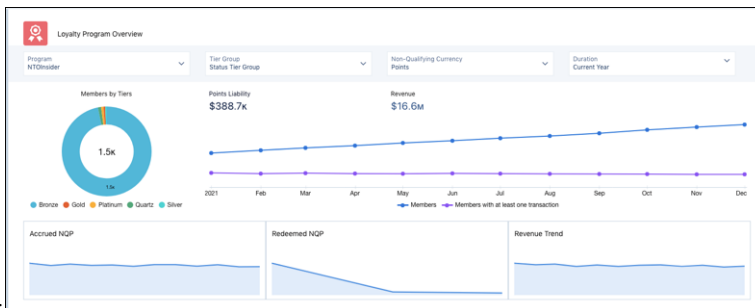
location, and design relevant promotions.

- Identify the reasons for manual point adjustments and provide better service to



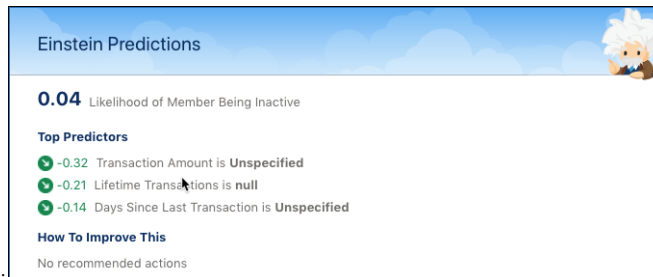
members.

- Embed the lighter version of the Program Overview dashboard on your home page to get instant insight into your loyalty



program.

- Embed the Likelihood of Member Being Inactive model card on a loyalty member page and get real-time predictions on a member



turning inactive.

- Remember that the default values for the Tier Group and NQP Currency global filters are now set based on the program's primary tier group and primary currency.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Add a member to a group

Use the new `LoyaltyPgmGroupMbrRInsp` object.

Create vouchers

Use the newly supported `Create` call of the `Voucher` object.

Create a member group

Use the new `Group` value in the `MemberType` field of the `LoyaltyProgramMember` object.

Indicate whether vouchers are redeemable across multiple transactions

Use the new `IsPartialRedeemable` field of the `VoucherDefinition` object.

See the amount a member has redeemed from a partially redeemable voucher

Use the new `RedeemedValue` field of the `Voucher` object.

See the amount remaining on a voucher after the member has partially redeemed it

Use the new `RemainingValue` field of the `Voucher` object.

Specify the number of days after which escrow points are credited to a members' point balance

Use the new `EscrowPeriod` field of the `LoyaltyProgram` object.

Indicate whether to place points of a currency in escrow

Use the new `HasEscrow` field of the `LoyaltyProgramCurrency` object.

See the number of points that are still in escrow

Use the new `TotalEscrowPointsAccrued` field of the `LoyaltyMemberCurrency` object.

See the number of points that were credited to the member from escrow

Use the new `TotalEscrowRolloverPoints` field of the `LoyaltyMemberCurrency` object.

See the date to credit escrow points to a member for an associated journal

Use the new `EscrowPointsCreditDate` field of the `TransactionJournal` object.

See the date to credit escrow points to a member for an associated ledger

Use the new `EscrowPointsCreditDate` field of the `LoyaltyLedger` object.

New and Changed Invocable Actions in Loyalty Management

Use the new and changed invocable actions for Loyalty Management.

Transfer points to member's associated groups

Use the new `transferMemberPointsToGroups` action.

Get promotions that are eligible for a transaction journal

Use the new `getLoyaltyPromotion` action.

Get promotions that are eligible for a program member

Use the new `getLoyaltyPromotionBasedOnSalesforceCDP` action.

Update the progress a member has made towards attaining a cumulative promotion

Use the new `updateProgressForCumulativePromotionUsage` action.

Specify the face value and discount percentage for a voucher

Use the new `FaceValue` and `DiscountPercent` fields on the existing `issueVoucher` action.

Get the escrow points balance of a program member

Use the new `EscrowPointsBalance` output field on the existing `getPointsBalance` action.

New Action Type Value in Loyalty Management

Loyalty Management has a new `actionType` enumeration value.

Transfer points from an individual member or a corporate member to the member's associated group

Use the new `transferMemberPointsToGroups` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

Get promotions that are eligible for a transaction journal

Use the new `getLoyaltyPromotion` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

Get promotions that are eligible for a program member

Use the new `getLoyaltyPromotionBasedOnSalesforceCDP` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

Update the progress a member has made towards attaining a cumulative promotion

Use the new `updateProgressForCumulativePromotionUsage` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

Automatically update non-qualifying points balance for members when points are credited

Use the new `IndustriesLoyaltySettings` metadata type.

Connect REST API

Loyalty Management REST API includes changed call.

Loyalty Management

Redeem a voucher for a program member using a request body

Make a GET request to the

`/services/data/vXX.X/loyalty/programs/{programName}/members/{membershipNumber}/vouchers/{voucherCode}/redeem` resource.

New request body: Redeem Voucher Input

New response body: Redeem Voucher Output

SEE ALSO:

[Loyalty Management Developer Guide: Redeem Voucher \(can be outdated or unavailable during release preview\)](#)

Apex: New Items in Loyalty Management

These classes are new.

ConnectApi Namespace

The `ConnectApi` namespace has this new method and these new classes.

Methods

This new method is in the `ConnectApi.LoyaltyVoucherConnect` class.

Redeem a voucher for a member by using a request body

`redeem(programName, membershipNumber, voucherCode, amount)`

New input class— `ConnectApi.RedeemVoucherInput`

New output class— `ConnectApi.RedeemVoucherOutput`

loyalty_management Namespace

The `loyalty_management` namespace has these new methods and classes.

Call Loyalty Management actions from Apex code

Use the new `loyalty_management.LoyaltyResources` class. This class has these new methods.

- `changeTier(changeTierList)` —This method changes the tier for a loyalty program member.
- `creditPoints(creditPointsList)` —This method credits loyalty points to a loyalty program member's balance.
- `deditPoints(deditPointsList)` —This method debits loyalty points from a loyalty program member's balance.
- `getLoyaltyPromotionBasedOnCustomer360Audiences(loyaltyPromotionInputList)` —This method retrieves a member's eligible promotions based on the member's market segment.
- `getLoyaltyPromotions(loyaltyPromotionInputList)` —This method retrieves active promotions that are eligible for a transaction journal.
- `getPointsBalance(getPointsBalanceList)` —This method gets loyalty points balance for a loyalty program member.
- `getTier(getTierList)` —This method gets the current tier information for a loyalty program member.
- `issueVoucher(issueVoucherList)` —This method issues a voucher for a loyalty program member.
- `transferMember(transferMemberList)` —This method transfers points from an individual member or a corporate member to the member's associated group.

Change tier for a loyalty program member

Use the new `loyalty_management.ChangeTierInput` class. This class receives the input parameter values for the Change Tier action.

Credit points to or debit points from a loyalty program member's balance

Use the new `loyalty_management.PointsInput` class. This class receives the input parameter values for the Credit and Debit point actions.

Get active promotions that are eligible for a transaction journal

Use the new `loyalty_management.LoyaltyPromotionInput` class. This class receives the input parameter values for the Loyalty Promotion action.

Get current tier for a loyalty program member

Use the new `loyalty_management.MemberTierInput` class. This class receives the input parameter values for the Get Member Tier action.

Get points balance for a loyalty program member

Use the new `loyalty_management.MemberPointBalanceInput` class. This class receives the input parameter values for the Get Member Points action.

Get a member's eligible promotions based on the member's market segment

Use the new `loyalty_management.CdpBasedLoyaltyPromotionInput` class. This class receives the input parameter values for the Customer Data Platform-based Loyalty Promotion action.

Issue a voucher to a loyalty program member

Use the new `loyalty_management.IssueVoucherInput` class. This class receives the input parameter values for the Issue Voucher action.

Transfer points from an individual member or a corporate member to the member's associated group

Use the new `loyalty_management.TransferMemberPointsToGroupInput` class. This class receives the input parameter values for the Transfer Member Points To Groups action.

Set inputs to change the tier for a loyalty program member

Use the new `loyalty_management.ChangeTierInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.ChangeTierInput` object.
- `setChangeReason(changeReason)` —This method sets the reason to change a member tier.

- `setLoyaltyProgramMemberId(loyaltyProgramMemberId)` —This method sets the ID of the loyalty program member.
- `setProgramName(programName)` —This method sets the loyalty program name associated with the tier.
- `setTargetTierName(targetTierName)` —This method sets the new tier to associate with the loyalty program member.
- `setTierGroupName(tierGroupName)` —This method sets the name of the loyalty tier group.

Set inputs to credit points to or debit points from a loyalty program member's balance

Use the new `loyalty_management.PointsInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.PointsInput` object.
- `setAdditionalNotes(additionalNotes)` —This method sets extra information about the transactions performed by the loyalty program member.
- `setCorrelationId(correlationId)` —This method sets the ID of the Salesforce entity.
- `setFlowId(flowId)` —This method sets the ID of the flow associated with the credit or debit points action.
- `setJournalId(journalId)` —This method sets the ID of the transaction journal.
- `setLoyaltyProgramMemberId(loyaltyProgramMemberId)` —This method sets the ID of the loyalty program member.
- `setPoints(points)` —This method sets the points available with the loyalty program member.
- `setProgramCurrencyName(programCurrencyName)` —This method sets the name of the loyalty program currency.
- `setProgramName(programName)` —This method sets the name of the loyalty program.

Set inputs to get the current tier for a given loyalty program member

Use the new `loyalty_management.MemberTierInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.MemberTierInput` object.
- `setLoyaltyProgramMemberId(loyaltyProgramMemberId)` —This method sets the ID of the loyalty program member whose tier details are to be fetched.
- `setProgramName(programName)` —This method sets the name of the loyalty program.
- `setTierGroupName(tierGroupName)` —This method sets the name of the tier group.

Set inputs to get points balance for a given loyalty program member

Use the new `loyalty_management.MemberPointBalanceInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.MemberPointBalanceInput` object.
- `setLoyaltyProgramMemberId(loyaltyProgramMemberId)` —This method sets the ID of the loyalty program member whose points balance is to be fetched.
- `setProgramCurrencyName(programCurrencyName)` —This method sets the name of the program currency.
- `setProgramName(programName)` —This method sets the name of the loyalty program.

Set inputs to get a member's eligible promotions based on the member's market segment

Use the new `loyalty_management.CdpBasedLoyaltyPromotionInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.CdpBasedLoyaltyPromotionInput` object.
- `setMemberId(memberId)` —This method sets the ID of a loyalty program member.
- `setPromotionIds(promotionIds)` —This method sets the list of promotion IDs to filter the promotions that are eligible for a member.

Set inputs to get eligible promotions for a transaction journal

Use the new `loyalty_management.LoyaltyPromotionInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.LoyaltyPromotionInput` object.
- `setJournalIds(journalIds)` —This method sets the transaction journal that retrieval of active loyalty promotions is based on.

Set inputs to issue a voucher for a loyalty program member

Use the new `loyalty_management.IssueVoucherInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.IssueVoucherInput` object.
- `setAdditionalNotes(additionalNotes)` —This method sets the extra information about the voucher.
- `setBenefitId(benefitId)` —This method sets the benefits associated with the voucher.
- `setContactId(contactId)` —This method sets the contact associated with the loyalty program member.
- `setDiscountPercent(discountPercent)` —This method sets the discount percentage provided by the voucher.
- `setEffectiveDate(effectiveDate)` —This method sets the start date of the validity of the voucher.
- `setExpiryDate(expiryDate)` —This method sets the expiry date of the voucher.
- `setFaceValue(faceValue)` —This method sets the discount amount provided by the voucher.
- `setJournalId(journalId)` —This method sets the transaction journal associated with the member voucher.
- `setLoyaltyProgramMemberId(loyaltyProgramMemberId)` —This method sets the ID of the loyalty program member.
- `setProgramName(programName)` —This method sets the name of the loyalty program.
- `setPromotionId(promotionId)` —This method sets the promotions associated with the voucher.
- `setVoucherCode(voucherCode)` —This method sets the voucher identifier.
- `setVoucherDefinitionName(voucherDefinitionName)` —This method sets the voucher definition associated with the voucher code.

Set inputs to transfer points from an individual member or a corporate member to the member's associated group

Use the new `loyalty_management.LoyaltyPromotionInputBuilder` class. This class has these new methods.

- `build()` —This method returns an instance of the `loyalty_management.TranserMemberPointsToGroupsInput` object.
- `setJournalId(journalId)` —This method sets the transaction journal that is used to transfer points to groups.

Provide active promotions for a transaction journal

Use the new `loyalty_management.LoyaltyPromotionOutput` class. This class has this new method.

- `getPromotionIds()` —This method returns the records of active loyalty promotions.

Provide changed tier details for a loyalty program member

Use the new `loyalty_management.ChangeTierOutput` class. This class has these new methods.

- `getLoyaltyProgramMemberId()` —This method returns the loyalty program member ID.
- `getMembertier()` —This method returns the tier associated with the member.
- `getProgramName()` —This method returns the program name.
- `getTierGroupName()` —This method returns the tier group name.

Provide details of points credited to a loyalty program member's balance

Use the new `loyalty_management.CreditPointsOutput` class. This class has these new methods.

- `getCurrencyName()` —This method returns the name of the loyalty program currency.

- `getJournalId()` —This method returns the ID of the transaction journal.
- `getLoyaltyProgramMemberId()` —This method returns the ID of the loyalty program member.
- `getProgramName()` —This method returns the name of the loyalty program.

Provide details of points debited from a loyalty program member's balance

Use the new `loyalty_management.DebitPointsOutput` class. This class has these new methods.

- `getCurrencyName()` —This method returns the name of the loyalty program currency.
- `getJournalId()` —This method returns the ID of the transaction journal.
- `getLoyaltyProgramMemberId()` —This method returns the total points available for the loyalty program member.
- `getPoints()` —This method returns the ID of the loyalty program member.
- `getProgramName()` —This method returns the name of the loyalty program.

Provide error information from Loyalty Management actions called from Apex code

Use the new `loyalty_management.LoyaltyActionError` class. This class has these new methods.

- `getCode()` —This method returns a string containing an error code returned by a Loyalty Management action.
- `getMessage()` —This method returns a string containing the error message returned by a Loyalty Management action.

Provide a member's eligible promotions based on the member's market segment

Use the new `loyalty_management.CdpBasedLoyaltyPromotionOutput` class. This class has this new method.

- `getPromotionIds()` —This method returns the promotions that are eligible for a member.

Provide points balance for a given loyalty program member

Use the new `loyalty_management.MemberPointBalanceOutput` class. This class has these new methods.

- `getCurrencyName()` —This method returns the name of the program currency.
- `getEscrowPointsBalance()` —This method returns the points balance with escrow for a loyalty program member.
- `getLoyaltyProgramMemberId()` —This method returns the ID of the loyalty program member.
- `getPoints()` —This method returns the points available for the loyalty program member.
- `getProgramName()` —This method returns the name of the program.

Provide tier details for a specified loyalty program member

Use the new `loyalty_management.MemberTierOutput` class. This class has these new methods.

- `getLoyaltyProgramMemberId()` —This method returns the ID of the loyalty program member.
- `getMemberTier()` —This method returns the name of the tier associated with the program member.
- `getProgramName()` —This method returns the name of the program.
- `getSequenceNumber()` —This method returns the ranking of the tier.
- `getTierGroupName()` —This method returns the name of the tier group.

Provide results from Loyalty Management actions called from Apex code

Use the new `loyalty_management.LoyaltyActionResult` class. This class has these new methods.

- `getErrors()` —This method returns a list of `loyalty_management.LoyaltyActionError` objects.
- `isSuccess()` —This method returns true when the Loyalty Management action runs successfully.

Provide voucher details issued for a loyalty program member

Use the new `loyalty_management.IssueVoucherOutput` class. This class has this new method.

- `getVoucherId()` —This method returns the voucher ID issued for a loyalty program member.

SEE ALSO:

[Loyalty Management Developer Guide: LoyaltyVoucherConnect Methods \(can be outdated or unavailable during release preview\)](#)

Industries: Common Components

Some Industries products are available for use in more than one Industries solution, or in Clouds outside of Industries. In this release, we've enhanced filtering and performance for the Data Processing Engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex class for loyalty management, and much more.

IN THIS SECTION:

[Data Processing Engine](#)

Filter records based on words or phrases of your choice. Find out the length of field values. Run Data Processing Engine definitions more frequently. Create definitions for more complex business scenarios, and start multiple runs of a definition simultaneously.

[Batch Management](#)

Create Batch Management jobs with Manufacturing Cloud. Create Batch Management jobs using a Metadata API instead of objects.

[Einstein Relationship Insights](#)

Get deeper relationship insights by configuring additional person and company record objects. Learn how Einstein Relationship Insights now saves your object configurations. Use various content sources to explore relationships. Refine your search results with keywords when exploring relationships in the Smart Tag view. Learn about the small changes in the UI that provide a better user experience.

[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 your Salesforce org and external sources.

[Action Plans](#)

Enable your users to print action plan items to collaborate better, create reports for action plan items to get better insights, and get task reminders.

[Use Intelligent Form Reader in Regions Compliant for Data Residency](#)

Intelligent Form Reader is now compliant for Data Residency in Australia and Canada. Document extraction requests from these regions are redirected to the respective AWS region.

[Digital Process Automation](#)

Build customer-focused digital experiences fast with the Digital Process Automation (DPA) toolset for workflow automation and orchestration.

[Monitor Documents as They're Transformed](#)

Users can now view a document and the new record window simultaneously when they create records from transformed documents.

Data Processing Engine

Filter records based on words or phrases of your choice. Find out the length of field values. Run Data Processing Engine definitions more frequently. Create definitions for more complex business scenarios, and start multiple runs of a definition simultaneously.

IN THIS SECTION:

[Filter Records Based on a Set of Values](#)

Filter records based on whether a set of phrases, words, or characters is present in a specific field's value. Define criteria to filter records based on whether the values you specify are present in a field's value.

[Find the Length of a Word or Number](#)

Use the new Length function in a formula to get a field value's character count. You can store the character count in a Number type field.

[Increase Your Data Processing Engine Limits](#)

Run Data Processing Engine definitions without worrying about the daily or monthly Salesforce Data Pipeline limits. You can increase your Salesforce Data Pipeline limits with add-on licenses.

[Get More Out of Your Definitions with Increased Limits](#)

Use Data Processing Engine for more business scenarios. A Salesforce org can contain up to 50 active definitions. Create more complex definitions with up to 500 nodes and 500 fields in each node. A definition can now have 50 Data Source nodes and 10 Writeback Object nodes.

[Get Your Definitions Up and Running Faster](#)

With some minor tweaks, you get a better user experience. The aliases of selected fields in Data Source and Join nodes are now autopopulated. When selecting fields or looking at selected fields, use type-ahead search to find fields quicker.

[Run Definitions with Different Input Variable Values Simultaneously](#)

If you use definitions for multiple business scenarios, you don't have to run the definition for each business scenario one at a time. As long as each definition has unique input variable values, you can run them simultaneously. You can start multiple definitions runs using the Data Processing Engine action twice in a flow or on the Data Processing Engine builder. You can also start a run by invoking `dataProcessingEngineAction`.

[Create Definitions with Manufacturing Cloud](#)

Data Processing Engine is now available with Manufacturing Cloud. Use the definitions provided with Manufacturing Cloud for advanced account forecasting, or create your own.

[Changed Objects in Data Processing Engine](#)

Do more with the updated Data Processing Engine fields.

[Data Processing Engine Has a Changed Metadata Type](#)

`BatchCalcJobDefinition` metadata type includes new picklist values.

Filter Records Based on a Set of Values

Filter records based on whether a set of phrases, words, or characters is present in a specific field's value. Define criteria to filter records based on whether the values you specify are present in a field's value.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled. Data Pipelines must be enabled in the Salesforce org.

How: In a Data Processing Engine definition, click **New Node**. Select the node type as **Filter**. Select the data source node that contains the field whose value determines which records are filtered. Select the **In** operator if you want to keep records that contain the values you specify. Select the **Not In** operator if you want to keep records that don't contain the values you specify. Select **Field** as the Type. In the Value field, enter the phrases, words, or characters that you want to use as filter criteria.

Filter : Filter by City Delete

*Source Node
Account

☐ Use a filter input variable

Filters
Select Records When
All conditions are met (AND)

*Field	*Operator	*Type
ShippingCity	In	Field

*Value
Enter a value and press |
Kolkata × Liverpool ×
Brisbane × New York ×

+ Add Condition

This node is referenced by 0 nodes. Cancel Done

SEE ALSO:

[Salesforce Help: Filters \(can be outdated or unavailable during release preview\)](#)

Find the Length of a Word or Number

Use the new Length function in a formula to get a field value's character count. You can store the character count in a Number type field.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled. Data Pipelines must be enabled in the Salesforce org.

How: In a Data Processing Engine definition, click **New Node**. Select the node type as **Formula**. Select the source node that contains the field you want to find the length for. In the Formulas section, provide an alias for the field that stores the character count, and select **Number** for the data type. Select the Length function, place the cursor within the parenthesis, and select the field where you want to determine the character count. Here's the formula to get the length of the value stored in a field named Annual Revenue:
LENGTH({AnnualRevenue}).

The screenshot shows the Salesforce Formula Builder interface for a formula named "Account Annual Income Length". At the top, there are "View Results" and "Delete" buttons. Below the title, the "Source Node" is set to "Account". A toggle for "Use the compute relative transformation" is set to "Off".

The "Formulas" section contains the following configuration:

- Alias:** AnnualIncomeLength
- Field Type:** Number
- Length:** 15
- Decimal Places:** 2

Below these settings is a search bar with the text "Search fields...". Underneath the search bar, the formula `LENGTH({AnnualRevenue})` is entered and highlighted with an orange border. To the right of the search bar are buttons for "Select a catr...", "Select function...", and "Select operator...".

Below the formula input, there is a "Validate Syntax" button and a green checkmark indicating "The formula is valid". At the bottom left, there is an "Add Formula" button. At the bottom right, there are "Cancel" and "Done" buttons. A status bar at the very bottom indicates "This node is referenced by 0 nodes."

SEE ALSO:

[Salesforce Help: Formulas \(can be outdated or unavailable during release preview\)](#)

Increase Your Data Processing Engine Limits

Run Data Processing Engine definitions without worrying about the daily or monthly Salesforce Data Pipeline limits. You can increase your Salesforce Data Pipeline limits with add-on licenses.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled. Data Pipelines must be enabled in the Salesforce org.

How: Contact your Salesforce representative to learn more about the Salesforce Data Pipelines add-on license.

SEE ALSO:

[Salesforce Help: Data Processing Engine Limits \(can be outdated or unavailable during release preview\)](#)

Get More Out of Your Definitions with Increased Limits

Use Data Processing Engine for more business scenarios. A Salesforce org can contain up to 50 active definitions. Create more complex definitions with up to 500 nodes and 500 fields in each node. A definition can now have 50 Data Source nodes and 10 Writeback Object nodes.

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SEE ALSO:

[Salesforce Help: Data Processing Engine Limits \(can be outdated or unavailable during release preview\)](#)

Get Your Definitions Up and Running Faster

With some minor tweaks, you get a better user experience. The aliases of selected fields in Data Source and Join nodes are now autopopulated. When selecting fields or looking at selected fields, use type-ahead search to find fields quicker.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled. Data Pipelines must be enabled in the Salesforce org.

Run Definitions with Different Input Variable Values Simultaneously

If you use definitions for multiple business scenarios, you don't have to run the definition for each business scenario one at a time. As long as each definition has unique input variable values, you can run them simultaneously. You can start multiple definitions runs using the Data Processing Engine action twice in a flow or on the Data Processing Engine builder. You can also start a run by invoking `dataProcessingEngineAction`.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled. Data Pipelines must be enabled in the Salesforce org.

SEE ALSO:

[Salesforce Help: Run Data Processing Engine Definitions \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: What Happens If a Definition Has Two or More Runs in Progress Simultaneously? \(can be outdated or unavailable during release preview\)](#)

Create Definitions with Manufacturing Cloud

Data Processing Engine is now available with Manufacturing Cloud. Use the definitions provided with Manufacturing Cloud for advanced account forecasting, or create your own.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Manufacturing Cloud is enabled.

Changed Objects in Data Processing Engine

Do more with the updated Data Processing Engine fields.

Use updated picklist values

Use the updated `Canceled` picklist value instead of `Canceled` in the Status field of `BatchJob`, `BatchJobPart`, and `BatchJobStatusChangedEvent` objects.

Data Processing Engine Has a Changed Metadata Type

`BatchCalcJobDefinition` metadata type includes new picklist values.

Filter records based on values that you define

Use the `operator` field's new `In` and `NotIn` values in the `BatchCalcJobFilterCriteria` field collection of the `BatchCalcJobDefinition` metadata type.

Batch Management

Create Batch Management jobs with Manufacturing Cloud. Create Batch Management jobs using a Metadata API instead of objects.

IN THIS SECTION:[Create Batch Management Jobs with Manufacturing Cloud](#)

Batch Management is now available with Manufacturing Cloud. Use Batch Management jobs to process records for business flows related to the manufacturing industry.

[Use Metadata API instead of Objects to Create Batch Management Jobs](#)

Use Batch Management's Metadata API to create Batch Management jobs. You can no longer use Batch Management objects to create Batch Management jobs.

[Changed Objects in Batch Management](#)

Do more with the new Batch Management fields.

Create Batch Management Jobs with Manufacturing Cloud

Batch Management is now available with Manufacturing Cloud. Use Batch Management jobs to process records for business flows related to the manufacturing industry.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

Use Metadata API instead of Objects to Create Batch Management Jobs

Use Batch Management's Metadata API to create Batch Management jobs. You can no longer use Batch Management objects to create Batch Management jobs.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

SEE ALSO:

[Industries Common Resources Developer Guide: Batch Management Metadata API \(can be outdated or unavailable during release preview\)](#)

Changed Objects in Batch Management

Do more with the new Batch Management fields.

Use updated picklist values

Use the updated `Canceled` picklist value instead of `Canceled` in the `Status` field of `BatchJob`, `BatchJobPart`, and `BatchJobStatusChangedEvent` objects.

Einstein Relationship Insights

Get deeper relationship insights by configuring additional person and company record objects. Learn how Einstein Relationship Insights now saves your object configurations. Use various content sources to explore relationships. Refine your search results with keywords when exploring relationships in the Smart Tag view. Learn about the small changes in the UI that provide a better user experience.

IN THIS SECTION:

[Explore More Object Relationships with Additional Person and Company Record Objects](#)

Explore object relationships with as much data as possible. Now your sales teams can configure up to five company and person record objects. For example, when you configure Leads, Contacts, and two custom objects as your person records, your sales team can search for relationships with all these record objects.

[Use Simple Model to Easily Explore Relationships](#)

If you're new to Einstein Relationship Insights, explore relationships easily by using the default Simple Model. Simple Model uses person and company record objects to explore relationships. But if you're a growth license user who wants to explore complex relationships, you can switch to Active Record Model.

[Store Object Configurations in a Dedicated Database](#)

Object configurations for Einstein Relationship Insights are now stored in a dedicated database. These configurations were previously stored in your org, which made storing large number of configurations difficult. With the new database, you can manage a large number of object mappings and configurations. For the mandatory database migration to take effect, turn off and then turn on Einstein Relationship Insights, and then save your object mappings and configurations to the new database. This task isn't optional.

[Get Relationship Recommendations from Multiple Sources](#)

Expand the scope of your relationship recommendations by including various content sources. You can select Slack, Twitter, news, and information on the internet as the content sources. For example, when you select Slack as a content source, Einstein Relationship Insights explores Slack attachments to discover relationships between people and companies. Your sales teams can then identify prospective customers and business opportunities, and build a network of people and companies using the Slack content.

[Find Items in Smart Tag View Easily by Searching with Keywords](#)

Now you can easily find a person or company that you're looking for when exploring relationships in the Smart Tag view by using keyword searches. All references to the keyword in the search results appear in bold. You can find references to the keyword without reading every search result. To find a person or company, on the Smart Tag view for Relationships, in the Search field, enter the keyword.

[Smarttagscanvasapp Is Renamed Einstein Relationship Insights Canvas App](#)

The Einstein Relationship Insights app in the App Manager is now named Einstein Relationship Insights Canvas App. All the awesome features that enable you to explore people and company connections and uncover key relationship networks remain unchanged. Turn off and then turn on Einstein Relationship Insights to ensure seamless integration of the UI changes.

[Experience Improved Usability with Updated Labels](#)

Learn about updated labels that improve your experience with Einstein Relationship Insights.

Explore More Object Relationships with Additional Person and Company Record Objects

Explore object relationships with as much data as possible. Now your sales teams can configure up to five company and person record objects. For example, when you configure Leads, Contacts, and two custom objects as your person records, your sales team can search for relationships with all these record objects.

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**. To configure person record objects, click **Add Person Record Object**. To configure company record object, click **Add Company Record Object**.

Object Connections
Select the objects and records that track connections between people and companies.

* Active Record Object
Opportunity

* Person Record Object 1
Record Type
Contact
Select an Option

* Display Field 1
Account Name

* Display Field 2
Assistant

* Display Field 3
Email

Add Person Record Object

* Company Record Object 1
Record Type
Account
Select an Option

* Display Field 1
Account Name

* Display Field 2
Website

* Display Field 3
Annual Revenue

Add Company Record Object

SEE ALSO:

[Salesforce Help: Enable and Configure Einstein Relationship Insights \(can be outdated or unavailable during release preview\)](#)

Use Simple Model to Easily Explore Relationships

If you're new to Einstein Relationship Insights, explore relationships easily by using the default Simple Model. Simple Model uses person and company record objects to explore relationships. But if you're a growth license user who wants to explore complex relationships, you can switch to Active Record Model.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

How: To switch to Active Record Model from the default Simple Model, from the Einstein Relationship Insights settings page, under Object Model, select **Active Record Model**.

Store Object Configurations in a Dedicated Database

Object configurations for Einstein Relationship Insights are now stored in a dedicated database. These configurations were previously stored in your org, which made storing large number of configurations difficult. With the new database, you can manage a large number of object mappings and configurations. For the mandatory database migration to take effect, turn off and then turn on Einstein Relationship Insights, and then save your object mappings and configurations to the new database. This task isn't optional.

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**. Turn off and then turn on Einstein Relationship Insights, verify your object mappings, and then save your changes.

Get Relationship Recommendations from Multiple Sources

Expand the scope of your relationship recommendations by including various content sources. You can select Slack, Twitter, news, and information on the internet as the content sources. For example, when you select Slack as a content source, Einstein Relationship Insights explores Slack attachments to discover relationships between people and companies. Your sales teams can then identify prospective customers and business opportunities, and build a network of people and companies using the Slack content.

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**. In the Content Sources section, select the applicable content sources.

SEE ALSO:

[Salesforce Help: Connect Slack as a Content Source \(can be outdated or unavailable during release preview\)](#)

Find Items in Smart Tag View Easily by Searching with Keywords

Now you can easily find a person or company that you're looking for when exploring relationships in the Smart Tag view by using keyword searches. All references to the keyword in the search results appear in bold. You can find references to the keyword without reading every search result. To find a person or company, on the Smart Tag view for Relationships, in the Search field, enter the keyword.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

Why: For example, to find references to the Acme account in the relationship evidence for John Smith, enter *Acme* as the keyword in the Search field. All references to Acme in the search results show in bold.

Insights Activity Chatter

🔍 John Smith 👁 acme

Relationships (6)

Message in #sales-leads from Jane Doe 6/10/19
<https://app.slack.com/client/DF3458793/>

John Smith can put us in touch with his COO Harold Palmer - he is the probably the best person to discuss partnerships. Can also put us in touch with Acme's CTO Joy Wong. Set up a meeting with our

John Smith 👁 Acme Co 👁 Harold Palmer +

Acme Co announces partnership with 4/18/20
<https://techcrunch.com/2020/04/18/acme->

Acme Co. announced today that it was partnering with GuuDo, Inc. to bring their artificial intelligence solutions to a broader market. Acme CEO John Smith said of the partnership, "we are looking

John Smith 👁 Acme Co 👁 GuuDo Inc. +

SEE ALSO:

[Salesforce Help: Refine Evidence for Relationships with Keywords \(can be outdated or unavailable during release preview\)](#)

Smarttagscanvasapp Is Renamed Einstein Relationship Insights Canvas App

The Einstein Relationship Insights app in the App Manager is now named Einstein Relationship Insights Canvas App. All the awesome features that enable you to explore people and company connections and uncover key relationship networks remain unchanged. Turn off and then turn on Einstein Relationship Insights to ensure seamless integration of the UI changes.

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**. Turn off and then turn on Einstein Relationship Insights, verify your object mappings, and then save your changes.

Experience Improved Usability with Updated Labels

Learn about updated labels that improve your experience with Einstein Relationship Insights.

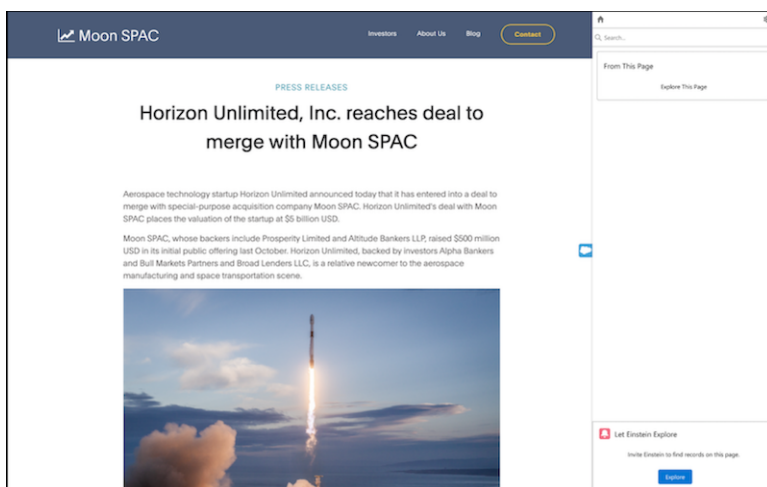
Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

Why: The Salesforce ERI Alpha browser extension on Chrome Web Store is now named Salesforce Einstein Relationship Insights.



The browser menu for the Einstein Relationship Insights extension has different menu options.

- Invite Einstein to this Page section header is now named Let Einstein Explore.
- Invited Einstein to Page button is now named Explore the Page.



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 your Salesforce org and external sources.

IN THIS SECTION:

[Connect REST API](#)

OmniStudio REST API includes new calls.

Connect REST API

OmniStudio REST API includes new calls.

Expression Set (Also Known as Calculation Procedure or Evaluation Service)

Activate a calculation procedure version

Make a PATCH request to the new

`/connect/omnistudio/evaluation-services/version-definitions/{id}` resource.

New response body: Calculation Procedure Activation Output

Retrieve the details for a given calculation procedure

Make a GET request to the new `/connect/omnistudio/evaluation-services/{id}` resource.

New response body: Calculation Procedure Detail Output

Retrieve a list of calculation procedures that contain a specified keyword

Make a GET request to the new `/connect/omnistudio/evaluation-services` resource.

New response body: Calculation Procedure List Output

Retrieve the details of calculation procedure version

Make a GET request to the new `/connect/omnistudio/evaluation-services/version-definitions/{id}` resource.

New response body: Calculation Procedure Version Definition Output

Retrieve the information about the input variables of a calculation procedure version

Make a GET request to the new

`/connect/omnistudio/evaluation-services/version-definitions/{id}/simulation` resource.

New request body: Simulation Evaluation Service Input

New response body: Simulation Input Variables Result List

Run a simulation on a calculation procedure version

Make a PATCH request to the new

`/connect/omnistudio/evaluation-services/version-definitions/{id}/simulation` resource.

New request body: Simulation Evaluation Service Input

New response body: Simulation Eval Service Output

Update a calculation procedure version or save a calculation procedure version as a new version

Make a POST request to the new `/connect/omnistudio/evaluation-services/version-definitions` resource.

New request body: Calculation Procedure Version Definition Input

New response body: Calculation Procedure Version Definition Output

Decision Matrix (Also Known as Calculation Matrix)

Add, delete, or update columns in a decision matrix

Make a POST request to the new `/connect/omnistudio/decision-matrices/{matrixId}/columns` resource.

New request body: Decision Matrix Columns Input

New response body: Decision Matrix Output

Add, delete, or update rows in a decision matrix

Make a POST request to the new

`/connect/omnistudio/decision-matrices/{matrixId}/versions/{versionId}/rows` resource.

New request body: Decision Matrix Rows Input

New response body: Decision Matrix Output

Retrieve the details for a given decision matrix

Make a GET request to the new `/connect/omnistudio/decision-matrices/{matrixId}` resource.

New response body: Decision Matrix Result

Retrieve a list of decision matrices that contain a specified keyword

Make a GET request to the new `/connect/omnistudio/decision-matrices` resource.

New response body: Decision Matrix Basic

Retrieve a list of columns in a decision matrix

Make a GET request to the new `/connect/omnistudio/decision-matrices/{matrixId}/columns` resource.

New response body: Decision Matrix Columns Output

Retrieve a paginated list of rows in a decision matrix

Make a GET or POST request to the new

`/connect/omnistudio/decision-matrices/{matrixId}/versions/{versionId}/rows` resource.

New response body: Decision Matrix Rows Output

SEE ALSO:

[Industries Common Resources Developer Guide: Omnistudio Business APIs](#)(can be outdated or unavailable during release preview)

Action Plans

Enable your users to print action plan items to collaborate better, create reports for action plan items to get better insights, and get task reminders.

IN THIS SECTION:[Collaborate Better on Action Plans Even Offline](#)

Now you can enable your users to print tasks and document checklist items related to action plans using the enhanced printable view.

[Provide Better Insights Into Action Plan Items](#)

Now your users can get unified reports for action plans to track the performance of business processes and monitor compliance. Set up report types that enable your users to create action plan reports that contain tasks or document checklist items.

[Improve Timely Task Completion](#)

Monitoring tasks across action plans is a manual, error-prone process. You can now set reminders for tasks in an action plan template to improve task completion rate. When your users create action plans, reminders are automatically set for the corresponding tasks in the action plans.

[Clean Up the Action Plan Template List](#)

You can now delete draft action plan templates that you no longer require.

Collaborate Better on Action Plans Even Offline

Now you can enable your users to print tasks and document checklist items related to action plans using the enhanced printable view.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Edit the Action Plan page layout, and then add the Tasks and Document Checklist Items related lists.

When users open an action plan and click the **Printable View** button, the view shows the plan’s details, tasks, and document checklist items. The printable view displays dependent tasks only if their prerequisite tasks are completed. You can’t modify the list of fields shown in the printable view.

salesforce

Close Window

Print This Page

Expand All | Collapse All

Onboard Genepact

▼ Information

Name	Onboard Genepact	Start Date	7/16/2021
Action Plan Template	Onboarding	Target Record	GenePoint
Skip Nonwork Days For Tasks	<input checked="" type="checkbox"/>	Status	Completed

Tasks

Idea2App

Status

Not Started

Due Date

Sun Jul 18 00:00:00 GMT 2021

Priority

High

Assigned To

Admin User

Document Checklist Items

Passport

Status

New

Document Type

Id Proof

Instructions

File Pertains To

Required

true

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Provide Better Insights Into Action Plan Items

Now your users can get unified reports for action plans to track the performance of business processes and monitor compliance. Set up report types that enable your users to create action plan reports that contain tasks or document checklist items.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: From Setup, in the Quick Find box, enter *Report Types*, and then select **Report Types**. Create report types with action plans as the primary object, and tasks or document checklist items as the dependent object.

Step 2. Define Report Records Set

This report type will generate reports about Action Plans. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A

Action Plans

Primary Object

B

--Select Object--

--Select Object--

Tasks

Document Checklist Items

it one related "B" record.

related "B" records.

A

B

A

B

The selected object has no further relatable objects. [More Info](#)

Improve Timely Task Completion

Monitoring tasks across action plans is a manual, error-prone process. You can now set reminders for tasks in an action plan template to improve task completion rate. When your users create action plans, reminders are automatically set for the corresponding tasks in the action plans.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: In the New Task dialog box on the Action Plan Template page, set the reminder and specify a time.

When your user creates an action plan, a reminder is set—based on the time specified in the template—for the task's due date. Users can modify the reminder date and time if necessary.

Clean Up the Action Plan Template List

You can now delete draft action plan templates that you no longer require.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Click the **Delete Template** button on the Action Plan Template page.

Use Intelligent Form Reader in Regions Compliant for Data Residency

Intelligent Form Reader is now compliant for Data Residency in Australia and Canada. Document extraction requests from these regions are redirected to the respective AWS region.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Intelligent Form Reader setting is enabled. This feature is available in multiple clouds.

Digital Process Automation

Build customer-focused digital experiences fast with the Digital Process Automation (DPA) toolset for workflow automation and orchestration.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Health Cloud, Financial Services Cloud, or Manufacturing Cloud is enabled.

How: The Digital Process Automation tools include:

- **OmniStudio**, a suite of task-based components for delivering customer experiences across multiple channels and devices;
- **Data Processing Engine** for workflow orchestration and rollup calculations on large data sets;
- **Decision Tables** to support rule-based workflow automation;

- **Intelligent Document Automation** features to help accelerate end-to-end document generation, inputting, tracking, and approval processes.

The Digital Process Automation toolset is offered for Health Cloud, Financial Services Cloud, and Manufacturing Cloud customers.

SEE ALSO:

[Decision Table](#)

[Use Intelligent Document Automation](#)

[Data Processing Engine](#)

Monitor Documents as They're Transformed

Users can now view a document and the new record window simultaneously when they create records from transformed documents.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Health Cloud is enabled.

How: Your users create the record using the **Transform Document** quick action.

The screenshot displays the 'New Account' form in Salesforce. On the left, a document titled 'Sample Patient Health History Form' is previewed. The document contains fields for Patient Name, Date of Birth, Sex, Height, Weight, and a series of medical history questions. On the right, the 'New Account' form is visible, with sections for 'Account Information' (including Account Owner, Account Name, Phone, Fax, Website) and 'Additional Information' (including Type, Industry, Annual Revenue, and Description). The form has 'Back' and 'Save' buttons at the bottom right.

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](#)

[Salesforce Marketing Cloud Facebook Page](#)

Mobile

Get more done in the Salesforce mobile app with new features like the new full-width tablet app experience on iPad and Android tablets. Briefcase Builder helps make offline record data available to your users. Mobile Publisher offers users new distribution methods to best fit your org's needs.

IN THIS SECTION:

[Salesforce Mobile App](#)

Enhance your mobile experience with a personalized landing page using Mobile Home (generally available), view Lightning record pages in full-width on tablets (beta), and use the new in-app Lightning-based navigation changes.

[Briefcase Builder](#)

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, groups, 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.

[Mobile Publisher](#)

Improved sandbox switching for the Experience Cloud app (iOS), URL management, and new distribution methods to best suite your org's needs.

Salesforce Mobile App

Enhance your mobile experience with a personalized landing page using Mobile Home (generally available), view Lightning record pages in full-width on tablets (beta), and use the new in-app Lightning-based navigation changes.

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 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 assigned user profiles and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of October 10, 2021.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Browser and Operating System			
Salesforce Mobile App Requirements Have Changed on page 439	✓	✓	
Data Access and Views			
Help Your Users Personalize Their Content With Mobile Home (Generally Available) on page 440	✓	✓	
Run Your Business on Tablets (Beta) on page 442	✓	✓	✓
Sales Features			
Track Forecast Categories Your Way on page 489	✓	✓	✓

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Access and Security			
Protect Your Data with Enhanced Mobile Security Updates on page 441	✓	✓	✓
Miscellaneous Enhancements			
Limited Access for New Users with Community Licenses on page 442	✓	✓	
Take Advantage of the Salesforce Mobile App Defaulting to Lightning Apps on page 443	✓	✓	

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. Here's the list of devices for Winter '22.

Platform	Phones	Tablets
Android	<ul style="list-style-type: none"> Google Pixel 4 XL Google Pixel 3 Samsung Galaxy S10 / S10+ / S10e Samsung Galaxy S9 / S9+ Samsung Galaxy S8 / S8+ Samsung Galaxy S7 Samsung Galaxy Note 10+ Samsung Galaxy Note 9 Samsung Galaxy Note 8 	<ul style="list-style-type: none"> Samsung Galaxy S7 Tablet Samsung Galaxy S6 Tablet Samsung Tab A (8 inch) Tablet
iOS	<ul style="list-style-type: none"> iPhone 12 Pro / Pro Max / mini iPhone 12 iPhone 11 Pro / Pro Max iPhone 11 iPhone XR iPhone XS / XS Max iPhone X iPhone 8 / 8 Plus iPhone 7 / 7 Plus 	<ul style="list-style-type: none"> iPad Pro 10.5" iPad Air 2 iPad Mini 4

Platform	Phones	Tablets
	<ul style="list-style-type: none">• iPhone SE• iPhone 6S	

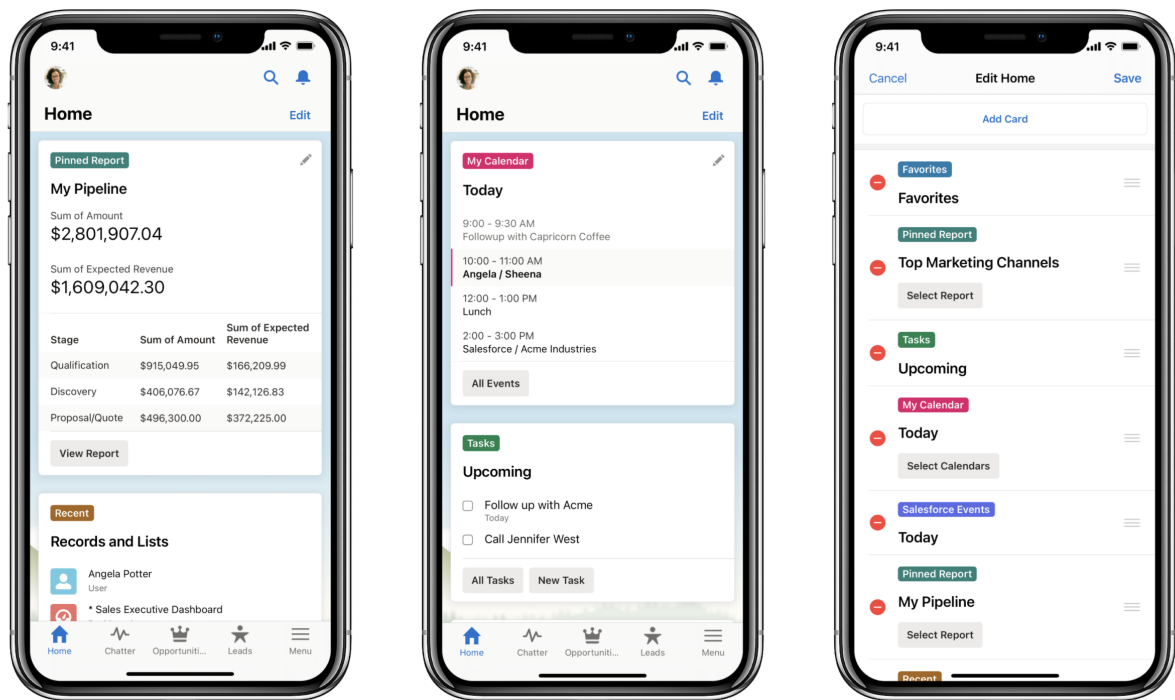
Customers aren’t blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce might not be able to replicate some issues for customers using Salesforce on untested devices on due to manufacturer-specific customizations. To allow for innovation and to keep Salesforce 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.

Help Your Users Personalize Their Content With Mobile Home (Generally Available)

Mobile Home is generally available as a standard navigation item for the Salesforce mobile app on iOS and Android. Mobile Home is a landing page that your end users can personalize with the content they care about most. As an admin, you can add Mobile Home to any phone-activated Lightning app, or to the Mobile Only navigation, the same way you customize any other navigation tab. After it’s added, the Mobile Home tab appears only on users’ mobile devices and doesn’t show up on desktop. Set it as the first tab and your mobile users have a brand new landing screen every time they open the app.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

Why: Mobile Home is a new standard navigation item for the Salesforce mobile app.



SEE ALSO:
[Salesforce Help: Enable Mobile Home for iOS and Android](#)

More protection has been built into the enhanced mobile security for the Salesforce mobile app. You can now enforce new policies such as enforcing certificate pinning (iOS only). If a user tries to use the app and the server's certificate doesn't match the expected value, a secure connection won't be established. These new policies further secure your Salesforce app data and users' personal data.

Who: Available for users with the Enforce Enhanced Mobile App Security user permission.

- **Authentication Server Certificate Pinning:** Certificate pinning for the authentication server URLs where the user provides credentials to log in.
- **Resource Certificate Pinning:** Certificate pinning for the resource URLs used by the app to fetch data for the user.

ios

Android

Authentication Server Certificate Pinning

Certificate pinning for the authentication server urls where the user provides credentials to login.

✓

Active

* Info

Info

* Domain Name

* Certificate Hash

☐

Include Subdomain

* Domain Name

* Certificate Hash

☐

Include Subdomain

Resource Certificate Pinning

Certificate pinning for the resouce urls used by the app to fetch data for the user.

✓

Active

* Info

Info

* Domain Name

* Certificate Hash

☐

Include Subdomain

Salesforce Help: Mobile Application Management (MAM) with Enhanced Mobile App Security

Limited Access for New Users with Community Licenses

For new Salesforce orgs created after the Winter '22 release, users with community licenses can't log in to the Salesforce mobile app. When they open the Salesforce mobile app, these users see a blocking screen with this message: "Your license does not include access to the mobile app. Please contact your administrator." Because app features and functionalities aren't available to these users, they're better served through the browser experience. Community users in orgs created before Winter '22 aren't affected by this change.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions except Database.com.

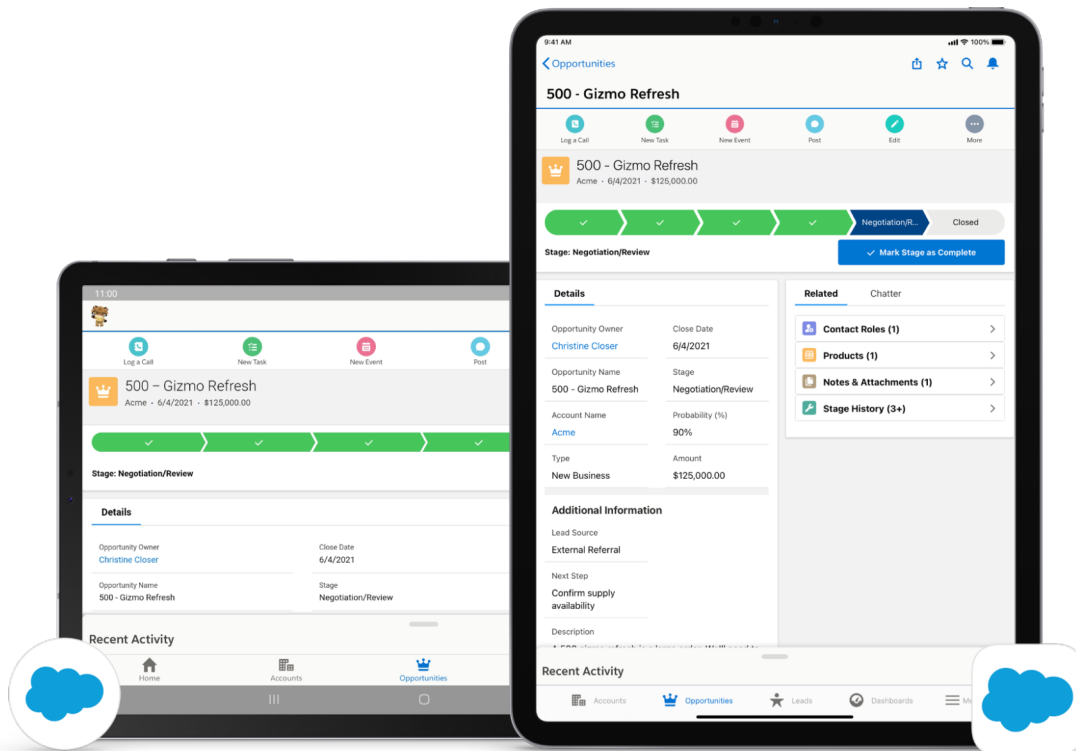
When: Winter 22' release for new organizations only.


Run Your Business on Tablets (Beta)

The new full-width tablet app experience is now available in the Salesforce mobile app on iPad and Android tablets as an administrator opt-in beta feature. This experience uses the tablet's full screen to display desktop record layouts with mobile optimized components. In addition, it supports Lightning apps, full-width Lightning record pages, Lightning navigation, and Einstein Analytics.

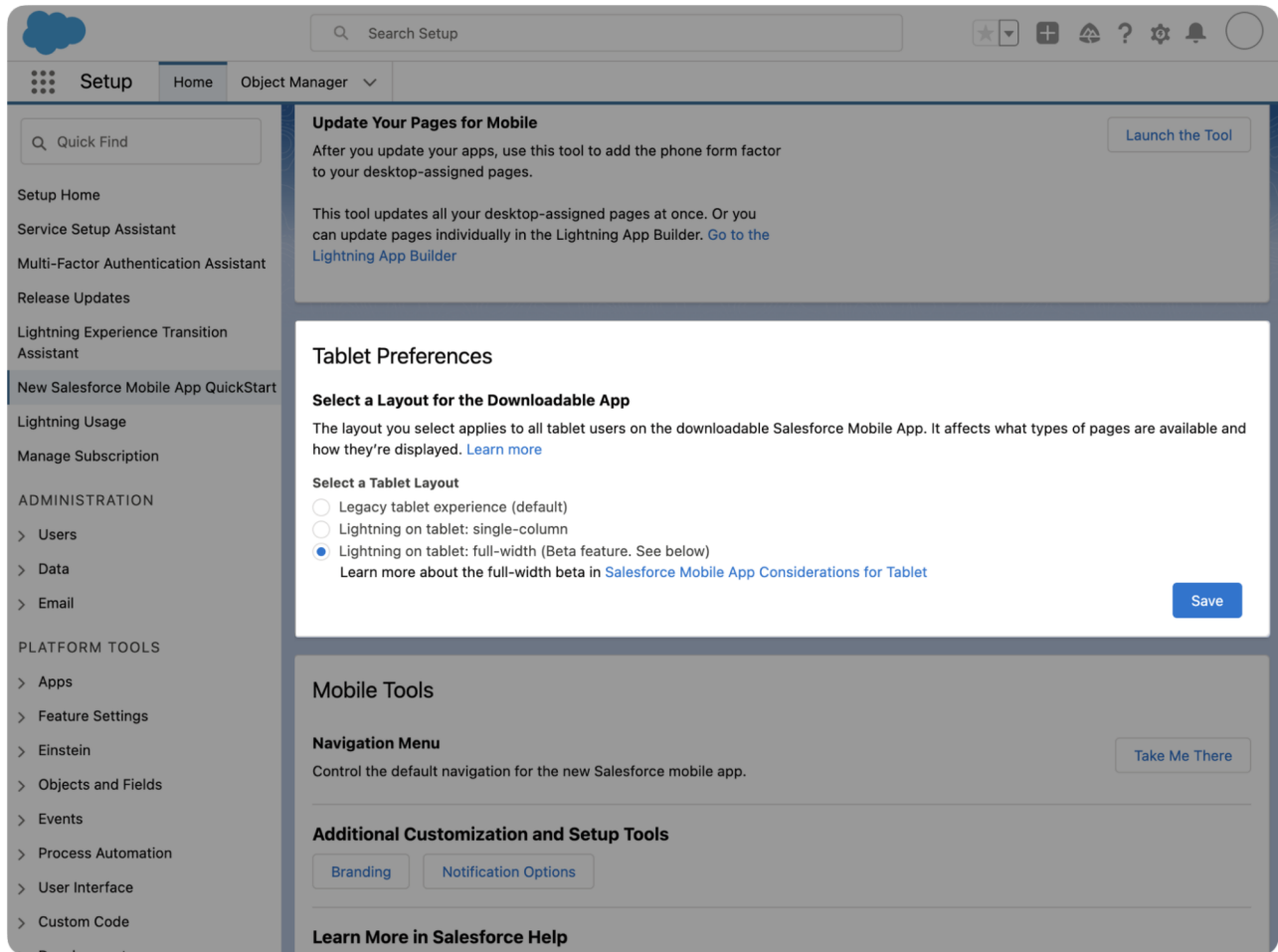
Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.


Why: The full-width view is a new way to experience the Salesforce mobile app on tablet.




 **Warning:** If you're using the legacy Salesforce1 tablet experience, it's recommended to begin testing and using this new tablet experience in your organization. You can opt in to the beta by using the instructions on this page.

How: To turn on the full-width Lightning on tablet experience, select the Lightning on tablet: full-width option. 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 (Beta)**.



 **Warning:** The full-width tablet experience is offered as a part of an opt-in beta and has some known limitations. For more information, see [Salesforce Mobile App Considerations](#) for Tablets.

 **Note:** We provide this feature to customers through a beta 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, press releases, or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for 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](#)

Take Advantage of the Salesforce Mobile App Defaulting to Lightning Apps

The Salesforce mobile app now defaults to a phone-activated Lightning app if one is available to the user. Previously, all users landed on a [Mobile Only](#) app navigation, and they could switch to a different Lightning app using the App Launcher from the Menu tab. The Salesforce mobile app now selects the first available Lightning app by default—instead of Mobile Only—which results in a change to the app's bottom navigation bar. Users who don't have access to any phone-activated Lightning apps still default to Mobile Only.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions except Database.com.

Why: The navigation bar in the Mobile Only app doesn't always match what users see in Lightning Experience. This improvement allows users to take advantage of the latest Lightning features, like consistent navigation across devices.

SEE ALSO:

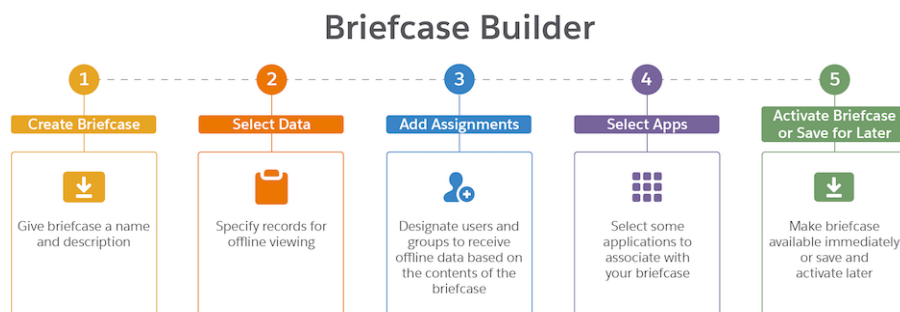
[Salesforce Help: Lightning Apps by Default \(can be unavailable during release preview\)](#)

Briefcase Builder

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, groups, 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 \(can be outdated or unavailable during release preview\)](#)

Mobile Publisher

Improved sandbox switching for the Experience Cloud app (iOS), URL management, and new distribution methods to best suite your org's needs.

IN THIS SECTION:

[Mobile Publisher Requirements](#)

Salesforce is revising the requirements for using the Mobile Publisher for Salesforce App and Experience Cloud app. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the experience.

[New Distribution Methods for Your Branded Apps](#)

Mobile Publisher lets you choose whether you want Salesforce to manage the release of your branded app, or if you want to manage the release of the app on your own.

[Manage How URLs Open in the Experience Cloud App](#)

URL Management lets you configure how URLs open in the Experience Cloud app.

[Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App](#)

Make the mobile publisher app navigation easier to use for iOS users by including both the hamburger menu and the back button in your site header.

[Improved Sandbox Switching for the Mobile Publisher for Experience Cloud App \(iOS\)](#)

Quickly switch between testing Production, Sandbox, and Custom Experience Cloud sites.

Mobile Publisher Requirements

Salesforce is revising the requirements for using the Mobile Publisher for Salesforce App and Experience Cloud app. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the experience.

Mobile Platform Requirements

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

Operating System and Version Requirements

Android 8.0 or later

iOS 13.4 or later

Mobile Devices Used for Testing

Salesforce performs automated and manual testing of the Mobile Publisher for Salesforce App and Experience Cloud app for iOS and Android on a select set of mobile devices. Here's the list of devices for Winter '22.

Platform	Phones	Tablets
Android	<ul style="list-style-type: none"> Google Pixel 4 XL Google Pixel 3 Samsung Galaxy S10 / S10+ / S10e Samsung Galaxy S9 / S9+ Samsung Galaxy S8 / S8+ Samsung Galaxy S7 Samsung Galaxy Note 10+ Samsung Galaxy Note 9 Samsung Galaxy Note 8 	
iOS	<ul style="list-style-type: none"> iPhone 12 Pro / Pro Max / mini 	

Platform	Phones	Tablets
	<ul style="list-style-type: none"> • iPhone 12 • iPhone 11 Pro / Pro Max • iPhone 11 • iPhone XR • iPhone XS / XS Max • iPhone X • iPhone 8 / 8 Plus • iPhone 7 / 7 Plus • iPhone SE • iPhone 6S 	

Customers aren't blocked from using Mobile Publisher for Salesforce App on untested devices as long as they meet current platform requirements. Salesforce may not be able to replicate some issues for customers using Mobile Publisher for Salesforce App on untested devices on due to manufacturer-specific customizations. The list of Salesforce-tested devices is subject to change, with or without advance notice.

New Distribution Methods for Your Branded Apps

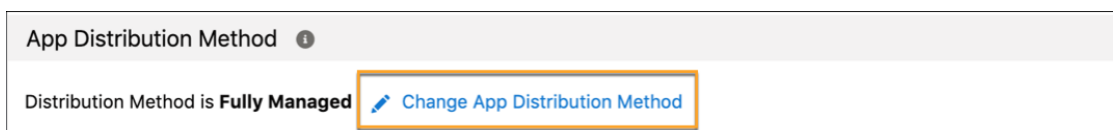
Mobile Publisher lets you choose whether you want Salesforce to manage the release of your branded app, or if you want to manage the release of the app on your own.

Where: This change applies to Mobile Publisher setup accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions.

Who: To configure distribution methods, users need a Mobile Publisher license and the Manage mySalesforce Apps user permission.

How: The new App Distribution Method section is available to both Mobile Publisher for Salesforce app and Experience Cloud app.

- **Full Managed:** Salesforce builds, releases, and manages the lifecycle of the app.
- **Binary Upload (Beta):** Salesforce builds and uploads the app to your store account. You submit the store listing information (screenshots, description, and so on) and manage the release of the app.



App Distribution Method

Choose Your App Distribution Method

You can select distribution method. The distribution method you choose is important so choose carefully.

Choose a method

Fully Managed

Salesforce builds, releases, and manages the life cycle of the app.

Binary Upload (Beta)

Salesforce builds and uploads the app to your store account. You submit the store listing information (screenshots, description, and so on) and manage the release of the app.

Next

SEE ALSO:

[Salesforce Help: App Distribution Methods](#)

Manage How URLs Open in the Experience Cloud App

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.

You can specify up to 20 URLs for each type of opening. URLs must be comma-separated.



Note: URL Management doesn't support HTTP:// URLs.

The screenshot displays the 'URL Management' interface. It contains three sections, each with a header, a text input field, and a character count:

- WebView URLs**: The input field contains 'https://www.salesforce.com, /webview/path' and the count is 41/20000.
- In-App Browser URLs**: The input field contains 'https://www.salesforce.com, /in/app/browser/path' and the count is 48/20000.
- External Browser URLs**: The input field contains 'https://www.salesforce.com, /external/browser/path' and the count is 50/20000.

SEE ALSO:

[Salesforce Help: Manage How URLs Open in the Experience Cloud App](#)

Display Both the Hamburger Menu and the Back Button in the iOS Mobile Publisher App

Make the mobile publisher app navigation easier to use for iOS users by including both the hamburger menu and the back button in your site header.

Where: This change applies to iOS Mobile Publisher Apps in Enterprise, Performance, Unlimited, and Developer editions.





Improved Sandbox Switching for the Mobile Publisher for Experience Cloud App (iOS)

Quickly switch between testing Production, Sandbox, and Custom Experience Cloud sites.

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

Who: To switch between sites, users need a Mobile Publisher license, and have Experience Cloud site access.

How: Long press and hold your branded app icon to bring up the site switching menu.

Send Feedback	
Switch Experience Cloud Site	
Edit Home Screen	
Remove App	

SEE ALSO:

[Salesforce Help: Switch Between Testing Modes in the Experience Cloud App](#)

myTrailhead

Enhance your myTrailhead learning experience with new options for fulfilling your company's unique training and enablement requirements.

IN THIS SECTION:

[Deliver Learning Content for Specific Audiences](#)

Support the unique learning and enablement requirements of your user groups. With content permissions in myTrailhead, you can create multiple content collections, which are groups of myTrailhead content that you can make available to specified users. Only learners with permission to access a particular content collection can view and complete the content included in the collection.

[Simplify Metadata for myTrailhead Units](#)

Now your myTrailhead writers can focus more on content, not messy metadata. When editing a unit, writers can ignore Tags filters and simply enter the points that a learner can earn by completing the unit. Previously, when editing a unit in Trailmaker Content, a writer had to select a filter from the Tags category. However, most filters weren't applicable for a company's custom content. Typically, myTrailhead writers could select only the General tag—and tagging every unit with the same filter didn't help learners find the content that they needed.

[Track the Success of Your myTrailhead Content](#)

Collect immediate feedback from learners and help inform your company's ongoing training and enablement strategy. When a learner completes a module on your myTrailhead subdomain, they can rate the module on a five-star scale. Then your publishing team can review ratings from all your modules and track how each module performs, which can help guide content planning.

[Edit and Save Trailmixes with Confidence](#)

Let content creators curate your company's enablement content more efficiently and confidently. When a user edits a trailmix on your myTrailhead subdomain, they now have more options for saving and confirming their changes. These enhancements help eliminate potential errors when creating or modifying trailmixes for your learners.

Connect to a SIFM-Enabled myTrailhead Subdomain in Slack

If your company uses Salesforce Identity for myTrailhead (SIFM) for authenticating users to your myTrailhead subdomain, bring your company's enablement experience to users where they work. The Trailhead Slack app now connects to a myTrailhead subdomain that uses SIFM authentication. This enhancement helps your users find, share, and complete myTrailhead content in the flow of work. And it provides more parity and makes it easier for your company to switch from TBID to SIFM, which is the authentication provider that we recommend. Previously, only myTrailhead subdomains that used Trailblazer.me (TBID) authentication could connect to the Trailhead Slack app.

Connect to a SIFM-Enabled myTrailhead Subdomain on Mobile Devices

If your company uses Salesforce Identity for myTrailhead (SIFM) for authenticating users to your myTrailhead subdomain, bring your company's enablement experience to users on the go. The Trailhead GO app for mobile devices now connects to a myTrailhead subdomain that uses SIFM authentication. This enhancement helps your users find and complete myTrailhead content wherever they are. And it provides more parity and makes it easier for your company to switch from TBID to SIFM, which is the authentication provider that we recommend. Previously, only myTrailhead subdomains that used Trailblazer.me (TBID) authentication could connect to the Trailhead GO mobile app.

Broaden Your myTrailhead Content to More International Audiences

All myTrailhead subdomains now support Korean and Chinese (Simplified) language options, which allow users to view the myTrailhead user experience in the selected language. These language options supplement other languages already available so that your company can deliver personalized, role-specific enablement content to users in their preferred language.

Deliver Learning Content for Specific Audiences

Support the unique learning and enablement requirements of your user groups. With content permissions in myTrailhead, you can create multiple content collections, which are groups of myTrailhead content that you can make available to specified users. Only learners with permission to access a particular content collection can view and complete the content included in the collection.

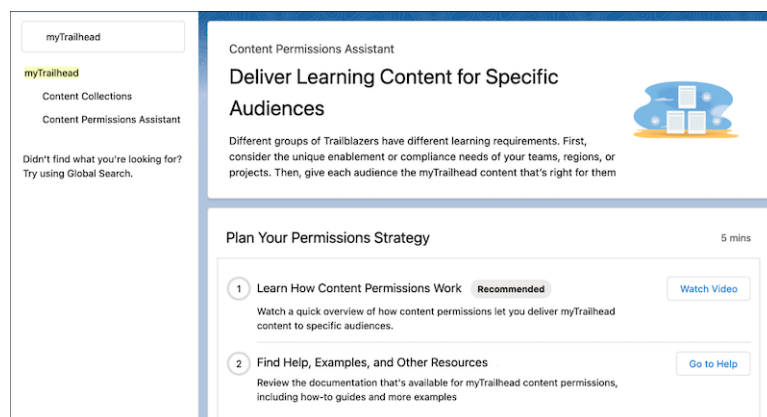
Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

Who: This change affects users differently depending on their enabled permissions.

Users with the View Setup and Configuration permission:

Can access the new myTrailhead Content Permissions Assistant page from Setup in your Salesforce org. This assistant provides a guided workflow for:

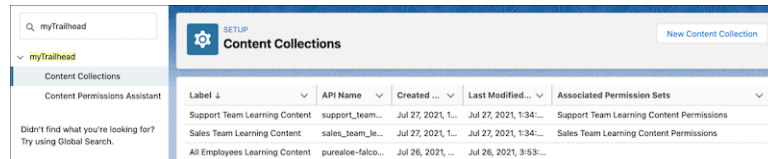
1. Creating content collections
2. Enabling access to specific content collections through permission sets
3. Assigning users to permission sets and their enabled content collections



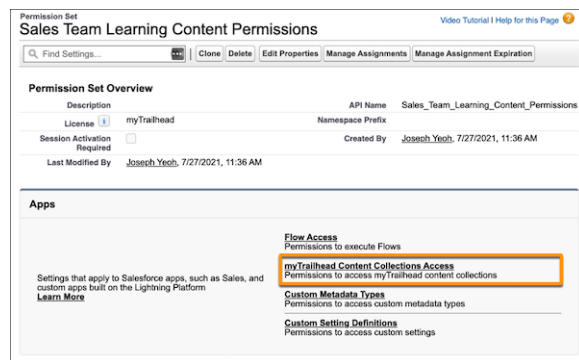
Users with the new myTrailhead Manage Content Collections permission:

Can access the new Content Collections page from Setup in your Salesforce org. This page provides a list view for:

- Creating, editing, and deleting content collections
- Viewing the permission sets for each content collection

**Users with the Manage Profiles and Permission Sets permission:**

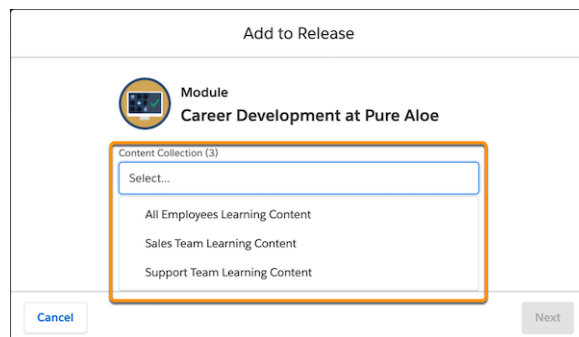
Can access the new myTrailhead Content Collections Access settings from a permission set's overview page. Admins can use these settings to enable specific content collections for users assigned to that permission set.

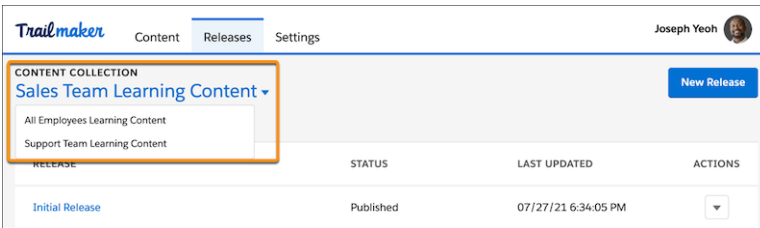
**Users with the myTrailhead View All Content permission (previously named myTrailhead Content Access):**

Can access all content from any collection on your myTrailhead subdomain. They can also run reports on content from any collection.

Users with the myTrailhead Release Management permission:

Can assign trails and modules to particular content collections when they prepare a release with Trailmaker. They can also view the releases associated with each content collection.





Why: Previously, all content in your myTrailhead subdomain was published under a single namespace. A subdomain had only one namespace, so all users with access to your myTrailhead subdomain could access all content. Now, a namespace is known as a content collection, and a subdomain supports multiple content collections.

How: If your company is new to myTrailhead, get started by provisioning your subdomain. During this process, you set up your first content collection. Then, as you complete the remaining configuration steps, you set up user permissions and create other content collections.

If your company has an existing myTrailhead subdomain with published content, your current learning experience isn't disrupted by this change:

- All your existing content belongs to a single content collection, which inherits the API name of the namespace that you created when you set up your subdomain.
- All your current learners can still access existing content in that single collection.

You can start creating more content collections, moving existing content to the new collections, and updating your learner permissions.

SEE ALSO:

[Salesforce Help: Allow Learners to Access Specific Content Collections](#)

[Salesforce Help: Considerations for Getting Started with Content Collections](#)

[Salesforce Help: Examples of Content Collections](#)

[Salesforce Help: Migrate Published Content to a Different Content Collection](#)

[Salesforce Help: Set Up Your myTrailhead Subdomain and First Content Collection](#)

Simplify Metadata for myTrailhead Units

Now your myTrailhead writers can focus more on content, not messy metadata. When editing a unit, writers can ignore Tags filters and simply enter the points that a learner can earn by completing the unit. Previously, when editing a unit in Trailmaker Content, a writer had to select a filter from the Tags category. However, most filters weren't applicable for a company's custom content. Typically, myTrailhead writers could select only the General tag—and tagging every unit with the same filter didn't help learners find the content that they needed.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This change becomes effective in September 2021.

Who: This change affects users with the myTrailhead Content Creation permission. These users are often writers who edit units in the Trailmaker Content app in your myTrailhead subdomain.

Why: This change complements a previous update in which Tags filters were also removed from trails and modules. The Tags filter category no longer appears anywhere in Trailmaker.

How: When you edit a unit in Trailmaker Content, an editable Points field (1) replaces the Tags dropdown that was previously available. The Time field (2) also appears in a new location, which helps simplify the editing experience.

The screenshot shows the Trailmaker interface for editing a unit. The form has the following fields:

- Title:** Learn About Well-Being at Our Company
- API Name:** learn-about-well-being-at-our-company-uas
- Points:** 100 (highlighted with an orange box and labeled '1')
- Time:** 10 mins (highlighted with an orange box and labeled '2')

There is an 'Edit Assessment' button and a 'Saved at 9:57 AM' status at the top right.

For compatibility with other systems, backpacks still include data for Tags filters, but those filters are no longer validated when importing or exporting a backpack.

When you edit a unit that was created before this change, the Points field shows the total points that were previously allocated to multiple tags. What happens to these points when you edit the unit?

- If you edit the unit's content without modifying its points, saving the unit doesn't change the applied tags. The current points remain allocated across the applied tags.
- If you edit the unit's points, saving the unit applies all those points to the General tag.

For new units that you create after this change becomes effective, Trailmaker assigns all the entered points to the General filter by default.

```
"filters": {
  "tags": [
    "general"
  ]
},
"units": [
  {
    "id": "unit-id",
    "title": "${modules.module-id.units.unit-id.title}",
    "completion_time_mins": time,
    "points": {
      "general": 100
    }
  }
]
```

SEE ALSO:

[Salesforce Help: Create a Module in Trailmaker Content](#)

[Salesforce Help: Add a Unit to an Existing Module](#)

[Salesforce Help: Metadata for Trails, Modules, and Units](#)

[Salesforce Help: Backpacks for Trails and Modules](#)

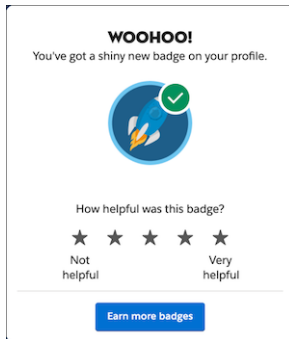
Track the Success of Your myTrailhead Content

Collect immediate feedback from learners and help inform your company's ongoing training and enablement strategy. When a learner completes a module on your myTrailhead subdomain, they can rate the module on a five-star scale. Then your publishing team can review ratings from all your modules and track how each module performs, which can help guide content planning.

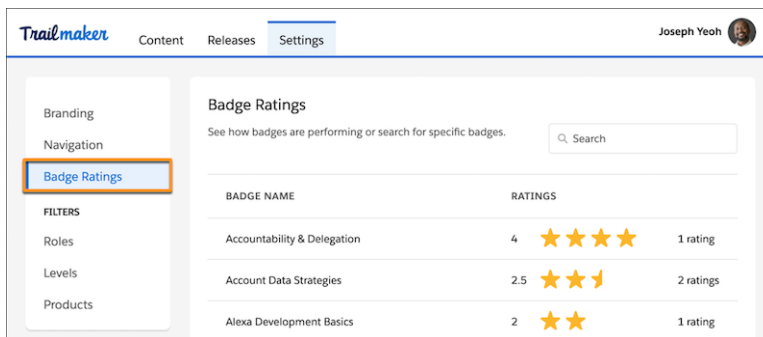
Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This change becomes effective in October 2021.

Who: For learners—users with permission to access at least one content collection in your myTrailhead subdomain—this change adds a window that appears after completing all units in a module. A learner can rate a module only one time.



For users with the myTrailhead Branding Management permission, the Trailmaker Settings app in your myTrailhead subdomain includes a new Badge Ratings tab.



How: This change is available by default for all myTrailhead subdomains. The ratings data is stored in a system that's compliant with General Data Protection Regulation (GDPR), and isn't visible to learners. To disable this change in your subdomain, submit a Salesforce Customer Support case.



Note: This change is available only for the desktop experience. Badge ratings aren't supported in the Trailhead GO mobile app or in Learning Paths in Lightning Experience. Badge ratings data isn't available in Trail Tracker reports.

Edit and Save Trailmixes with Confidence

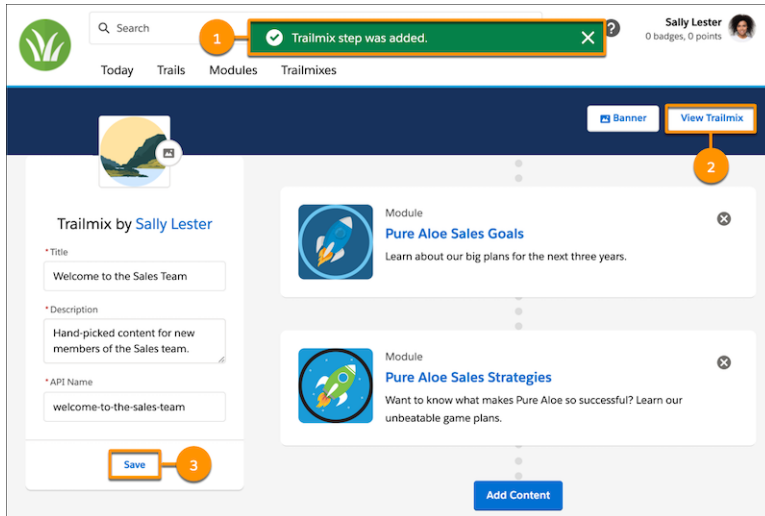
Let content creators curate your company's enablement content more efficiently and confidently. When a user edits a trailmix on your myTrailhead subdomain, they now have more options for saving and confirming their changes. These enhancements help eliminate potential errors when creating or modifying trailmixes for your learners.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This change becomes effective in December 2021.

Who: This change applies to users who have permission to access at least one content collection on your myTrailhead subdomain.

How: The Edit Trailmix page includes these enhancements.



- A successful save notification (1) indicates that a user has modified the trailmix's content and those changes were saved automatically.
- A new View Trailmix button (2) allows a user to navigate from the Edit Trailmix page and view the published trailmix on your myTrailhead subdomain.
- A new Save button for trailmix metadata (3) allows a user to manually save changes to a trailmix's title, description, or API name.

SEE ALSO:

[Salesforce Help: Create a Trailmix](#)

[Salesforce Help: Add a Task or External Content to a Trailmix](#)

[Salesforce Help: Rearrange Trailmix Content](#)

[Salesforce Help: Delete Trailmix Content](#)

Connect to a SIFM-Enabled myTrailhead Subdomain in Slack

If your company uses Salesforce Identity for myTrailhead (SIFM) for authenticating users to your myTrailhead subdomain, bring your company's enablement experience to users where they work. The Trailhead Slack app now connects to a myTrailhead subdomain that uses SIFM authentication. This enhancement helps your users find, share, and complete myTrailhead content in the flow of work. And it provides more parity and makes it easier for your company to switch from TBID to SIFM, which is the authentication provider that we recommend. Previously, only myTrailhead subdomains that used Trailblazer.me (TBID) authentication could connect to the Trailhead Slack app.

Where: This change applies to:

- myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.
- The Trailhead Slack app, which is available in the Slack App Directory for use in the latest version of the Slack desktop, mobile, and web apps.

When: This change is available in December 2021.

Who: This change affects all users who have permission to access at least one content collection in a SIFM-enabled myTrailhead subdomain.

How: To connect the Trailhead Slack app to a SIFM-enabled myTrailhead subdomain, add the app to your workspace. Then, in any Slack message, enter `/trailhead-login`, and pass the subdomain's login URL as a parameter. Use the subdomain that you receive from

your Salesforce admin. For example, to connect to a subdomain with the My Domain URL `https://purealoe.my.salesforce.com`, enter:

```
/trailhead-login https://purealoe.my.salesforce.com
```

SEE ALSO:

[Salesforce Help: Considerations for Selecting an Authentication Provider](#)

[Salesforce Help: Request to Switch Your Authentication Provider](#)

[Salesforce Help: Find and Share myTrailhead Content in Slack](#)

[Salesforce Help: Connect the Trailhead App in Slack to a Trailhead or myTrailhead Account](#)

Connect to a SIFM-Enabled myTrailhead Subdomain on Mobile Devices

If your company uses Salesforce Identity for myTrailhead (SIFM) for authenticating users to your myTrailhead subdomain, bring your company's enablement experience to users on the go. The Trailhead GO app for mobile devices now connects to a myTrailhead subdomain that uses SIFM authentication. This enhancement helps your users find and complete myTrailhead content wherever they are. And it provides more parity and makes it easier for your company to switch from TBID to SIFM, which is the authentication provider that we recommend. Previously, only myTrailhead subdomains that used Trailblazer.me (TBID) authentication could connect to the Trailhead GO mobile app.

Where: This change applies to:

- myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.
- The Trailhead GO mobile app, which is available for iOS, iPadOS®, or Android™ devices.

When: This change is available in December 2021.

Who: This change affects all users who have permission to access at least one content collection in a SIFM-enabled myTrailhead subdomain.

How: To connect the Trailhead GO app to a SIFM-enabled myTrailhead subdomain, follow the link that you receive from your Salesforce admin.

SEE ALSO:

[Salesforce Help: Considerations for Selecting an Authentication Provider](#)

[Salesforce Help: Request to Switch Your Authentication Provider](#)

[Salesforce Help: Access myTrailhead Content on Mobile Devices](#)

[Salesforce Help: Create a Login Link to Authenticate Users to a SIFM-enabled Subdomain on Mobile Devices](#)

Broaden Your myTrailhead Content to More International Audiences

All myTrailhead subdomains now support Korean and Chinese (Simplified) language options, which allow users to view the myTrailhead user experience in the selected language. These language options supplement other languages already available so that your company can deliver personalized, role-specific enablement content to users in their preferred language.

Where: This change applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

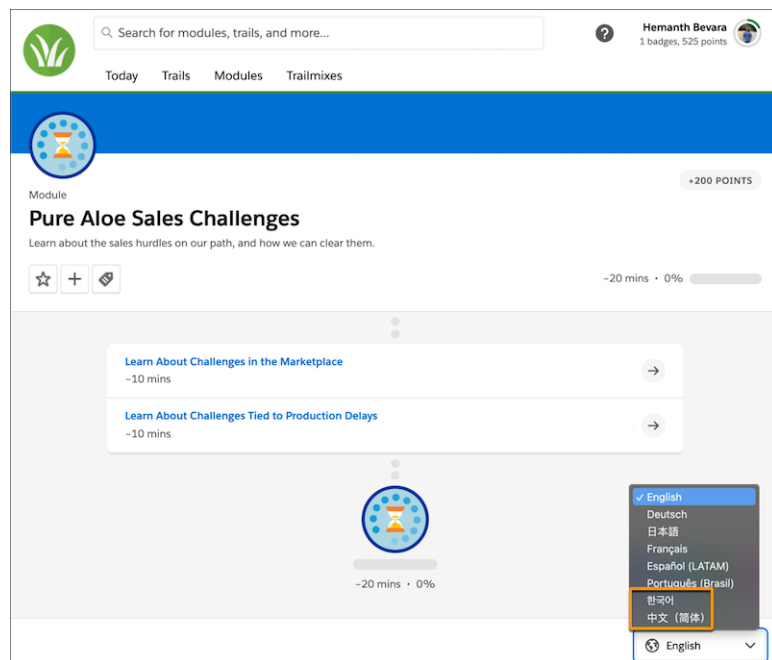
When: This enhancement is available in December 2021.

Who: This enhancement affects users differently depending on their enabled permissions. See the *How* section for details.

How: This enhancement is available by default for all myTrailhead subdomains, and affects the user experience of other tools, such as Trailmaker, Trail Tracker, Slack, and Trailhead GO.

In a myTrailhead production environment on a desktop browser

Users with permission to access at least one content collection in your myTrailhead subdomain can select the new languages from the language dropdown in the footer of every page. Selecting a language shows localized labels for default elements: tabs, search, points, completion time, content types, and so on. Localized content displays only if your company has published content that's been localized for those languages.



In the Trailmaker Content app in your subdomain

Users with the myTrailhead Content Creation permission can import trail or module backpacks that include content localized for Korean and Chinese (Simplified) in folders named `ko-KR` and `zh-CN`, respectively.

In the Trailhead app for Slack

Users with permission to access at least one content collection in your myTrailhead subdomain can:

- Experience the app in Korean and Chinese (Simplified).
- Find and share content that's been localized for Korean and Chinese (Simplified).

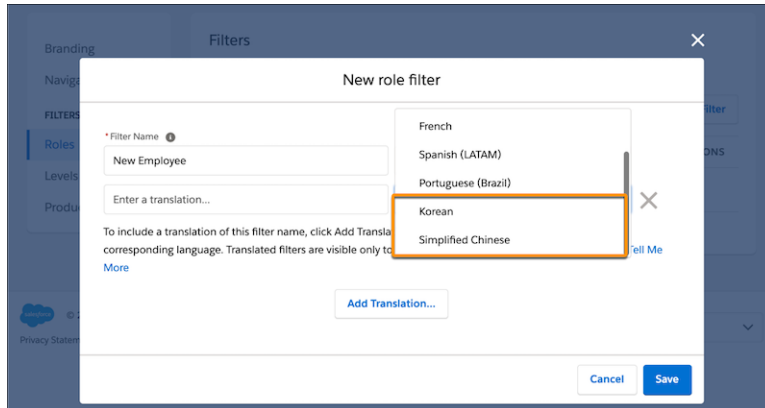
In the Trailhead GO app for mobile devices

Users with permission to access at least one content collection in your myTrailhead subdomain can:

- Experience the app in Korean and Chinese (Simplified).
- Access content that's been localized for Korean and Chinese (Simplified).

In the Trailmaker Settings app in your subdomain

Users with the myTrailhead Branding Management permission can localize custom filter values into Korean and Chinese (Simplified) in Trailmaker Settings.



In the Trail Tracker app in Salesforce

Admins can view the Trail Tracker app's labels in Korean and Chinese (Simplified). Data and dashboards still appear in English only.

SEE ALSO:

[Salesforce Help: Considerations for Languages on myTrailhead](#)

[Salesforce Help: Guidelines for Localizing Files in a Backpack](#)

[Salesforce Help: Add a Custom Filter for myTrailhead Content](#)

Pardot

Getting started with Pardot is easier than ever with the new setup assistant in Marketing Setup. You also get automation extensibility and landing page builder enhancements, Engagement Studio support for drag-and-drop builder emails, and Einstein Key Accounts Identification on list views. The key accounts feature and mailability changes are generally available.

IN THIS SECTION:

[Marketer Experience](#)

Try the drag-and-drop builder to create effective landing pages. Use new builder emails in Engagement Studio. Plus, explore Pardot extensibility enhancements and mailability improvements.

[Data and Content](#)

Set up Einstein Discovery for your B2B Marketing Analytics Plus apps in fewer clicks and get updated fields in apps that use Object Sync for Pardot.

[Manage and Extend Pardot](#)

Now you can bring your own encryption keys, and do more with the Pardot API.

Marketer Experience

Try the drag-and-drop builder to create effective landing pages. Use new builder emails in Engagement Studio. Plus, explore Pardot extensibility enhancements and mailability improvements.

IN THIS SECTION:

[Send Slack Notifications to Pardot Users with Completion Actions \(Beta\)](#)

Speed up your pipeline with a completion action that notifies your team in Slack when prospects interact with your marketing assets. Automatically send promising new leads to your Sales team, and share important prospect activity data with your Marketing team.

[Build Landing Pages Faster with Drag-And-Drop Editor](#)

If you're using the Pardot Lightning App, you can now build landing pages inside the Lightning Experience. After you enable the feature, users can create a landing page record in a couple of clicks. Plus, stay on brand by encouraging users to start from saved templates and to select approved images from your Salesforce CMS repository.

[Take Your Automations Further with Pardot Extensibility Enhancements](#)

Now you can improve your Pardot automations with valuable external prospect data from your third-party apps. For each third-party app you use to collect prospect data, set up a Marketing App Extension. Then, add each activity type you want to capture. For example, capture when a prospect attends a webinar through your third-party webinar service and use that data in any of your Pardot automations or Engagement Studio programs. You can also view external activity data on individual prospect records.

[Push Emails from Lightning Experience into Engagement Programs](#)

When you create emails in the drag-and-drop editor in Lightning Experience, you can now save them for use in Engagement Studio. Create your email content and activate it for use in automations.

[Create Custom Components for the Email Content Builder](#)

You can now create custom email components to use in Pardot's drag-and-drop builder. Custom components help marketers and managers create more engaging email content for their customers.

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Now you get tracker domain support for the emails that you build in the interactive Pardot email experience. When you send an email content record, you can indicate which domain to use with the send so that links are rewritten with your preferred domain.

[Enjoy Improved Prospect Mailability Insights \(Generally Available\)](#)

This feature, now generally available, includes some improvements since the last release. All prospect records include a mailability section so marketers can see what type of emails a prospect can receive and what their bounce status is. Prospect mailability and opt-in status is easily updated via automation rules, prospect imports, and Engagement Studio programs. Plus, the Do Not Email field and the Opt Out field on prospects records are no longer connected, so they can't override each other.

[Reset Bounce Counts on Prospect Records](#)

Users with the Pardot Administrator or Marketing user roles can now reset the count for hard or soft bounces on prospect records when bounce issues are resolved. When bounce counts are reset, the prospect becomes eligible to receive emails. If the next email sent to that address returns either a hard or soft bounce, the prospect is marked Undeliverable again.

[Customize Prospect Unsubscribe and Resubscribe Page Content](#)

Your marketing team can now control all the messaging that appears on Pardot unsubscribe and resubscribe pages. Customizable fields now include the unsubscribe prompt, plus button text and confirmation messages for the unsubscribe and resubscribe pages.

[See When and How Segmentation Prospect Lists Were Updated](#)

To give marketing users more insight on their prospect lists, the segmentation list view in Pardot now includes two new columns: Updated At and Updated By. These columns show the date and time the list was last updated, and which user made the update. Marketers can filter the list view based on column data.

[Unarchived Dynamic Lists Retain Prospects](#)

When you unarchive a dynamic list, the list retains the prospects that were on it when it was archived. Then the list rules are rerun to look for matching prospects. The prospect count can change after the rules are rerun, so we recommend that you wait to receive a confirmation email that the list is restored before you send to it.

[View IP Address for Prospect Activities in Pardot](#)

To better understand your engagement data, you can view the IP address associated with most prospect activities on prospect records in Pardot. You can use this additional insight to create more effective visitor activity filters. For example, if you notice a lot of test clicks coming from a single IP, you can filter out that activity based on the IP.

[New and Updated Pardot User Permissions](#)

As part of Pardot's mailability improvements, new user permissions are available: Update Do Not Email field, Reset hard bounce count, and Reset soft bounce count. The user permission Toggle Opt In Status is now Update Opted Out field. Any users that previously had the Toggle Opt In Status permission now have the Update Opted Out field permission.

[Plan for Pardot Drip Program Retirement](#)

Pardot's legacy Drip Program feature is scheduled for retirement with the Summer '22 release. If you currently use Drip Programs, convert them to Engagement Studio programs.

[Add Rows and Columns in Email Content Builder Email Templates](#)

Use the Layout component to easily add a row to your Email Content Builder email templates. This component replaces the Row component.

[Spread Out in Email Content Builder Email Templates with Column Padding](#)

Give columns some definition with padding between each column. Previously, users adjusted the padding for individual columns, and now they can evenly pad space between all columns.

[Indent Text in Rich Text Components in Email Content Builder Email Templates](#)

Indented text emphasizes that text and makes it easier for email recipients to notice it.

[Navigate More Easily in Email Content Builder Email Templates with Breadcrumbs](#)

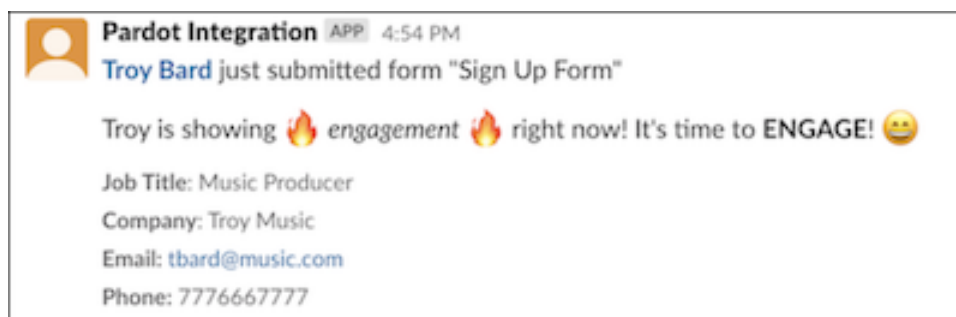
As users move among components, breadcrumbs help guide them back to where they started.

Send Slack Notifications to Pardot Users with Completion Actions (Beta)

Speed up your pipeline with a completion action that notifies your team in Slack when prospects interact with your marketing assets. Automatically send promising new leads to your Sales team, and share important prospect activity data with your Marketing team.

Where: 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](#).

How: First, opt in to the beta in Pardot settings and ask your Slack workspace admin to configure a Slack app to connect to Pardot. Then, set up the Slack connector in Pardot by adding your Slack workspace and selecting channels. After the connector is set up, sending a Slack notification appears as an option for completion actions on Pardot assets.



SEE ALSO:

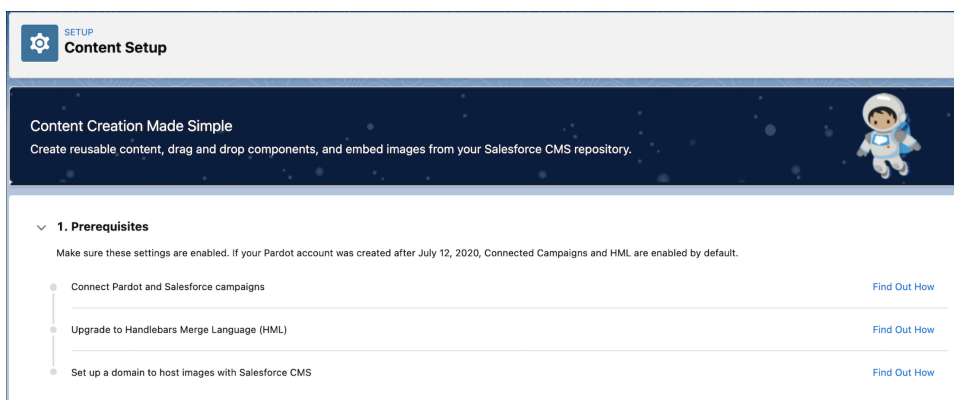
[Salesforce Help: Salesforce Pardot for Slack \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Build Landing Pages Faster with Drag-And-Drop Editor

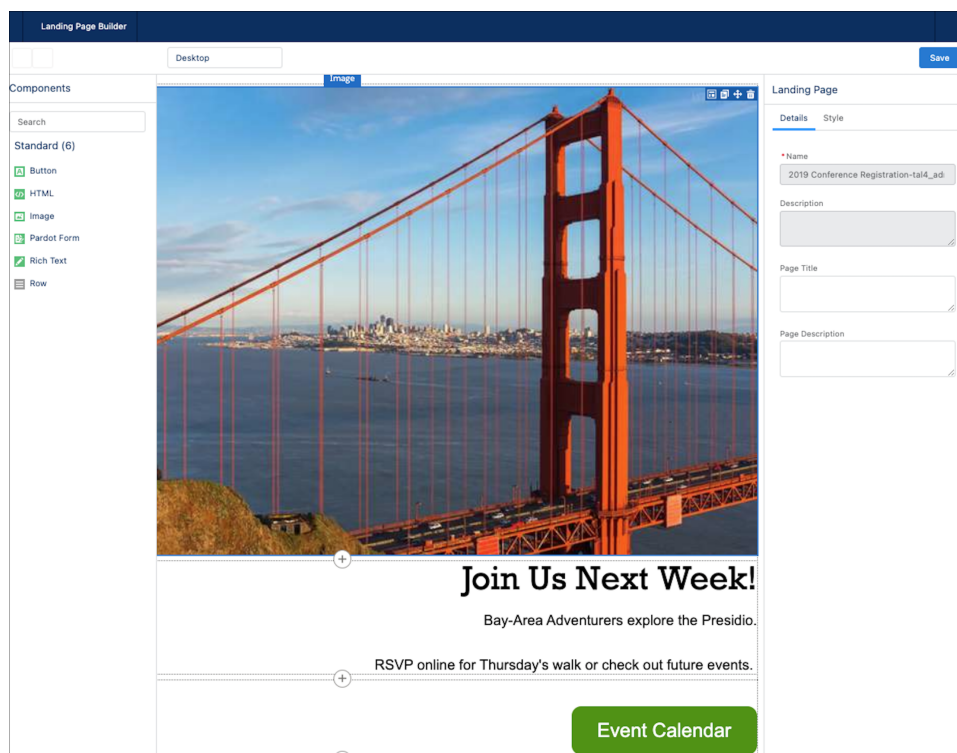
If you're using the Pardot Lightning App, you can now build landing pages inside the Lightning Experience. After you enable the feature, users can create a landing page record in a couple of clicks. Plus, stay on brand by encouraging users to start from saved templates and to select approved images from your Salesforce CMS repository.

Where: This change applies to all Pardot editions.

How: The landing page builder becomes available when you enable the new Pardot content experience and Salesforce CMS integration. If you're already using the drag-and-drop email editor in Pardot Lightning App, you can start using the new landing page builder right away. If you're using the Pardot Classic builders, just head over to Marketing Setup and follow the steps under Content Setup.



After setup, users can create landing page records, design landing pages, and publish them right from the Pardot Lightning App. Salesforce Files aren't supported in the builder, so we encourage you to follow the setup steps to integrate with Salesforce CMS.



The Landing Page Source field helps you distinguish landing pages that are built in the new experience or in Pardot Classic. Builder landing pages are labeled Salesforce, and Classic pages are labeled Pardot.

Landing Pages					
Recent LPs					
100+ Items • Sorted by Source • Filtered by All landing pages • Updated 22 minutes ago					
<input type="checkbox"/>	Landing Page Name	Source	Campaign Name	Content Last Saved	Content Last Saved By
39	LP - Fall - EMEA	Pardot	Quarterly Training		
40	LP - Winter - AMER	Pardot	Quarterly Training		
41	LP - Winter - APAC	Salesforce	Quarterly Training	7/19/2021, 3:33 PM	mmarisol@company.co
42	LP - Winter - EMEA	Salesforce	Quarterly Training	7/20/2021, 1:24 PM	mmarisol@company.co

SEE ALSO:

[Salesforce Help: Landing Page Experience in Lightning \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Email in Pardot \(can be outdated or unavailable during release preview\)](#)

Take Your Automations Further with Pardot Extensibility Enhancements

Now you can improve your Pardot automations with valuable external prospect data from your third-party apps. For each third-party app you use to collect prospect data, set up a Marketing App Extension. Then, add each activity type you want to capture. For example, capture when a prospect attends a webinar through your third-party webinar service and use that data in any of your Pardot automations or Engagement Studio programs. You can also view external activity data on individual prospect records.

Where: This change applies to Pardot Plus, Advanced, and Premium editions in Lightning Experience.

Who: Salesforce or designated marketing admins. The first admin to access this feature in Marketing Setup must have the Manage Public List Views user permission. Subsequent users don't need the permission to work with the feature.

Why: External activities let you take advantage of all the valuable prospect data you're collecting in third-party apps. Setup for your Marketing App Extensions is flexible, so you can tailor it to capture the data that gets you the most out of your Pardot automations.

How: From Marketing Setup, create a Marketing App Extension, assign it to a business unit, and create at least one activity type for the extension. Then, send the sample API endpoint for the activity type to your developer to help you connect your third-party app.

SEE ALSO:

[Salesforce Help: Capture External Prospect Activity in Pardot \(can be outdated or unavailable during release preview\)](#)

[Setting Up & Using External Activity via the API](#)

[IdeaExchange: Export/import function for Activities in Pardot \(partially delivered\)](#)

[IdeaExchange: Connector with GoToMeeting \(partially delivered\)](#)

[IdeaExchange: Run automation rules on EventBrite actions \(partially delivered\)](#)

[IdeaExchange: Allow Custom Prospect Activities \(partially delivered\)](#)

[IdeaExchange: Pardot to Wistia: Filter Specific Video Conversions in Lists & Automation \(partially delivered\)](#)

[IdeaExchange: Allow automation rule for Olark engaged chat prospects \(partially delivered\)](#)

[IdeaExchange: Wistia automation \(partially delivered\)](#)

[IdeaExchange: Integration between Olark Offline Message Feature and Pardot \(partially delivered\)](#)

[IdeaExchange: Add Connector for Vimeo \(partially delivered\)](#)

[IdeaExchange: Skype for Business and Pardot integration \(partially delivered\)](#)

[IdeaExchange: Associate Visitor Data with Eventbrite Registrations \(partially delivered\)](#)

[IdeaExchange: Allow 'rejected' registration status for automation rules \(partially delivered\)](#)

[IdeaExchange: Set up Zoom integration for webinars \(partially delivered\)](#)

[IdeaExchange: Pardot: Allow API to Write to Prospect Activity Records for Custom Video Player \(partially delivered\)](#)

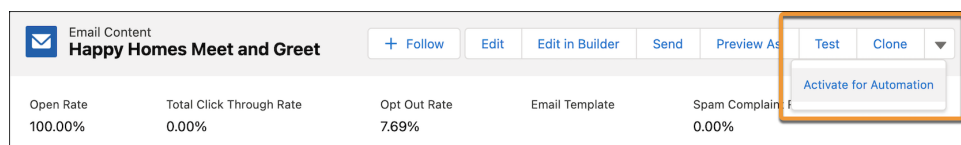
Push Emails from Lightning Experience into Engagement Programs

When you create emails in the drag-and-drop editor in Lightning Experience, you can now save them for use in Engagement Studio. Create your email content and activate it for use in automations.

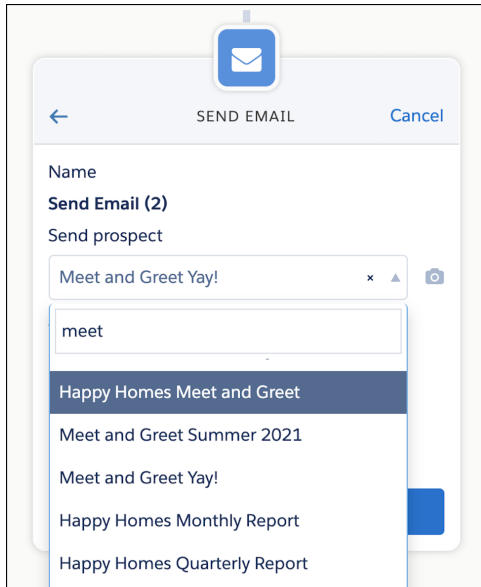
Where: This change applies to all Pardot editions.

Who: Users with the Activate Email for Automation system permission.

How: Enable the email experience on the Content Setup page in Marketing Setup. The next time a user with the appropriate permission creates or opens an email content record, Activate for Automation appears in the action menu.



When a user clicks the button, they can enter the campaign, sender, and reply-to settings to use for each Engagement Studio email send. The next time they create an engagement program, the email name appears in the available dropdowns.



An email must be activated each time changes are made to the record, content, or sending options.

SEE ALSO:

[Salesforce Help: Activate an Email for Use in Engagement Studio \(can be outdated or unavailable during release preview\)](#)

Create Custom Components for the Email Content Builder

You can now create custom email components to use in Pardot's drag-and-drop builder. Custom components help marketers and managers create more engaging email content for their customers.

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

Who: Users with the Access Drag and Drop Content Builder and View Setup and Configuration permissions can add custom components to an email template in Email Content Builder.

How: To configure a custom component to use in the Pardot email experience, define the metadata in `<component>.js-meta.xml`. Define a `lightning__StaticEmail` target and set `<isExposed>` to `true`.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>53.0</apiVersion>
  <isExposed>true</isExposed>
  <targets>
    <target>lightning__AppPage</target>
    <target>lightningStatic__Email</target>
    <target>lightning__HomePage</target>
  </targets>
</LightningComponentBundle>
```

Prepare the metadata package and deploy it to a test org.

SEE ALSO:

[Lightning Web Components Developer Guide: Email Builder](#) (can be outdated or unavailable during release preview)

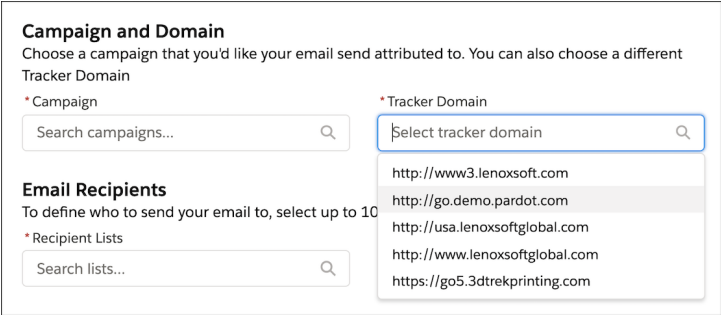
[Salesforce Help: Using Custom Components in Pardot Email](#) (can be outdated or unavailable during release preview)

Specify Tracker Domains for List Email Sends

Now you get tracker domain support for the emails that you build in the interactive Pardot email experience. When you send an email content record, you can indicate which domain to use with the send so that links are rewritten with your preferred domain.

Where: This change applies to all Pardot editions.

How: Valid tracker domains appear in the Tracker Domain lookup field.



Campaign and Domain
Choose a campaign that you'd like your email send attributed to. You can also choose a different Tracker Domain

* Campaign
Search campaigns...

* Tracker Domain
Select tracker domain

Email Recipients
To define who to send your email to, select up to 10

* Recipient Lists
Search lists...

http://www3.lenoxsoft.com
http://go.demo.pardot.com
http://usa.lenoxsoftglobal.com
http://www.lenoxsoftglobal.com
https://go5.3dtrekprinting.com

SEE ALSO:

[Salesforce Help: Add a Tracker Domain](#) (can be outdated or unavailable during release preview)

Enjoy Improved Prospect Mailability Insights (Generally Available)

This feature, now generally available, includes some improvements since the last release. All prospect records include a mailability section so marketers can see what type of emails a prospect can receive and what their bounce status is. Prospect mailability and opt-in status is easily updated via automation rules, prospect imports, and Engagement Studio programs. Plus, the Do Not Email field and the Opt Out field on prospects records are no longer connected, so they can't override each other.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

Mailability	
Status	✔ Mailable
Email Uniqueness	Email address is shared with multiple prospects.
Opted Out ⓘ	False
Do Not Email ⓘ	False
Soft Bounce Detected	No
Hard Bounce Detected	No

SEE ALSO:

[Salesforce Help: Manage Prospect Mailability \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Suggested Prospect Mailability Updates \(can be outdated or unavailable during release preview\)](#)

Reset Bounce Counts on Prospect Records

Users with the Pardot Administrator or Marketing user roles can now reset the count for hard or soft bounces on prospect records when bounce issues are resolved. When bounce counts are reset, the prospect becomes eligible to receive emails. If the next email sent to that address returns either a hard or soft bounce, the prospect is marked Undeliverable again.

Where: This change applies to all Pardot editions.

How: Open a prospect record and click the link to reset either hard or soft bounces.

SEE ALSO:

[Salesforce Help: Reset Bounces on a Prospect Record \(can be outdated or unavailable during release preview\)](#)

Customize Prospect Unsubscribe and Resubscribe Page Content

Your marketing team can now control all the messaging that appears on Pardot unsubscribe and resubscribe pages. Customizable fields now include the unsubscribe prompt, plus button text and confirmation messages for the unsubscribe and resubscribe pages.

Where: This change applies to all Pardot editions.

SEE ALSO:

[Salesforce Help: Manage Email Unsubscribe Settings \(can be outdated or unavailable during release preview\)](#)

See When and How Segmentation Prospect Lists Were Updated

To give marketing users more insight on their prospect lists, the segmentation list view in Pardot now includes two new columns: Updated At and Updated By. These columns show the date and time the list was last updated, and which user made the update. Marketers can filter the list view based on column data.

Where: This change applies to all Pardot editions.

When: This feature is available in Pardot Business Units on August 16, 2021.

Unarchived Dynamic Lists Retain Prospects

When you unarchive a dynamic list, the list retains the prospects that were on it when it was archived. Then the list rules are rerun to look for matching prospects. The prospect count can change after the rules are rerun, so we recommend that you wait to receive a confirmation email that the list is restored before you send to it.

Where: This change applies to all Pardot editions.

SEE ALSO:

[Salesforce Help: Considerations for Using Dynamic Lists \(can be outdated or unavailable during release preview\)](#)

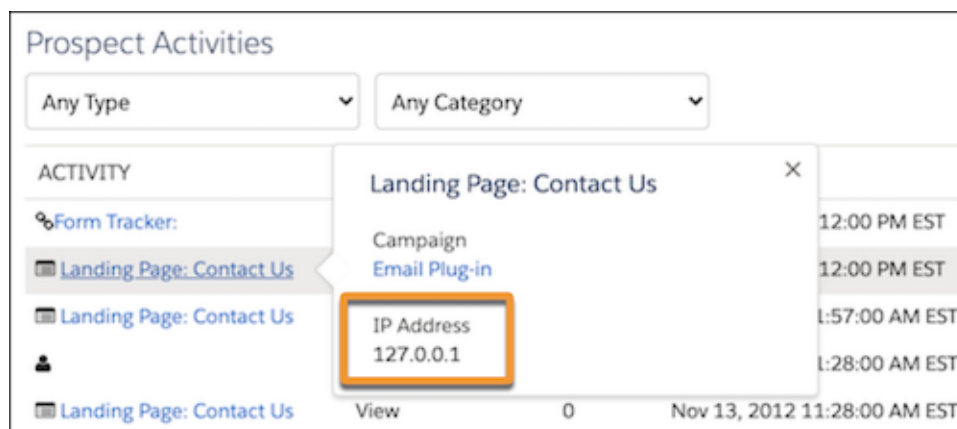
[Salesforce Help: Dynamic Lists for Pardot Enterprise Accounts \(can be outdated or unavailable during release preview\)](#)

View IP Address for Prospect Activities in Pardot

To better understand your engagement data, you can view the IP address associated with most prospect activities on prospect records in Pardot. You can use this additional insight to create more effective visitor activity filters. For example, if you notice a lot of test clicks coming from a single IP, you can filter out that activity based on the IP.

Where: This change applies to all Pardot editions.

How: From a prospect record in Pardot, click the Activities tab and view the IP Address column. You can also hover over a specific activity on the Overview tab to view more details, including the IP address associated with it.



SEE ALSO:

[Salesforce Help: Filtering Visitors \(can be outdated or unavailable during release preview\)](#)

New and Updated Pardot User Permissions

As part of Pardot's mailability improvements, new user permissions are available: Update Do Not Email field, Reset hard bounce count, and Reset soft bounce count. The user permission Toggle Opt In Status is now Update Opted Out field. Any users that previously had the Toggle Opt In Status permission now have the Update Opted Out field permission.

Where: This change applies to all Pardot editions.

Who: By default, the Pardot Administrator and Marketing user roles include Update Do Not Email field, Reset hard bounce count, and Reset soft bounce count. The Update Opted Out field user permission is included for Pardot Administrators and is available when you create a custom user role. Sales users have the Update Do Not Email field permission for prospects assigned to them only.

SEE ALSO:

[Salesforce Help: Pardot User Roles \(can be outdated or unavailable during release preview\)](#)

Plan for Pardot Drip Program Retirement

Pardot's legacy Drip Program feature is scheduled for retirement with the Summer '22 release. If you currently use Drip Programs, convert them to Engagement Studio programs.

Where: This change applies to all Pardot editions.

When: For customers who don't use drip programs, the feature is being removed with the Winter '22 release. For remaining customers, Drip Programs are being retired with the Summer '22 release.

SEE ALSO:

[Knowledge Article: Pardot Drips Retirement \(can be outdated or unavailable during release preview\)](#)

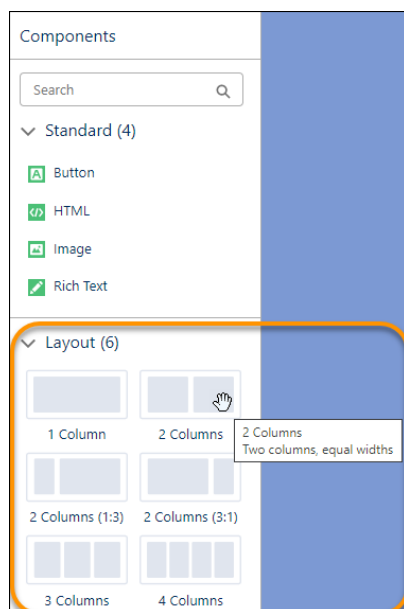
[Salesforce Help: Engagement Studio \(can be outdated or unavailable during release preview\)](#)

Add Rows and Columns in Email Content Builder Email Templates

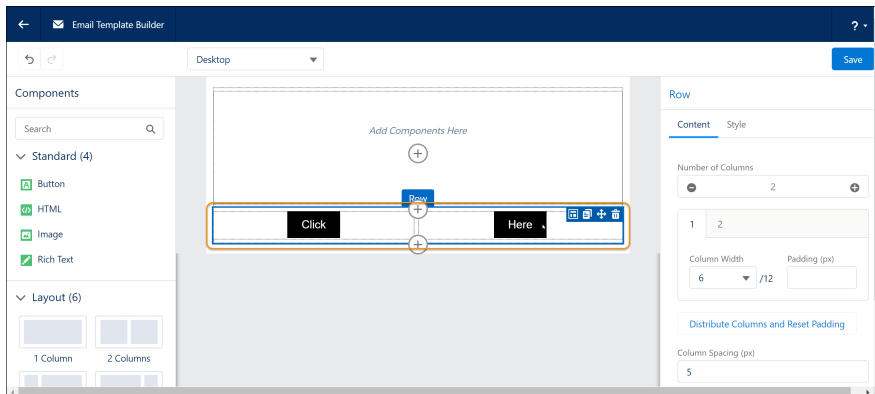
Use the Layout component to easily add a row to your Email Content Builder email templates. This component replaces the Row component.

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: In Email Content Builder, select a column layout and drag it to the canvas. Then add components to the columns.



The columns then appear on the canvas.



 **Note:** This change also appears in templates created in Email Template Builder.

SEE ALSO:

[Add Rows and Columns in Email Template Builder](#)

[Salesforce Help: Email for Pardot \(can be outdated or unavailable during release preview\)](#)

Spread Out in Email Content Builder Email Templates with Column Padding

Give columns some definition with padding between each column. Previously, users adjusted the padding for individual columns, and now they can evenly pad space between all columns.

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: To adjust the spacing between every column at the same time, change the Column Spacing (px) value.

Row

Content Style

Number of Columns

2

1 2

Column Width Padding (px)

6 /12

Distribute Columns and Reset Padding

Column Spacing (px)

5

Row

Content Style

Number of Columns

2

1 2


Column Width Padding (px)

6 /12

Distribute Columns and Reset Padding

Column Spacing (px)

5

 **Note:** This change also appears in templates created in Email Template Builder.

SEE ALSO:

[Get Some Breathing Room with Column Padding in Email Template Builder](#)

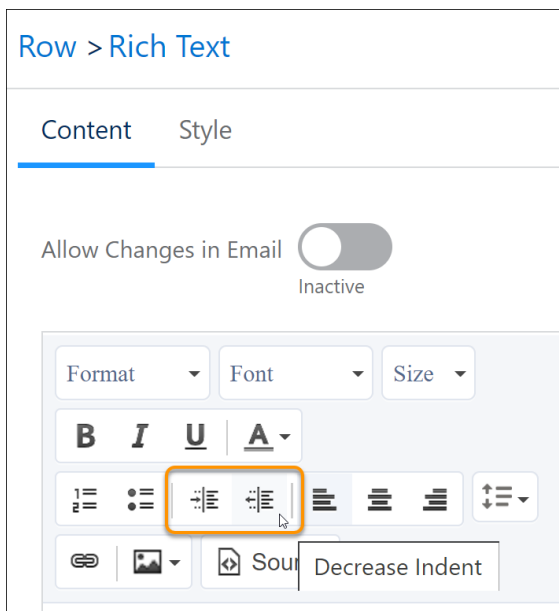
[Salesforce Help: Email for Pardot \(can be outdated or unavailable during release preview\)](#)

Indent Text in Rich Text Components in Email Content Builder Email Templates

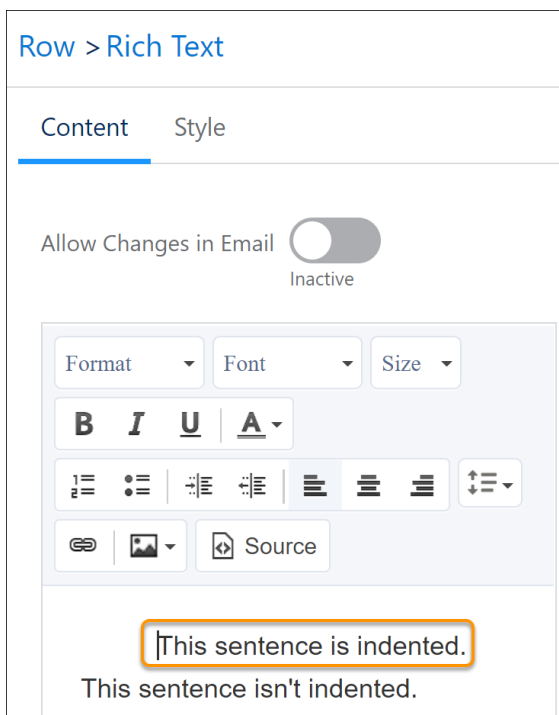
Indented text emphasizes that text and makes it easier for email recipients to notice it.


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: To adjust your text, in the Rich Text component, click the **Increase Indent** and **Decrease Indent** buttons.



The changes appear in your text.



 **Note:** This change also appears in templates created in Email Template Builder.

SEE ALSO:

[Get Some Breathing Room with Column Padding in Email Template Builder](#)

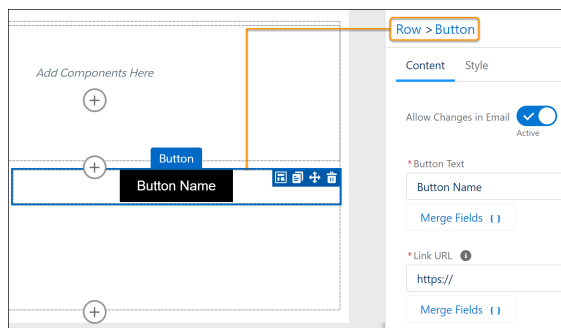
[Salesforce Help: Email for Pardot \(can be outdated or unavailable during release preview\)](#)

Navigate More Easily in Email Content Builder Email Templates with Breadcrumbs

As users move among components, breadcrumbs help guide them back to where they started.

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: In this example, breadcrumbs show users whether they selected the row or the button component.



 **Note:** This change also appears in templates created in Email Template Builder.

SEE ALSO:

[Navigate More Easily with Breadcrumbs in Email Template Builder](#)

[Salesforce Help: Email for Pardot \(can be outdated or unavailable during release preview\)](#)

Data and Content

Set up Einstein Discovery for your B2B Marketing Analytics Plus apps in fewer clicks and get updated fields in apps that use Object Sync for Pardot.

IN THIS SECTION:

[Explore Einstein Key Accounts on List Views \(Generally Available\)](#)

Einstein Key Account Identification is now generally available. This handy tool helps you prioritize your account-based marketing tactics by assigning a tier ranking and providing insights, which show characteristics that an account has in common with other successful accounts. The Einstein tier and insights appear on its record, and you can add the tier field to list views for ranking data at a glance.

Prepare Einstein Discovery in Fewer Clicks

Setup is now consolidated for the B2B Marketing Analytics Plus apps, Marketing Campaign Intelligence and Account-Based Marketing. You can create an app and its associated Einstein Discovery story at the same time with fewer tasks and clicks. And your users can reconfigure these apps from the dashboard.

Some B2B Marketing Analytics Datasets Were Fixed

Datasets used in B2B Marketing Analytics and Object Sync for Pardot were changed. Unique ID fields were removed, and missing labels were added in the Forms and Form Handlers dataset, the Landing Pages dataset, and Tags dataset. In the Prospect and Activity dataset, we added user fields, removed some duplicate fields and added missing labels.

CSS Class Name Was Changed

As part of Salesforce's commitment to inclusive language, we updated the name of a CSS class associated with Pardot forms. To set styles on dependent form fields, use the new class name `dependentField`.

Filter Pardot Automations with Einstein Account Tier Field

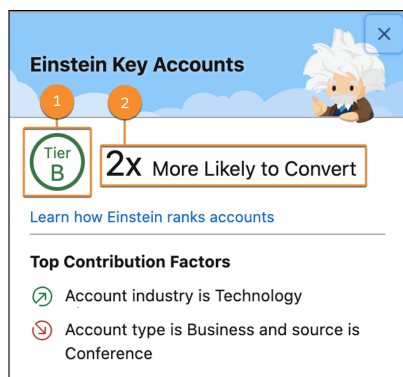
Leverage the power of Einstein AI in automation and segmentation rules, dynamic lists, and Engagement Studio. After the Einstein Key Accounts Identification model starts assigning account tiers, you can segment and automate on that tier value in Pardot.

Explore Einstein Key Accounts on List Views (Generally Available)

Einstein Key Account Identification is now generally available. This handy tool helps you prioritize your account-based marketing tactics by assigning a tier ranking and providing insights, which show characteristics that an account has in common with other successful accounts. The Einstein tier and insights appear on its record, and you can add the tier field to list views for ranking data at a glance.

Where: This change is available in Salesforce Enterprise, Performance, and Unlimited editions with Pardot Advanced or Premium edition.

Why: The Einstein account model considers your account record fields, opportunity creation data, and Pardot engagement data to identify key factors that most influence a successful outcome.



Rankings are predicted by the model and assigned a tier (1), such as A, B, C, or D, where A is the most likely to convert within 6 months. An uplift value (2) is calculated by comparing the conversion likelihood between an account from the given tier and a randomly selected one.

The training period for the Einstein model is up to 72 hours, and during that time no insights appear. When an insight is available for a given account, the data appears automatically.

How: Turn on the feature in Marketing Setup. The Einstein Key Accounts component is added to account records by default. You can add the Einstein Account Tier field on a public list view, or users can add it to their preferred views. Users can also add the tier field to custom reports.

SEE ALSO:

[Salesforce Help: Einstein Key Accounts Identification \(can be outdated or unavailable during release preview\)](#)
[Einstein Release Notes](#)

Prepare Einstein Discovery in Fewer Clicks

Setup is now consolidated for the B2B Marketing Analytics Plus apps, Marketing Campaign Intelligence and Account-Based Marketing. You can create an app and its associated Einstein Discovery story at the same time with fewer tasks and clicks. And your users can reconfigure these apps from the dashboard.

Where: This change is available in Salesforce Enterprise, Unlimited, and Developer editions with Pardot Premium Edition or the B2B Marketing Analytics Plus add-on.

How: Users create their own B2B Marketing Analytics Plus apps. Open Tableau CRM, click **Create**, and follow the prompts to create a Marketing Campaign Intelligence or Account-Based Marketing app. When the process is under way, they can move on to something else. We send an email when the job is done.

New app and story creation now is simpler for the user. But it can take a long time to run two jobs together. If an app attempts to process tens of millions of data rows, the creation process can time out. If it does, extend the timeframe allowed for analytics processes in Salesforce Setup.

SEE ALSO:

[Salesforce Help: Considerations for B2B Marketing Analytics Plus \(can be outdated or unavailable during release preview\)](#)
[Salesforce Help: Create a Marketing Campaign Intelligence App \(can be outdated or unavailable during release preview\)](#)
[Salesforce Help: Set Up the Account-Based Marketing App \(can be outdated or unavailable during release preview\)](#)

Some B2B Marketing Analytics Datasets Were Fixed

Datasets used in B2B Marketing Analytics and Object Sync for Pardot were changed. Unique ID fields were removed, and missing labels were added in the Forms and Form Handlers dataset, the Landing Pages dataset, and Tags dataset. In the Prospect and Activity dataset, we added user fields, removed some duplicate fields and added missing labels.

Where: This change applies to Pardot Plus, Advanced, and Premium editions with Salesforce Enterprise, Unlimited, or Developer edition. It also applies in Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.

Changes to the marketing asset datasets are available for B2B Marketing Analytics and Object Sync for Pardot. The Prospect and Activity dataset was updated for Object Sync for Pardot only.

How: Users must reconfigure their affected apps to receive the dataset changes.

SEE ALSO:

[Salesforce Help: B2B Marketing Analytics Datasets \(can be outdated or unavailable during release preview\)](#)
[Salesforce Help: Prospect and Activity Dataset for Object Sync \(can be outdated or unavailable during release preview\)](#)

CSS Class Name Was Changed

As part of Salesforce's commitment to inclusive language, we updated the name of a CSS class associated with Pardot forms. To set styles on dependent form fields, use the new class name `dependentField`.

Where: This change applies to all Pardot editions.

How: Although the legacy name still works for now, we recommend that you update the class name to ensure consistent styling on dependent form fields.

SEE ALSO:

[Salesforce Help: Form CSS Classes and Examples \(can be outdated or unavailable during release preview\)](#)

Filter Pardot Automations with Einstein Account Tier Field

Leverage the power of Einstein AI in automation and segmentation rules, dynamic lists, and Engagement Studio. After the Einstein Key Accounts Identification model starts assigning account tiers, you can segment and automate on that tier value in Pardot.

Where: This change is available in Salesforce Enterprise, Performance, and Unlimited editions with Pardot Advanced or Premium edition.

How: A Pardot administrator must map the Account Tier field to a custom Pardot field in Pardot Settings. Then the field appears in rule criteria under the Prospect account field object.

To create a rule, select **Prospect account field** in the first dropdown. Select **Account Tier** in the next dropdown, and then enter a value of A, B, C, or D.

SEE ALSO:

[Salesforce Help: Create an Account Tier Field in Pardot \(can be outdated or unavailable during release preview\)](#)

Manage and Extend Pardot

Now you can bring your own encryption keys, and do more with the Pardot API.

IN THIS SECTION:

[Set Up and Configure Pardot More Easily](#)

The new guided Pardot setup experience gets Pardot up and running in record time. You can focus on completing the basic tasks or taking a deep dive into more advanced Pardot configuration. Get all the context and resources that you need to confidently set up Pardot and start automating your marketing.

[Pardot API: New and Changed Items](#)

Pardot API v5 has new endpoints, more enablement resources, and the developer docs have a new home.

[Bring Your Own Encryption Keys to Pardot](#)

Bring and manage your own encryption keys to protect your Pardot data. Use Bring Your Own Key for Encryption at Rest to add a layer of security to your Pardot account, and to quickly destroy your data in a compliance emergency.

[Changes to Paused Connector Sync Behavior](#)

Clicking Sync with CRM on a prospect record or assigning a prospect to a user no longer causes a sync while the Salesforce-Pardot v2 connector is paused.

[Pardot Classic App Is Being Retired](#)

The Pardot Classic app will no longer be available for new accounts on October 11, 2021, and it's scheduled for retirement in all Salesforce orgs by October 17, 2022. Only the Pardot Classic app in Salesforce Classic and Lightning Experience is being retired. The standalone Pardot app at pi.pardot.com isn't affected, and remains available to all Pardot accounts.

Set Up and Configure Pardot More Easily

The new guided Pardot setup experience gets Pardot up and running in record time. You can focus on completing the basic tasks or taking a deep dive into more advanced Pardot configuration. Get all the context and resources that you need to confidently set up Pardot and start automating your marketing.

Where: This change applies to Lightning Experience with all editions of Pardot.

How: Access the new setup assistant from **Marketing Setup** in Salesforce.

Pardot API: New and Changed Items

Pardot API v5 has new endpoints, more enablement resources, and the developer docs have a new home.

Developer Doc and Resources

New Developer Doc Portal

The Pardot Developer Docs moved to <https://developer.salesforce.com/docs/marketing/pardot/overview>.

New Trailhead Modules

Two new Trailhead modules can help you learn even more about the Pardot API.

- [Pardot API Quicklook](#)
- [Salesforce OAuth for the Pardot API](#)

New Video

A new video walks you through setting up [Salesforce OAuth for the Pardot API](#).

Version 5 Changes

Added Support for Pagination

New support for pagination lets you retrieve the next page of data by calling `nextPageURL` directly or constructing a call using `nextPageToken`.

New Endpoint for External Activity

Allows developers to set up and automate submitting external activity to Pardot.

New and Changed For v3 & v4 Object Coverage Parity

Added `customField` (CRUDQ).

Added `list` (CRUDQ).

Added `prospect`(RQ).

Added `visit` (RQ).

Added `visitor-page-views` (RQ).

Added additional fields and relationships for `campaign`.

Added additional fields and relationships for `user`.

Bring Your Own Encryption Keys to Pardot

Bring and manage your own encryption keys to protect your Pardot data. Use Bring Your Own Key for Encryption at Rest to add a layer of security to your Pardot account, and to quickly destroy your data in a compliance emergency.

Where: This change is available for an additional cost in Pardot Premium editions.

How: Add and manage keys from your Pardot Security settings page.

SEE ALSO:

[Salesforce Help: Bring and Manage Your Own Encryption Keys \(can be outdated or unavailable during release preview\)](#)

Changes to Paused Connector Sync Behavior

Clicking Sync with CRM on a prospect record or assigning a prospect to a user no longer causes a sync while the Salesforce-Pardot v2 connector is paused.

Where: This change applies to all Pardot editions.

SEE ALSO:

[Salesforce Help: Pause the Salesforce-Pardot Connector v2 \(can be outdated or unavailable during release preview\)](#)

Pardot Classic App Is Being Retired

The Pardot Classic app will no longer be available for new accounts on October 11, 2021, and it's scheduled for retirement in all Salesforce orgs by October 17, 2022. Only the Pardot Classic app in Salesforce Classic and Lightning Experience is being retired. The standalone Pardot app at pi.pardot.com isn't affected, and remains available to all Pardot accounts.

Where: This change applies to all Pardot accounts.

How: When the Pardot Classic app is retired, you can navigate to pi.pardot.com and log in using Salesforce credentials, or you can enable the Pardot Lightning app in Salesforce.

SEE ALSO:

[Knowledge Article: Pardot Classic App Retirement Customer FAQ \(can be outdated or unavailable during release preview\)](#)

Revenue

In Salesforce CPQ, a release update adds permissions to standard permission sets and updates Access permission sets. Salesforce Billing prevents duplicate payments by locking invoices until confirming a valid response from the payment gateway. Credit note lines now inherit the Tax Percentage field, revenue finance books support more finance periods, and a Customer Asset Lifecycle Management field was relabeled.

IN THIS SECTION:

[Salesforce CPQ](#)

Permissions were added to standard permission sets, and Access permission sets were updated.

[Salesforce Billing](#)

Salesforce Billing prevents duplicate payments by locking invoices until confirming a valid response from the payment gateway. Use more finance periods in your revenue finance books. When you cancel and rebill an invoice, credit note lines now inherit the Tax Percentage field from their parent invoice lines. A Customer Asset Lifecycle Management label on the Order object was changed.

SEE ALSO:

[Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '22 \(can be outdated or unavailable during release preview\)](#)

Salesforce CPQ

Permissions were added to standard permission sets, and Access permission sets were updated.



Note: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

[Assign New Access Permission Sets and Review New Permissions \(Release Update\)](#)

Ensure that users have secure and appropriate levels of access to objects and fields. Assign the new Salesforce CPQ Admin User Access and Salesforce CPQ Partner User Access permission sets to your Salesforce CPQ admins and partner users. Review the new permissions added to the Salesforce CPQ Customer User Access permission set. Then use a CPQ package setting to test the permission sets before they're enforced in Spring '22.

[New Permissions for Creating Contracts and Service Contracts](#)

To create contracts or service contracts from an opportunity or order, users now require Create access on assets in addition to the existing Read and Edit asset requirements.

SEE ALSO:

[Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '22 \(can be outdated or unavailable during release preview\)](#)

Assign New Access Permission Sets and Review New Permissions (Release Update)

Ensure that users have secure and appropriate levels of access to objects and fields. Assign the new Salesforce CPQ Admin User Access and Salesforce CPQ Partner User Access permission sets to your Salesforce CPQ admins and partner users. Review the new permissions added to the Salesforce CPQ Customer User Access permission set. Then use a CPQ package setting to test the permission sets before they're enforced in Spring '22.

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

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: A series of four Access permission sets and requirements contain data security–related permissions. In Summer '21, we added the permission sets User Access and Customer User Access. In Winter '22, we added permission requirements to the Customer User Access set, and we added two more sets, Partner User Access and Admin User Access. We also introduced the same data-security permissions to standard CPQ permission sets.

As permission requirements are added in future releases, two methods help ensure that your users never risk missing important data security updates.

- If you cloned or created custom permission sets for admins, users, partners, or customers, assign the appropriate Access set. We designed Access sets for assignment directly to your users, without cloning or editing.
- If you don't clone or use custom permission sets, you can use the standard sets alone, without assigning Access sets,

For example, let's say you assign a customized admin permission set to admins and the standard Customer User set to customers. In this case, assign the Admin User Access permission set to your admins. Your customers can continue using the Customer User set without changes.

For a complete list of new permissions in each Access permission set, review [New and Changed Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '22](#).

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**.

Data restrictions for the Access permission sets are enforced in Salesforce CPQ Spring '22. Until 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 *Installed Packages*, 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 remove the Perform Enhanced Data Access Checks setting and enforce data restrictions for the Access permission sets.

SEE ALSO:

[Release Updates](#)

New Permissions for Creating Contracts and Service Contracts

To create contracts or service contracts from an opportunity or order, users now require Create access on assets in addition to the existing Read and Edit asset requirements.

Where: This change applies to Salesforce Lightning and Salesforce Classic in Salesforce CPQ and Service Cloud for Salesforce CPQ.

Salesforce Billing

Salesforce Billing prevents duplicate payments by locking invoices until confirming a valid response from the payment gateway. Use more finance periods in your revenue finance books. When you cancel and rebill an invoice, credit note lines now inherit the Tax Percentage field from their parent invoice lines. A Customer Asset Lifecycle Management label on the Order object was changed.



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.

IN THIS SECTION:

[Prevent Duplicate Payments](#)

Salesforce Billing now locks invoices from payments when a user makes a charge request to the payment gateway from the Payment Center or a force.com payment site. It also locks invoices after a payment run picks them up for evaluation. The invoice unlocks only when Salesforce Billing confirms that the gateway provided a valid response, or when the payment run finishes processing the invoice. Users don't risk making duplicate payments if the gateway response is indeterminate.

[Use More Finance Periods in Your Revenue Finance Books](#)

It's easier to track more finance periods in your revenue finance books. Revenue finance books now support up to 180 open monthly or 180 custom finance periods per book. Closed finance periods no longer count toward the 180-period limit.

[On Credit Note Lines, See the Tax Percentage After You Cancel and Rebill](#)

When you cancel and rebill an invoice, the resulting credit note lines now inherit the Tax Percentage field from their parent invoice lines. The credit note line's Line Tax Status field shows a value of Copied to indicate that the tax percentage and other tax values were inherited. Previously, after an invoice was canceled and rebilled, the credit note line didn't inherit the tax percentage, and the line tax status was null.

[New Permissions for Creating Contracts and Service Contracts](#)

To create contracts or service contracts from an opportunity or order, users now require Create access on assets in addition to the existing Read and Edit asset requirements.

[A Lifecycle Management Field on Orders Was Relabeled](#)

For clarity, a Customer Asset Lifecycle Management field was relabeled. The field Asset (CALM) on the Order object is now Lifecycle-Managed Asset.

[Launch Monthly Invoice Runs on the Last Day of the Month](#)

Use the invoice scheduler's new Run on End of Month field to launch invoice runs on the last day of a month, regardless of the month's length.

[Enable Encrypted Customer IDs for Payeezy ACH Payment Methods](#)

Manage your information securely in Salesforce Billing when configuring ACH payment methods for Payeezy. We've added the Payeezy package field Encrypted Customer ID to payment methods, which represents a unique customer value such as a social security number, tax ID, or driver's license number. The field is encrypted, so that entered values are masked in Salesforce Billing. We've also added the Use EncryptedCustomerId for Payeezy ACH Payment Methods field to the Payment tab of Salesforce Billing package settings. When active, Salesforce Billing includes the EncryptedCustomerId value in ACH payment method data included in payment requests sent to Payeezy payment gateways.

[New Requirements for Payeezy ACH Payment Methods](#)

Payeezy ACH payment methods now require values for the Identification Type and Identification Number fields.

SEE ALSO:

[Knowledge Article: New Objects, Fields, and Permissions in Salesforce CPQ and Billing Winter '22 \(can be outdated or unavailable during release preview\)](#)

Prevent Duplicate Payments

Salesforce Billing now locks invoices from payments when a user makes a charge request to the payment gateway from the Payment Center or a force.com payment site. It also locks invoices after a payment run picks them up for evaluation. The invoice unlocks only when Salesforce Billing confirms that the gateway provided a valid response, or when the payment run finishes processing the invoice. Users don't risk making duplicate payments if the gateway response is indeterminate.

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

How: Invoices now have the Invoice Locked checkbox. When a user attempts to pay an invoice in the Payment Center or a force.com payment site, Salesforce Billing evaluates the status of Invoice Locked before making the charge request to the payment gateway. If Invoice Locked is deselected, Salesforce Billing selects it. Otherwise, Salesforce Billing shows an error and doesn't continue with the charge request. While Invoice Locked is selected, users can't make payments against the invoice in the Payment Center or a force.com payment site.


If the gateway response causes an update to the value of your payment transaction's gateway status to one of the following values, Salesforce Billing deselects the Invoice Locked field: Success, Decline, Permanent Fail, Validation Error, or Requires Review. If the value of your transaction's Gateway Response field is Indeterminate or System Error, Invoice Locked remains selected.

If your invoice is still locked, you can view the indeterminate transaction in your payment gateway's merchant portal to determine if the payment actually went through. If it did, you can deselect Invoice Locked on the relevant invoice on your own.

When a payment run picks up an invoice for processing, Salesforce Billing also selects Invoice Locked. This way, Payment Center users can't pay invoices that the payment run is already evaluating. When the payment run finishes processing the invoice, Salesforce Billing deselects Invoice Locked regardless of the gateway's response. If the gateway's response was Indeterminate, Salesforce Billing updates the invoice's Corrective Action field to Required. Payment runs don't pick up locked invoices.

Users must have Read and Edit access on the Invoice Locked field in order to change it. These permissions are available in the Salesforce Billing Admin permission set. If your org uses custom permission sets, add Invoice Locked Read and Edit access for the following users:

- Users who create or post invoices or who need access to the Invoice Locked field.
- Users who process payments from the Payment Center, payment runs, and Guest Users for payment sites.

 **Important:** The payment transaction's Attempt Refund and Unlock Invoice button isn't related to the Invoice Locked field. It's used to change the invoice's Corrective Action field from Action Required to null after an unsuccessful or indeterminate payment run.

SEE ALSO:

[Salesforce Help: Locked and Unlocked Invoices \(can be outdated or unavailable during release preview\)](#)

Use More Finance Periods in Your Revenue Finance Books

It's easier to track more finance periods in your revenue finance books. Revenue finance books now support up to 180 open monthly or 180 custom finance periods per book. Closed finance periods no longer count toward the 180-period limit.

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

SEE ALSO:

[Salesforce Help: Batch Create Monthly Finance Periods \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Finance Periods for Custom Date Ranges \(can be outdated or unavailable during release preview\)](#)

On Credit Note Lines, See the Tax Percentage After You Cancel and Rebill

When you cancel and rebill an invoice, the resulting credit note lines now inherit the Tax Percentage field from their parent invoice lines. The credit note line's Line Tax Status field shows a value of Copied to indicate that the tax percentage and other tax values were inherited. Previously, after an invoice was canceled and rebilled, the credit note line didn't inherit the tax percentage, and the line tax status was null.

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

How: If you're upgrading from an earlier version of Salesforce Billing, add *Copied* as a global picklist value for the Line Tax Status field.

1. From Setup, in the Quick Find box, enter *Picklist Value Sets*, and then select **Picklist Value Sets**.
2. Select **Line Tax Status**.
3. In the Values section, click **New**.
4. Enter *Copied* and then select **Add the new picklist value to all Record Types that use this Global Value Set**.

New Permissions for Creating Contracts and Service Contracts

To create contracts or service contracts from an opportunity or order, users now require Create access on assets in addition to the existing Read and Edit asset requirements.

Where: This change applies to Salesforce Lightning and Salesforce Classic in Salesforce CPQ and Service Cloud for Salesforce CPQ.

A Lifecycle Management Field on Orders Was Relabeled

For clarity, a Customer Asset Lifecycle Management field was relabeled. The field Asset (CALM) on the Order object is now Lifecycle-Managed Asset.

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

Launch Monthly Invoice Runs on the Last Day of the Month

Use the invoice scheduler's new Run on End of Month field to launch invoice runs on the last day of a month, regardless of the month's length.

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

Why: Previously, you could configure monthly invoice runs only with the scheduler's Invoice Day of Month field. If the invoice day of month wasn't in a certain month, the scheduler didn't launch an invoice run. For example, if the invoice day of month was 31, the scheduler didn't launch a run in months with 30, 29, or 28 days.

How: Create an invoice scheduler and select Run on End of Month. Then, select a Start Date Time that's on the last day of the current month. As long as the invoice scheduler is active, future invoice runs launch on the last day of the month.

If you're upgrading from an earlier version of Salesforce Billing, you must add the Run on End of Month field to the invoice scheduler's page layout.

Enable Encrypted Customer IDs for Payeezy ACH Payment Methods

Manage your information securely in Salesforce Billing when configuring ACH payment methods for Payeezy. We've added the Payeezy package field Encrypted Customer ID to payment methods, which represents a unique customer value such as a social security number, tax ID, or driver's license number. The field is encrypted, so that entered values are masked in Salesforce Billing. We've also added the Use EncryptedCustomerId for Payeezy ACH Payment Methods field to the Payment tab of Salesforce Billing package settings. When active, Salesforce Billing includes the EncryptedCustomerId value in ACH payment method data included in payment requests sent to Payeezy payment gateways.

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

When: This update is available in Salesforce Billing Winter '22 Patch 12.

Who: This update is for Salesforce Billing users with the Payeezy for Salesforce Billing package.

Why: Previously, the Payeezy package used the payment method field Identification Id / Number field for customer IDs, which wasn't encrypted. However, the Payeezy payment gateway requires a customer ID for ACH payment method data in payment gateway requests. If customers who didn't want to use a non-encrypted field left Identification Id / Number empty, Salesforce Billing would send a default internal value with the gateway request. This internal value would cause a failure response from the payment gateway.

How: If you're installing Salesforce Billing for the first time, click **Execute scripts** in Salesforce Billing package settings to add the Use EncryptedCustomerId for Payeezy ACH Payment Methods setting. If you're upgrading from an earlier version of Salesforce Billing, add the Encrypted Customer ID field to the payment method page layout.

The Enable Encrypted Customer ID package setting is disabled by default. While it's disabled, Salesforce Billing sends the default internal value for Identification Id / Number with gateway requests.

To use the Encrypted Customer ID field, in the Payment tab of Salesforce Billing package settings, select **Use EncryptedCustomerId for Payeezy ACH Payment Methods**. Then, on your Payeezy ACH payment methods, delete the value of your Identification / Id Number field. Enter your customer ID value in the Encrypted Customer ID field and save your changes. When you make your gateway requests, Salesforce Billing ignores Identification Id / Number and uses the value of Encrypted Customer ID instead.

New Requirements for Payeezy ACH Payment Methods

Payeezy ACH payment methods now require values for the Identification Type and Identification Number fields.

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

When: This update is available in Salesforce Billing Winter '22 Patch 12.

Who: This update is for Salesforce Billing users with the Payeezy for Salesforce Billing package.

Sales

Pipeline Inspection lets you create custom filters, watch important opportunities, and see which deals are less likely to close in the current month. Show a Most Likely forecast category on the forecasts page. Assign territories quicker and put assignment rules on pause. Add Inbox users to any Einstein Activity Capture configuration. Salesforce Maps helps you automate assignments for large territories. Territory Planning gives you flexibility to design territories for in-person and virtual customer visits. High Velocity Sales lets you update active sales cadences and test different versions of email templates and call scripts on the same outreach step.

IN THIS SECTION:

[Pipeline Inspection](#)

Create pipeline views and saved filters, and track important opportunities. See Einstein Opportunity Scores in tiers with recent changes and insights, and get predictions of deals that are unlikely to close with Einstein Deal Insights. Know when next steps aren't updated, and see counts for close dates that are pushed out on opportunities.

[Core Sales Features](#)

Show an additional forecast category: Most Likely. Save time when running territory assignment rules. Protect your product data with new sharing methods. And an enforced release update deletes your original territory management sharing records to prevent issues with Enterprise Territory Management.

[Productivity Features](#)

Include Inbox users in any Einstein Activity Capture configuration. Easily add predefined columns to your email templates in email template builder. Enjoy new ways to filter and sort activities.

[Einstein Conversation Insights](#)

Einstein Conversation Insights can now match voice and video calls to related opportunities automatically. New filters allow users to see call data sorted by opportunity or lead details, and video calls show more call participant details.

[Salesforce Maps](#)

Automate as many as 5,000 territory assignments, plot any Salesforce data on the map, and help your reps find new business using filters for key demographics. Plan strategic territories using heat maps to visualize attributes that matter to your teams. Keep drivers focused on the road when you automate reporting of their locations, trip-related data, and availability to pick up work using the Salesforce mobile app for iOS.

[High Velocity Sales](#)

Edit active sales cadences, test different email templates or call scripts on the same step, get detailed insights about sales cadence, call script, email template, and sales rep performance, add, remove, or pause targets from reports, and manage sales cadence targets using invocable actions.

[Integration with Google](#)

Get improvements to event logging from Google calendar. For Salesforce Inbox users, manually log emails when in an Einstein Activity Capture configuration with emails turned off.

[Integration with Microsoft](#)

Get improvements to event logging from Outlook. For Salesforce Inbox users, manually log emails when in an Einstein Activity Capture configuration with emails turned off. If you're ready to migrate from Lightning Sync to Einstein Activity Capture, the migration assistant can help you do it quickly and easily. And if you're still on Salesforce for Outlook, remember that the full product retirement is scheduled for June 2023.

[Other Changes in the Sales Cloud](#)

Learn about other changes we've made to improve usability.

Pipeline Inspection

Create pipeline views and saved filters, and track important opportunities. See Einstein Opportunity Scores in tiers with recent changes and insights, and get predictions of deals that are unlikely to close with Einstein Deal Insights. Know when next steps aren't updated, and see counts for close dates that are pushed out on opportunities.

IN THIS SECTION:

[Save Time by Creating Custom Pipeline Views and Filters](#)

Sales managers and reps can save their most frequently used pipeline views to avoid recreating them each time they visit Pipeline Inspection. For example, create custom filters for new business, teams, time periods, product types, and more.

[Flag Important Deals to Track Progress Closely](#)

To monitor priority opportunities in Pipeline Inspection, sales managers and reps now can mark them as important. They can see a list view of all important opportunities or just the important opportunities for custom filters such as record types, forecast categories, and sales teams.

[See Which Deals Are Unlikely to Close This Month with Einstein Deal Insights](#)

Einstein Deal Insights predicts when opportunities scheduled to close this month are unlikely to be won during the same month. With this new insight, sales managers and their teams can forecast more accurately and maintain more accurate pipelines.

[Prioritize Deals More Effectively with Tiered Einstein Opportunity Scores](#)

In Pipeline Inspection, Einstein Opportunity Scores are grouped into tiers to give sales teams a new way to see which deals are on track or to spot deals that are at risk. High, medium, and low tiers, rather than numerical scores, help sales teams prioritize opportunities and decide which sets of opportunities to focus on.

[Hold Sales Reps Accountable for Updating Opportunity Next Steps](#)

To help keep sales reps focused on moving opportunities forward, sales managers can now see when opportunity next steps aren't updated. An indicator shows when the last update to the Next Step field was more than 7 days ago. Hovering on the Next Step field shows details on the last update.

[See How Many Times Close Dates Are Pushed Out](#)

With the Push Count field, your sales teams can get important information about deal health. The Push Count field shows the number of times an opportunity's close date is pushed out by a calendar month.

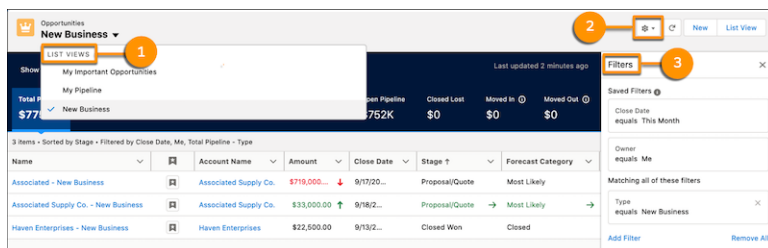
Save Time by Creating Custom Pipeline Views and Filters

Sales managers and reps can save their most frequently used pipeline views to avoid recreating them each time they visit Pipeline Inspection. For example, create custom filters for new business, teams, time periods, product types, and more.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set. To create and edit all types of list views, users must have the Create and Customize List Views permission. To create or edit public pipeline views, users must have the Modify Public List Views permission.

How: You create list views similarly to the way you create them in other objects.



To create pipeline views (1), use the List View Controls menu under the gear icon (2) to create, clone, or delete pipeline views. Add filters to view the opportunities that meet your filter criteria. Using the filter panel (3), you can add time period and user filters. And you can add even more criteria such as accounts, amounts, and record types.

SEE ALSO:

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

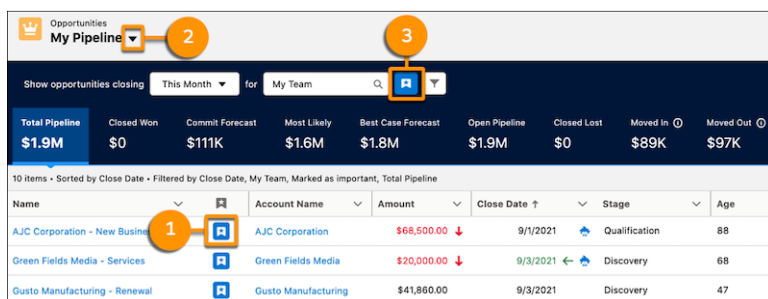
Flag Important Deals to Track Progress Closely

To monitor priority opportunities in Pipeline Inspection, sales managers and reps now can mark them as important. They can see a list view of all important opportunities or just the important opportunities for custom filters such as record types, forecast categories, and sales teams.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set.

How: Mark opportunities as important in the opportunities list in Pipeline Inspection only.



To mark opportunities as important, use the icon next to the opportunity name (1). A list view of all important opportunities is in the pipeline views dropdown (2). Users can also apply the important opportunities filter to any saved view to see just the important opportunities for it (3).

SEE ALSO:

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Managing Pipelines with Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

See Which Deals Are Unlikely to Close This Month with Einstein Deal Insights

Einstein Deal Insights predicts when opportunities scheduled to close this month are unlikely to be won during the same month. With this new insight, sales managers and their teams can forecast more accurately and maintain more accurate pipelines.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set.

Why: To get details about a prediction, hover over the opportunity close date field.

The screenshot shows the 'My Pipeline' view in Salesforce. At the top, there are summary metrics: Total Pipeline (\$4.7M), Closed Won (\$421K), Commit Forecast (\$948K), Most Likely (\$4.1M), Best Case Forecast (\$4.4M), Open Pipeline (\$4.3M), Closed Lost (\$192K), Moved In (\$363K), and Moved Out (\$423K). Below this is a table of 45 items, sorted by Next Step. The table columns are Name, Account Name, Amount, Close Date, Stage, Age, and Days in St... A tooltip is shown over the 'Close Date' field for the first row, 'A/C Corporation - New Business', which has a close date of 9/1/2021. The tooltip text reads: 'Unlikely to close this month. Einstein predicts this opportunity is unlikely to be won this month. This prediction is based on comparison to your previously closed deals. More Info'. The table also shows other opportunities like 'Towson Inc. - Renewal', 'XPower - Renewal', 'Aims Social, Inc. - New Business', 'Universal Containers - Renewal', and 'Amptech Corporation - New Business'.

Name	Account Name	Amount	Close Date	Stage	Age	Days in St...
A/C Corporation - New Business	A/C Corporation	\$68,500.00	9/1/2021	Qualification	88	22
Towson Inc. - Renewal	Towson			Closed Won	52	15
XPower - Renewal	XPower			Negotiation	109	35
Aims Social, Inc. - New Business	Aims Social			Negotiation	67	1
Universal Containers - Renewal	Universal Containers			Negotiation	78	17
Amptech Corporation - New Business	Amptech Corporation	\$7,000.00	9/3/2021	Proposal/Quote	101	52

How: In Pipeline Inspection settings, turn on Einstein Deal Insights and accept the Terms of Service.

SEE ALSO:

[Salesforce Help: Turn On Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Einstein Deal Insights \(can be outdated or unavailable during release preview\)](#)

[Einstein Release Notes](#)

Prioritize Deals More Effectively with Tiered Einstein Opportunity Scores

In Pipeline Inspection, Einstein Opportunity Scores are grouped into tiers to give sales teams a new way to see which deals are on track or to spot deals that are at risk. High, medium, and low tiers, rather than numerical scores, help sales teams prioritize opportunities and decide which sets of opportunities to focus on.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set.

How: Tiered opportunity scores are available only in Pipeline Inspection. To show the Opportunity Score field in Pipeline Inspection, you must enable Einstein Opportunity Scoring. To see the opportunity score, key factors, and score changes, hover over the field. The tiers and score ranges are: High (67-99), Medium (34-66), and Low (0-33).

The screenshot shows the 'My Pipeline' view in Salesforce. At the top, there's a summary bar with various pipeline metrics: Total Pipeline (\$4.8M), Closed Won (\$421K), Commit Forecast (\$948K), Most Likely (\$4.1M), Best Case Forecast (\$4.5M), Open Pipeline (\$4.3M), Closed Lost (\$192K), Moved In (\$383K), and Moved Out (\$423K). Below this is a table of 45 items, sorted by Close Date. An Einstein Scoring overlay is visible, showing a score of 85 and a note that the score changed from 85 on September 9. The overlay also lists 'Top Positives' (Past wins with this account, Moved quickly from previous opportunity stage, Opportunity Amount went up) and 'Top Negatives' (No top negatives are available for this opportunity).

Name	Opportun...	Amount	Close Date	Stage	Age	Days in St...
AJC Corporation - New Business	High			Qualification	88	22
Momentum Design - Add-On Business	High			Proposal/Quote	63	15
Upstyle Inc. - Add-On Business	High			Proposal/Quote	84	15
Allied Technologies - New Business	Med			Proposal/Quote	67	25
Green Fields Media - Services	High			Discovery	68	12
Amptech Corporation - New Business	Med			Proposal/Quote	101	52
Gusto Manufacturing - Renewal	Med			Discovery	47	22
Universal Containers - Renewal	High			Negotiation	78	17
Amptech Corporation - Renewal	High			Negotiation	49	18
Universal Containers - Renewal	Med	\$49,300.00	9/11/2021	Negotiation	63	13

SEE ALSO:

[Salesforce Help: Enable Einstein Opportunity Scoring](#)

[Salesforce Help: Understand How Einstein Scores Your Opportunities](#)

[Salesforce Help: Tiered Opportunity Scores](#)

Hold Sales Reps Accountable for Updating Opportunity Next Steps

To help keep sales reps focused on moving opportunities forward, sales managers can now see when opportunity next steps aren't updated. An indicator shows when the last update to the Next Step field was more than 7 days ago. Hovering on the Next Step field shows details on the last update.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

Who: To use Pipeline Inspection, users must have the Pipeline Inspection permission set.

How: To see the number of days since the last update, the user who made the update, and the date it was made, hover over the Next Step field.

The screenshot shows the 'New Business' view in Salesforce. The summary bar shows metrics: Total Pipeline (\$1.2M), Closed Won (\$87K), Commit Forecast (\$135K), Most Likely (\$987K), Best Case Forecast (\$1.1M), Open Pipeline (\$1.1M), Closed Lost (\$192K), Moved In (\$169K), and Moved Out (\$277K). Below is a table of 10 items. A warning overlay is visible over the 'Next Step' field of the 'Haven Enterprises - New Business' row, stating 'Next Step not updated' and 'Last updated 35 days ago' by Courtney Smith on 08/05/2021.

Name	Account Name	Amount	Close Date	Stage	Next Step	Forecast ...
AJC Corporation - New Business	AJC Corporation	\$68,500.00	9/1/2021	Qualification	Signed SOW	Pipeline
Allied Technologies - New Busin...	Allied Technologies	\$93,000.00	9/3/2021	Proposal/Qu...	Qualifying the prospect's ne...	Most Likely
Amptech Corporation - New Busi...	Amptech Corporation	\$7,000.00	9/3/2021			Most Likely
Haven Enterprises - New Business	Haven Enterprises	\$22,500.00	9/13/20...			Closed
Roseburg Products - New Busine...	Roseburg Products	\$64,000.00	9/13/20...			Closed

To get detailed data for the Next Steps field, Historical Trending must be enabled and the Next Step field must be configured for trending. If you enabled Pipeline Inspection in Summer '21, check your Historical Trending settings to ensure that the Next Step field is configured for trending.

If you enable Pipeline Inspection in Winter '22, we configure the Next Step field in Historical Trending as part of the Pipeline Inspection setup.

SEE ALSO:

[Salesforce Help: Set Up Historical Trend Reporting](#)

[Salesforce Help: Guidelines and Limits for Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

See How Many Times Close Dates Are Pushed Out

With the Push Count field, your sales teams can get important information about deal health. The Push Count field shows the number of times an opportunity's close date is pushed out by a calendar month.

Where: This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

How: The Push Count field is added to Pipeline Inspection by default and is also available in Opportunity list views.

SEE ALSO:

[Salesforce Help: Pipeline Inspection Metrics and Fields](#)

Core Sales Features

Show an additional forecast category: Most Likely. Save time when running territory assignment rules. Protect your product data with new sharing methods. And an enforced release update deletes your original territory management sharing records to prevent issues with Enterprise Territory Management.

IN THIS SECTION:

[Collaborative Forecasts](#)

In Lightning Experience, show a Most Likely forecast category on the forecasts page. And users can add the forecasts page to their bookmarks or favorites.

[Enterprise Territory Management](#)

Save time by selecting a subset of assignment rules to run or by pausing rules during account inserts.

[Products](#)

Use new sharing methods introduced in release updates that help protect your product data.

[Other Changes in Core Sales Features](#)

An enforced release update deletes your original territory management sharing records to prevent issues with Enterprise Territory Management. And we restructured the ForecastingSettings metadata type so that Metadata API works more efficiently with Collaborative Forecasts.

Collaborative Forecasts

In Lightning Experience, show a Most Likely forecast category on the forecasts page. And users can add the forecasts page to their bookmarks or favorites.

IN THIS SECTION:

[Track Forecast Categories Your Way](#)

Now you can add a Most Likely forecast category to the standard four categories. This change gives you more flexibility to reflect your business practices in Collaborative Forecasts.

[Bookmark Your Forecasts](#)

Users can make forecasts easy to find by adding the forecasts page to their bookmarks or favorites along with other pages they often visit. For example, sales managers can bookmark a sales rep's or territory's forecasts page for quick access.

SEE ALSO:

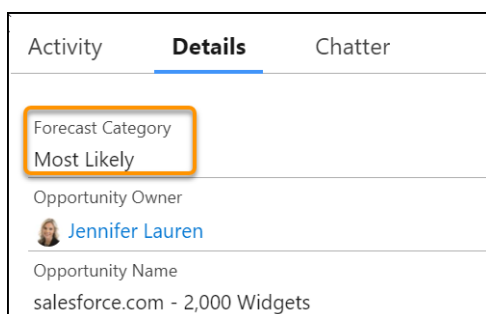
[ForecastingSettings Was Restructured](#)[New and Changed Objects](#)

Track Forecast Categories Your Way

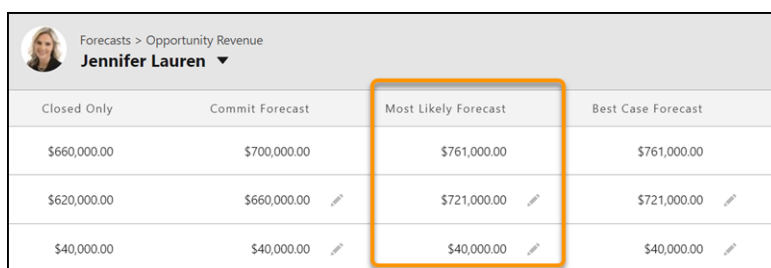
Now you can add a Most Likely forecast category to the standard four categories. This change gives you more flexibility to reflect your business practices in Collaborative Forecasts.

Where: This change applies to Lightning Experience and all versions of the mobile app in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.


Why: After the Most Likely category is added, it's available as a picklist value in the Forecast Category field on opportunities.



On the forecasts page in Lightning Experience, Most Likely appears between the Commit and Best Case categories.



Closed Only	Commit Forecast	Most Likely Forecast	Best Case Forecast
\$660,000.00	\$700,000.00	\$761,000.00	\$761,000.00
\$620,000.00	\$660,000.00	\$721,000.00	\$721,000.00
\$40,000.00	\$40,000.00	\$40,000.00	\$40,000.00

 **Note:** In Salesforce Classic, Most Likely doesn't appear as a column on the forecasts page, but Most Likely opportunities are included in the opportunities list. Their values are reflected in cumulative rollups for the Best Case and Open Pipeline categories and in the total rows.

In Pipeline Inspection, Most Likely is now included as a standalone pipeline metric. And it's included in the totals for other appropriate pipeline metrics. Users can also filter their pipelines by the Most Likely category.

How: In the object management settings for opportunities, create a Forecast Category picklist value by selecting **Most Likely** in the Status Category field.

Picklist Edit
Forecast Category

Enter a name for the picklist value below.

Label

API Name ⓘ

Status Category

Chart Color Assigned dynamically

Save Cancel

Then map Most Likely to one or more opportunity stages in the Stage field or assign opportunities individually to the Most Likely category.

Important: If you map Most Likely to an opportunity stage in a package, in a sandbox, or via Metadata API, without adding Most Likely in a target org, deployment to the target org fails. Before deployment from a package, from a sandbox, or via Metadata API, make sure that Most Likely is added in the target org.

Enterprise API supports forecast categories in Collaborative Forecasts and Pipeline Inspection.

SEE ALSO:

[Salesforce Help: Customize Forecast Categories in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

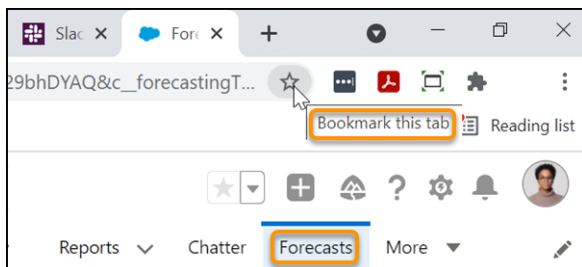
[Salesforce Help: View and Update Opportunity-Stage-to-Forecast-Category Mappings in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

Bookmark Your Forecasts

Users can make forecasts easy to find by adding the forecasts page to their bookmarks or favorites along with other pages they often visit. For example, sales managers can bookmark a sales rep's or territory's forecasts page for quick access.

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

How: Add the forecasts page to the bookmarks or favorites in your browser.



Enterprise Territory Management

Save time by selecting a subset of assignment rules to run or by pausing rules during account inserts.

IN THIS SECTION:

[Speed Up Account-Territory Assignment](#)

Choose a subset of accounts to include when you run territory assignment rules. For example, run rules only for New York accounts that were modified last month. Otherwise, assignment rules run for all accounts, which can take a long time.

[Put Assignment Rules on Pause](#)

To prevent performance issues, keep assignment rules from running during account inserts. You can run the assignment rules after the insert job is finished.

SEE ALSO:

[Delete Your Original Territory Management Sharing Records \(Release Update\)](#)

Speed Up Account-Territory Assignment

Choose a subset of accounts to include when you run territory assignment rules. For example, run rules only for New York accounts that were modified last month. Otherwise, assignment rules run for all accounts, which can take a long time.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: When you run assignment rules, select **Include a subset of accounts**, and then specify a last-modified date range, other filter criteria, or both. For other criteria, standard and custom account fields, excluding reference and picklist fields, are available.

SEE ALSO:

[Salesforce Help: Preview Territory Account Assignments \(can be outdated or unavailable during release preview\)](#)

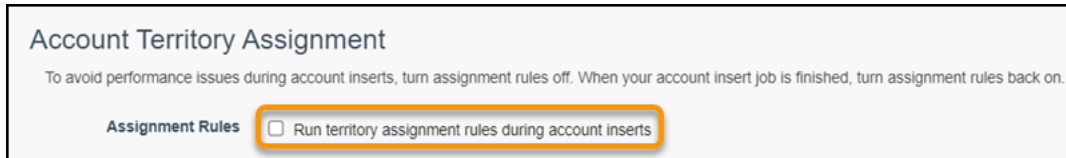
[Salesforce Help: Run Assignment Rules for a Territory \(can be outdated or unavailable during release preview\)](#)

Put Assignment Rules on Pause

To prevent performance issues, keep assignment rules from running during account inserts. You can run the assignment rules after the insert job is finished.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: On the Territory Settings page, deselect **Run territory assignment rules during account inserts** and save your changes.



To run assignment rules after you paused them, select **Run territory assignment rules during account inserts** and save your changes.

[Metadata API](#) supports Enterprise Territory Management.

Products

Use new sharing methods introduced in release updates that help protect your product data.

IN THIS SECTION:

[Set Organization-Wide Sharing for Products \(Release Update\)](#)

To better protect your Salesforce data, this update adds org-wide sharing settings for product records. As of Spring '22, in new orgs only, the update will set the org-wide sharing default for products to Private for external users. Sharing rules and manual sharing aren't supported. This update was first made available in Winter '22.

[Create Sharing Rules to Retain and Control Guest Users' Access to Products \(Release Update\)](#)

To better protect your Salesforce data, this update changes how unauthenticated guest access to product records is controlled. To prevent guest users from losing access to products, create and test guest user sharing rules. The Product org-wide sharing default for external users is no longer applied to guest users, and guest user access is set to Private. This setting can't be changed. This update was first made available in Winter '22.

Set Organization-Wide Sharing for Products (Release Update)

To better protect your Salesforce data, this update adds org-wide sharing settings for product records. As of Spring '22, in new orgs only, the update will set the org-wide sharing default for products to Private for external users. Sharing rules and manual sharing aren't supported. This update was first made available 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 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: You can now control users' access to product records, changing the default from Public Read/Write to a more restrictive setting if desired.

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Set Organization-Wide Sharing for Products, follow the testing and activation steps.

If you change the default settings, we recommend testing the changes in a sandbox before the enforcement date to ensure expected behavior.

1. Review the sharing settings. From Setup, enter *Sharing Settings*, and then select **Sharing Settings**. Review the org-wide defaults for Product. Decide whether to change the default sharing setting for your internal or external users.
2. Test the settings with all customizations, such as flows, validation rules, and Apex triggers. Sharing settings other than Public Read/Write can interfere with customizations.

 **Note:** When the org-wide sharing setting for products is Private, users can't amend or renew certain records.

- If the default is Private and you use the Large-Scale Amendment and Renewal service, users can't amend or renew assets.

- If the default is Private and you use the Legacy Amend/Renew service, users can't amend or renew assets or subscriptions.

SEE ALSO:

[Release Updates](#)[Organization-Wide Sharing Defaults](#)

Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)

To better protect your Salesforce data, this update changes how unauthenticated guest access to product records is controlled. To prevent guest users from losing access to products, create and test guest user sharing rules. The Product org-wide sharing default for external users is no longer applied to guest users, and guest user access is set to Private. This setting can't be changed. This update was first made available 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 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.

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Retain Guest Users' Access to Products, follow the testing and activation steps.

If you create guest user sharing rules, we recommend testing the rules in a sandbox before the enforcement date to ensure expected behavior.

1. Evaluate whether guest users need access to product records in Spring '22.
2. To give guest users product access, create guest user sharing rules.
3. Test your guest user sharing rules.
 - From Setup, in the Quick Find box, enter *Product Settings*, and then select **Product Settings**. Select **Enforce secure record access for guests accessing products**. Verify that guest users can access products according to your new rules. The setting **Secure guest user record access** isn't applied to products in Winter '22. It will be applied in Spring '22.
 - Sharing rules that restrict access can interfere with customizations. Review and test all customizations such as flows, validation rules, and Apex triggers to ensure that they're compatible with your new rules.

SEE ALSO:

[Release Updates](#)[Secure Guest Users' Sharing Settings and Record Access](#)

Other Changes in Core Sales Features

An enforced release update deletes your original territory management sharing records to prevent issues with Enterprise Territory Management. And we restructured the ForecastingSettings metadata type so that Metadata API works more efficiently with Collaborative Forecasts.

IN THIS SECTION:

[Delete Your Original Territory Management Sharing Records \(Release Update\)](#)

With this update, your original territory management sharing records are deleted to prevent issues in Enterprise Territory Management. This update was first made available in Summer '21 and is enforced in Winter '22.

ForecastingSettings Was Restructured

We removed the `adjustmentsSettings`, `forecastRangeSettings`, and `quotasSettings` fields from the `ForecastingTypeSettings` metadata type and added the `globalAdjustmentsSettings`, `globalForecastRangeSettings`, and `globalQuotasSettings` fields to the `ForecastingSettings` metadata type. Collaborative Forecasts settings now apply to all forecast types, and Metadata API works more efficiently with forecast types introduced in Summer '21.

Send Notifications When Updating Lead Owners via APEX

Now when a lead's owner is updated via APEX, you can send the new owner an email automatically.

Delete Your Original Territory Management Sharing Records (Release Update)

With this update, your original territory management sharing records are deleted to prevent issues in Enterprise Territory Management. This update was first made available in Summer '21 and is enforced in Winter '22.

Where: This change applies to Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

When: This update was first available in 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: 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: With this update, the `enableRemoveTMGroupMembership` field on the `SharingSettings` Metadata API type is set to `true`. Records based on original territory management sharing no longer appear in reports, and users can no longer access records based on original territory management sharing.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Delete Your Original Territory Management Sharing Records, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Knowledge Article: Migrating from Original Territory Management to Enterprise Territory Management](#)

ForecastingSettings Was Restructured

We removed the `adjustmentsSettings`, `forecastRangeSettings`, and `quotasSettings` fields from the `ForecastingTypeSettings` metadata type and added the `globalAdjustmentsSettings`, `globalForecastRangeSettings`, and `globalQuotasSettings` fields to the `ForecastingSettings` metadata type. Collaborative Forecasts settings now apply to all forecast types, and Metadata API works more efficiently with forecast types introduced in Summer '21.

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

[Metadata API](#) supports forecast types in Collaborative Forecasts.

Send Notifications When Updating Lead Owners via APEX

Now when a lead's owner is updated via APEX, you can send the new owner an email automatically.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: In Lead Setup, turn on Notify New Lead Owner When Updated via APEX.

Productivity Features

Include Inbox users in any Einstein Activity Capture configuration. Easily add predefined columns to your email templates in email template builder. Enjoy new ways to filter and sort activities.

IN THIS SECTION:

[Einstein Activity Capture](#)

Include Inbox users in any configuration. See consistent event data on the activity timeline and standard reports. Add the Recommended Connections component with fewer clicks. A new email insight lets sales reps see when a commitment was made to a customer or prospect.

[Email Experience](#)

Join a pilot for choosing how to send list emails.

[Email Templates](#)

With Email Template Builder it's easy to add pre-built column layouts to your template and then add padding between the columns. Inline references to Salesforce files and images are automatically maintained when a package is installed or a change set is received.

[Activities](#)

Enjoy a new option to sort upcoming and overdue activities. Get more details on closed activities and tasks.

[Salesforce Inbox](#)

Check out the latest improvements to Salesforce Inbox.

[WDC \(Legacy Work.com\)](#)

WDC is scheduled for retirement in Spring '22.

Einstein Activity Capture

Include Inbox users in any configuration. See consistent event data on the activity timeline and standard reports. Add the Recommended Connections component with fewer clicks. A new email insight lets sales reps see when a commitment was made to a customer or prospect.

IN THIS SECTION:

[Include Salesforce Inbox Users in Any Einstein Activity Capture Configuration](#)

To give you more flexibility with Einstein Activity Capture, you can now add Salesforce Inbox users to configurations that have emails, events, or contacts disabled. Or, you can add Inbox users to configurations that have events or contacts moving from Salesforce to the connected account. Previously, Inbox users could only be included in configurations with all three data types enabled. And events and contacts had to move both ways or from the connected account to Salesforce. Plus, now when emails are disabled, Inbox users can manually log emails from the Outlook or Gmail integration sidebar.

[See Consistent Event Data on the Activity Timeline and in Standard Reports](#)

To ensure a consistent user experience, the activity timeline can show only events that are Salesforce records. Then the event data in timeline and in standard reports matches, so you see a truer picture of your company's activities.

[Add the Recommended Connections Component to Standard Layouts with Fewer Clicks](#)

Show your sales teams which colleagues have the strongest connection to a prospect. With just a single click you can add the Recommended Connections component to standard contact, lead, and person account page layouts. Previously, you added the component to each standard layout.

[Prevent Sensitive Information from Appearing on the Activity Timeline](#)

To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify emails with sensitive information such as social security numbers and login credentials, and then keep them private. Previously, only automated emails were reviewed to filter out sensitive information.

[See When a Commitment Is Made to a Customer or Prospect](#)

Knowing when a commitment is made to a customer or prospect makes it easier for sales teams to follow through. The new Commitment Made email insight shows that a sales rep expressed an intention to take action. Some commitments are associated with a date, and some are more general. For example, these statements are flagged as commitments: I plan to send the proposal by Tuesday morning, and, I'm working to get you an updated invoice as soon as possible.

[Ensure that User Data Doesn't Move Until Setup Is Complete](#)

Prevent situations where Salesforce brings in users' data before you finish setting up Einstein Activity Capture. Now you assign each user to a configuration before any data is moved between the connected account and Salesforce.

[Choose Whether the Activities Dashboard Is Available](#)

The Activities dashboard shows a summary of sales activities, added manually and with Einstein Activity Capture, including calls, emails, events, and tasks. Now, you choose whether the dashboard is available to Einstein Activity Capture users. Previously, the dashboard was available automatically.

Include Salesforce Inbox Users in Any Einstein Activity Capture Configuration

To give you more flexibility with Einstein Activity Capture, you can now add Salesforce Inbox users to configurations that have emails, events, or contacts disabled. Or, you can add Inbox users to configurations that have events or contacts moving from Salesforce to the connected account. Previously, Inbox users could only be included in configurations with all three data types enabled. And events and contacts had to move both ways or from the connected account to Salesforce. Plus, now when emails are disabled, Inbox users can manually log emails from the Outlook or Gmail integration sidebar.

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

How: From any Einstein Activity Capture configuration, add Inbox users to the Selected Users list. If Inbox users are in a configuration with Emails disabled, email data continues to be captured and used for Inbox productivity features.

SEE ALSO:

[Log Emails Manually from the Outlook Integration with Inbox When Einstein Activity Capture Is On](#)

[Log Emails Manually from the Gmail Integration with Inbox When Einstein Activity Capture Is On](#)

See Consistent Event Data on the Activity Timeline and in Standard Reports

To ensure a consistent user experience, the activity timeline can show only events that are Salesforce records. Then the event data in timeline and in standard reports matches, so you see a truer picture of your company's activities.

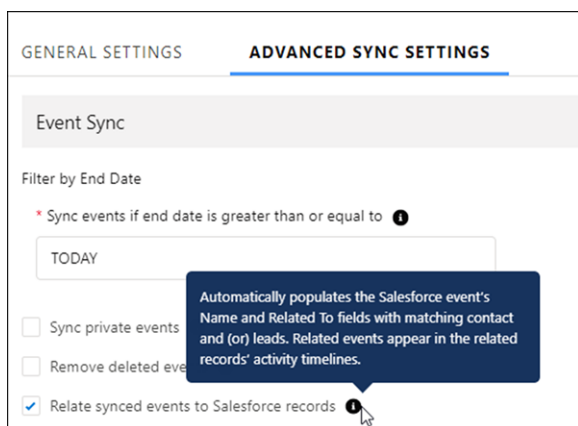
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: From the Einstein Activity Capture settings in setup, go to the Settings tab. In the Event Settings section, turn on **Only Show Events that are Salesforce Records**. If you're new to Einstein Activity Capture, the setting is on by default.

When the setting is on, the events that Einstein Activity Capture users are included in get added automatically to the activity timeline of related account, contact, and leads records. Because the events on the timeline are Salesforce records, they're available in standard reports and other Salesforce Platform capabilities.

When the setting is off, the events get added automatically to the activity timeline of additional records: opportunities, contracts, and quotes. But the events aren't Salesforce records and aren't reflected in reports and other Salesforce Platform capabilities.

To ensure that events appear on the activity timeline as Salesforce records, make sure that the Relate synced events to Salesforce records option is selected. It's available from a configuration's advanced settings and is selected by default.



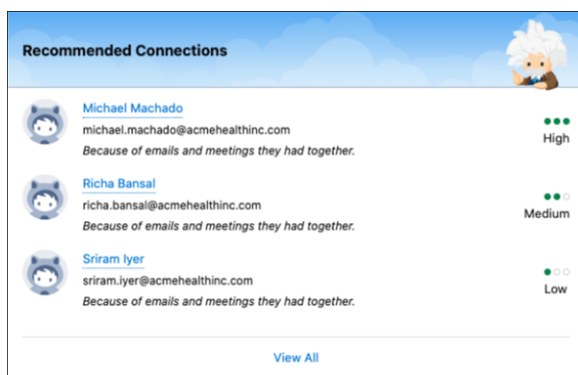
Add the Recommended Connections Component to Standard Layouts with Fewer Clicks

Show your sales teams which colleagues have the strongest connection to a prospect. With just a single click you can add the Recommend Connections component to standard contact, lead, and person account page layouts. Previously, you added the component to each standard layout.

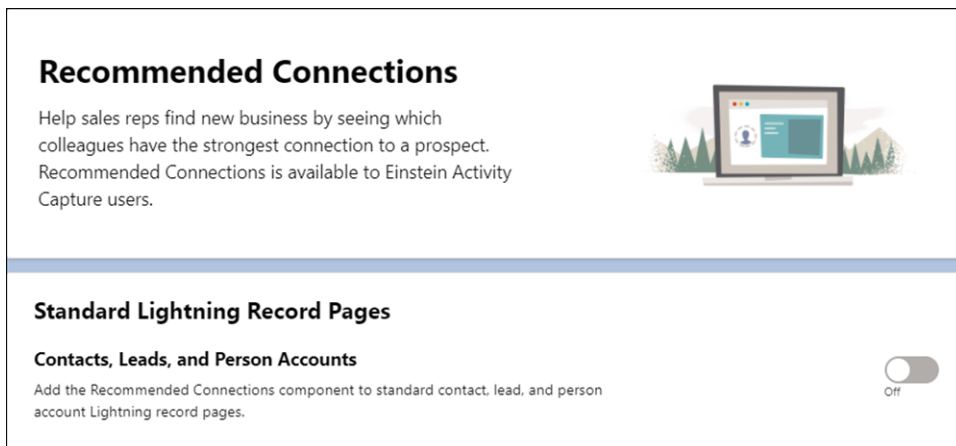
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: To see the Recommended Connections component, users must have a Sales Cloud Einstein, Inbox, or High Velocity Sales license.

Why: Sales reps can reach out to colleagues with strong connections to the prospect, and then colleagues can help get conversations going with the prospect.



How: From Setup, go to the Recommended Connections page under Einstein Activity Capture. Add the component to standard contact, lead, and person account Lightning record pages. Use the Lightning App Builder to add the component to custom Lightning page layouts.



SEE ALSO:

[Salesforce Help: Add Recommended Connections to Lightning Pages \(can be outdated or unavailable during release preview\)](#)

Prevent Sensitive Information from Appearing on the Activity Timeline

To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify emails with sensitive information such as social security numbers and login credentials, and then keep them private. Previously, only automated emails were reviewed to filter out sensitive information.

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

Why: To enhance security, Einstein Activity Capture now attempts to identify emails with sensitive information before they're added to the timeline and set sharing to Don't Share. The emails are marked as sensitive so that users know why the sharing setting was changed.

For example, if a user receives a customer email confirming a purchase that includes a credit card number, the email is visible only to the recipient. The email owner can later change the sharing setting to something less restrictive.

How: The filters that look for automated replies and nonautomated replies with sensitive information are on by default. You can contact Salesforce Support to turn them off.

SEE ALSO:

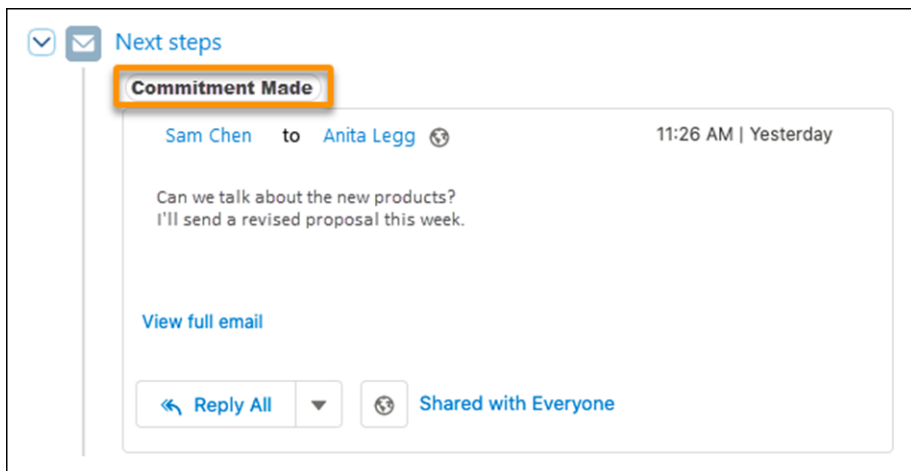
[Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

See When a Commitment Is Made to a Customer or Prospect

Knowing when a commitment is made to a customer or prospect makes it easier for sales teams to follow through. The new Commitment Made email insight shows that a sales rep expressed an intention to take action. Some commitments are associated with a date, and some are more general. For example, these statements are flagged as commitments: I plan to send the proposal by Tuesday morning, and, I'm working to get you an updated invoice as soon as possible.

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

How: The activity timeline shows which emails include commitments.



SEE ALSO:

[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

Ensure that User Data Doesn't Move Until Setup Is Complete

Prevent situations where Salesforce brings in users' data before you finish setting up Einstein Activity Capture. Now you assign each user to a configuration before any data is moved between the connected account and Salesforce.

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

Who: Einstein Activity Capture users who have access to Inbox aren't required to be in configurations. In order for their data to be used by Inbox productivity features, their data starts moving after they connect an account.

SEE ALSO:

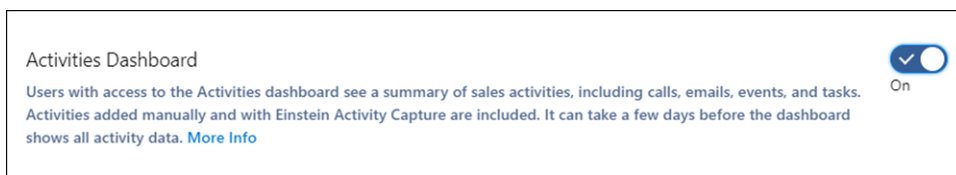
[Salesforce Help: Create a Configuration for Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Choose Whether the Activities Dashboard Is Available

The Activities dashboard shows a summary of sales activities, added manually and with Einstein Activity Capture, including calls, emails, events, and tasks. Now, you choose whether the dashboard is available to Einstein Activity Capture users. Previously, the dashboard was available automatically.

Where: This change applies to Lightning Experience in Professional (when API access is purchased), Enterprise, Performance, and Unlimited editions.

How: From Setup, go to the Einstein Activity Capture settings. From the General section on the Settings tab, turn on **Activities Dashboard**. It can take a few days before the dashboard shows all activity data. If you already use Einstein Activity Capture, the setting is on by default.



SEE ALSO:

[Salesforce Help: Activities Dashboard \(can be outdated or unavailable during release preview\)](#)

Email Experience

Join a pilot for choosing how to send list emails.

IN THIS SECTION:

[Send List Email Your Way \(Pilot\)](#)

Let your sales reps choose how to send their list emails. Now, reps can send list emails through Gmail, Office 365, or Microsoft Exchange. Previously, reps could send list emails via Salesforce only.


[Use List Emails for Sales Cadence Automated Emails Automatically](#)

Now sales cadence automated emails are sent as a list email.

Send List Email Your Way (Pilot)

Let your sales reps choose how to send their list emails. Now, reps can send list emails through 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](#).

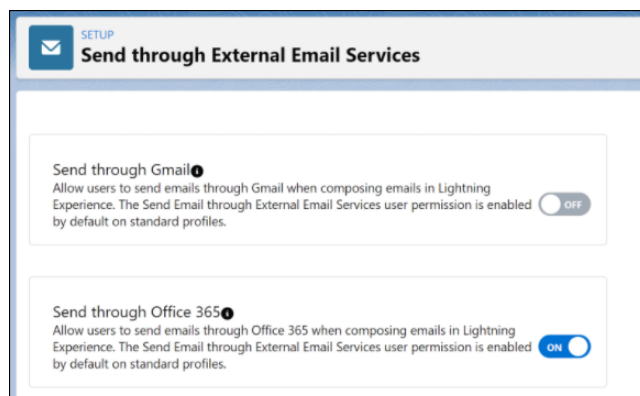
Use of this feature is subject to the [Salesforce Acceptable Use Policy](#).

Contact your Salesforce account executive to learn more about participating in this pilot.

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 emails look like a user sent them directly instead of an email automation. Recipients are more likely to open emails that look like they were sent directly. Also, list emails are in the user's sent folder, so the send history is intact.

How: For Gmail and Office 365, from 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 Office365 users:

The screenshot shows the 'My Email Settings' page. Under the 'Outgoing Email Settings' section, there are two radio button options: 'Send through Salesforce' and 'Send through Gmail'. The 'Send through Gmail' option is selected. Below this, there is a section titled 'List Emails' which also has two radio button options: 'Send through Salesforce' and 'Send through Gmail'. The 'Send through Gmail' option is selected. The 'List Emails' section is highlighted with an orange border.

The screenshot shows the 'My Email Settings' page. Under the 'Outgoing Email Settings' section, there are two radio button options: 'Send through Salesforce' and 'Send through Office 365'. The 'Send through Office 365' option is selected. Below this, there is a section titled 'List Emails' which also has two radio button options: 'Send through Salesforce' and 'Send through Office 365'. The 'Send through Office 365' option is selected. The 'List Emails' section is highlighted with an orange border.

For Microsoft Exchange users with an Inbox license:

The screenshot shows the 'My Email Settings' page. Under the 'Outgoing Email Settings' section, there is a message: 'Emails are sent from the connected account.' Below this, there is a section titled 'List Emails' which has two radio button options: 'Send through Salesforce' and 'Send through connected account'. The 'Send through connected account' option is selected. The 'List Emails' section is highlighted with an orange border.

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)

Use List Emails for Sales Cadence Automated Emails Automatically

Now sales cadence automated emails are sent as a list email.

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

Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

SEE ALSO:

[Send Sales Cadence Automated Emails as List Emails to Save Data](#)

Email Templates

With Email Template Builder it's easy to add pre-built column layouts to your template and then add padding between the columns. Inline references to Salesforce files and images are automatically maintained when a package is installed or a change set is received.

IN THIS SECTION:

[Add Rows and Columns in Email Template Builder](#)

Use the Layout component to easily add a row to an Email Template Builder template. Select a layout with no columns or a preconfigured set of up to four columns. This component replaces the Row component.

[Get Some Breathing Room with Column Padding in Email Template Builder](#)

In Email Template Builder, give columns some definition with padding between each column. Previously, users padded individual columns, and now they can evenly pad space between all columns.

[Add Variety with Indentations in Rich Text Components in Email Template Builder](#)

Indented text creates visual variety and organizes text in Email Template Builder templates. Varying the indentation of text emphasizes that text and makes it easier for email recipients to notice it.

[Navigate More Easily with Breadcrumbs in Email Template Builder](#)

As your Email Template Builder users change component styles, breadcrumbs help guide them back to where they started.

[Include Salesforce Inline Image References in Email Template Builder Packages and Change Sets](#)

There's no need to recreate references to inline Salesforce images after installing a package or receiving a change set. Email Template Builder email templates can now include inline references to Salesforce files and images. These references are included in the package or change set and maintained when the package is installed or the change set is received.

[Say More in a Lightning Email Template's Subject](#)

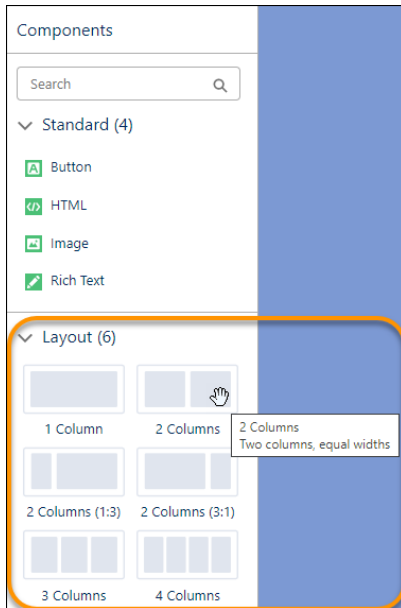
Engage your readers with a longer, more descriptive subject line. The Subject field in Lightning email templates, including email templates created in Email Template Builder, can now be up to 1,000 characters long. Previously, the limit was 230 characters.

Add Rows and Columns in Email Template Builder

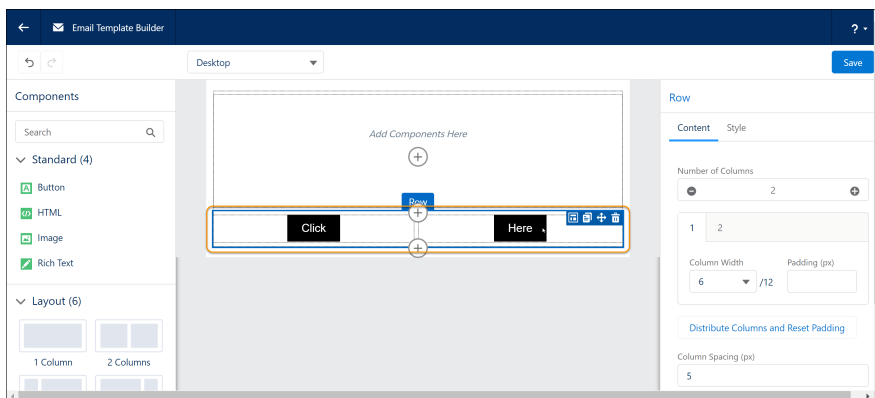
Use the Layout component to easily add a row to an Email Template Builder template. Select a layout with no columns or a preconfigured set of up to four columns. This component replaces the Row component.

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: In Email Template Builder, select a column layout and drag it to the canvas. Then add components to the columns.



The columns then appear on the canvas.



 **Note:** This change also appears in templates created in Email Content Builder.

SEE ALSO:

[Add Rows and Columns in Email Content Builder Email Templates](#)

[Salesforce Help: Email Template Builder \(can be outdated or unavailable during release preview\)](#)

Get Some Breathing Room with Column Padding in Email Template Builder

In Email Template Builder, give columns some definition with padding between each column. Previously, users padded individual columns, and now they can evenly pad space between all columns.

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: To adjust the spacing between every column at the same time, change the Column Spacing (px) value.

Row

Content Style

Number of Columns

2

1 2

Column Width

6 /12

Padding (px)

Distribute Columns and Reset Padding

Column Spacing (px)

5

Row

Content Style

Number of Columns

2

1 2

Column Width

6 /12

Padding (px)

Distribute Columns and Reset Padding

Column Spacing (px)

5

 **Note:** This change also appears in templates created in Email Content Builder.

SEE ALSO:

[Spread Out in Email Content Builder Email Templates with Column Padding](#)

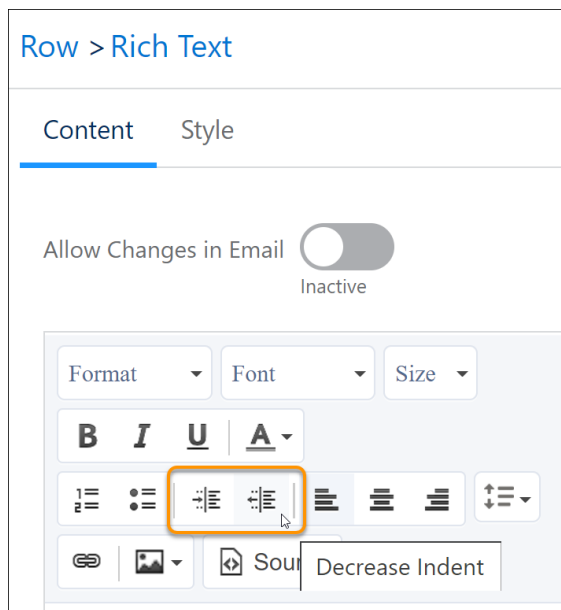
[Salesforce Help: Email Template Builder \(can be outdated or unavailable during release preview\)](#)

Add Variety with Indentations in Rich Text Components in Email Template Builder

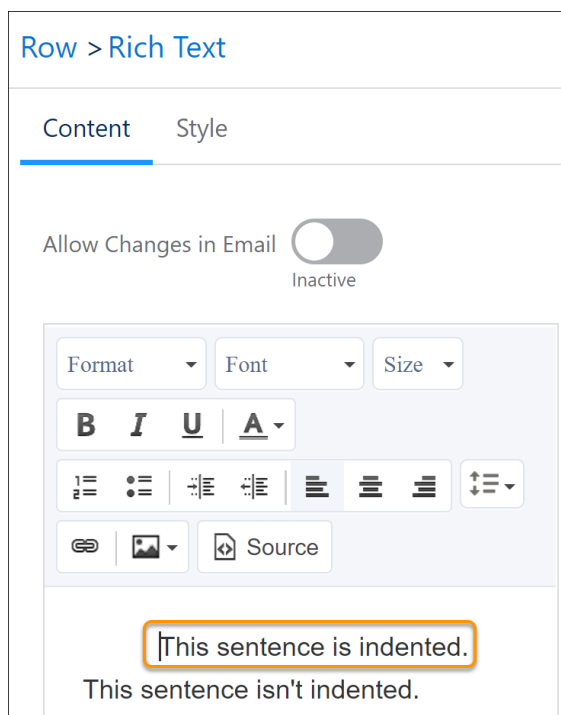
Indented text creates visual variety and organizes text in Email Template Builder templates. Varying the indentation of text emphasizes that text and makes it easier for email recipients to notice it.

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: To adjust text, in the Rich Text component, click the **Increase Indent** and **Decrease Indent** buttons.



You see the changes in your text.



 **Note:** This change also appears in templates created in Email Content Builder.

SEE ALSO:

[Indent Text in Rich Text Components in Email Content Builder Email Templates](#)

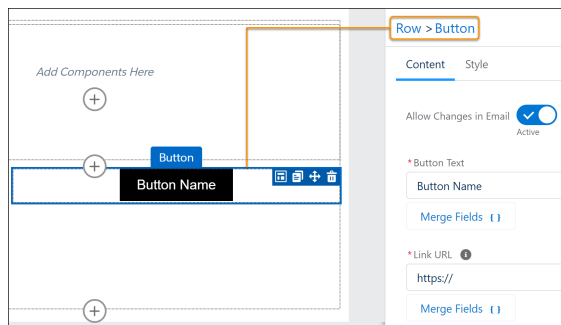
[Salesforce Help: Email Template Builder \(can be outdated or unavailable during release preview\)](#)

Navigate More Easily with Breadcrumbs in Email Template Builder

As your Email Template Builder users change component styles, breadcrumbs help guide them back to where they started.

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: In this example, breadcrumbs show users whether they selected the row or the button component.



 **Note:** This change also appears in templates created in Email Content Builder.

SEE ALSO:

[Navigate More Easily in Email Content Builder Email Templates with Breadcrumbs](#)

[Salesforce Help: Email Template Builder \(can be outdated or unavailable during release preview\)](#)

Include Salesforce Inline Image References in Email Template Builder Packages and Change Sets

There's no need to recreate references to inline Salesforce images after installing a package or receiving a change set. Email Template Builder email templates can now include inline references to Salesforce files and images. These references are included in the package or change set and maintained when the package is installed or the change set is received.

Where: This change applies to Lightning Experience in Developer Edition.

SEE ALSO:

[Salesforce Help: Special Behavior of Components in Packages \(can be outdated or unavailable during release preview\)](#)

Say More in a Lightning Email Template's Subject

Engage your readers with a longer, more descriptive subject line. The Subject field in Lightning email templates, including email templates created in Email Template Builder, can now be up to 1,000 characters long. Previously, the limit was 230 characters.

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

Activities

Enjoy a new option to sort upcoming and overdue activities. Get more details on closed activities and tasks.

IN THIS SECTION:

[Sort Upcoming & Overdue Activities Intuitively](#)

Choose to show your upcoming activities in the order that makes sense to you. Now you can show the activity timeline with the newest item on your calendar at the top of the list followed by your other activities. Previously, the activity timeline showed the oldest item at the top.

[Filter and Sort the Activity Timeline with a New Icon](#)

Use the gear icon to access the new sort order setting and your other filter options. Previously, the gear was a funnel icon.

[Update Tasks and Events Reports for More Accurate Data](#)

Use the new field `CompletedDateTime` to show the date and the time that a task was completed. Add the Completed Date and Time column to your reports.

[Split Bulk Queries on the TaskRelation Table with PK Chunking](#)

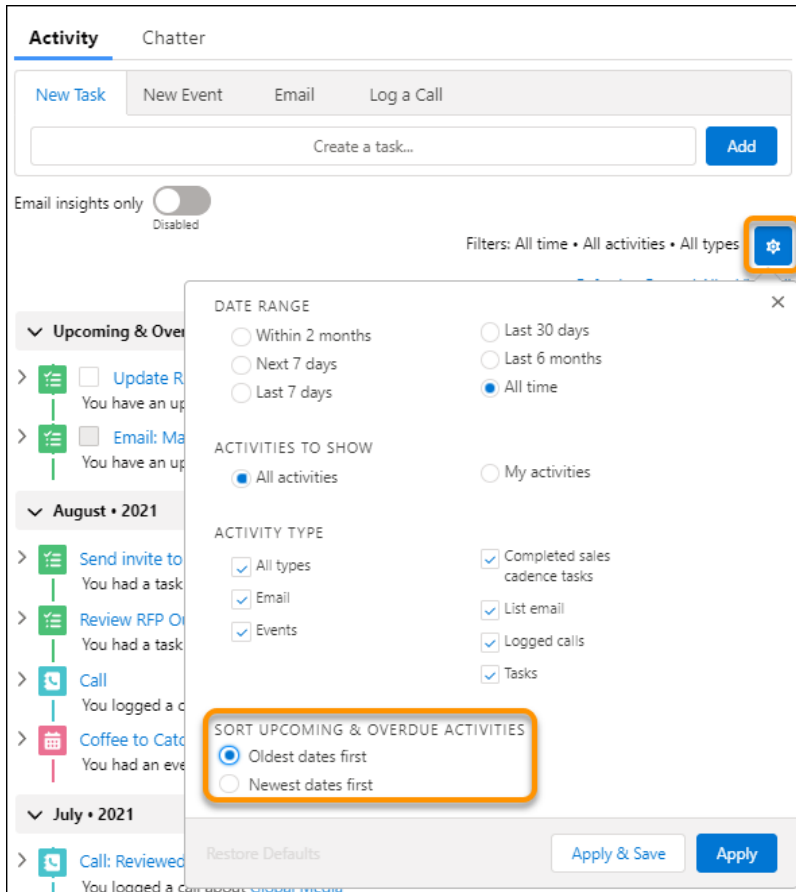
Automatically split bulk queries into chunks to maximize your daily batch limit. Use primary key (PK) chunking, designed to extract data from entire tables, with the TaskRelation table. Each chunk is processed as a separate batch that counts toward your daily batch limit.

Sort Upcoming & Overdue Activities Intuitively


Choose to show your upcoming activities in the order that makes sense to you. Now you can show the activity timeline with the newest item on your calendar at the top of the list followed by your other activities. Previously, the activity timeline showed the oldest item at the top.

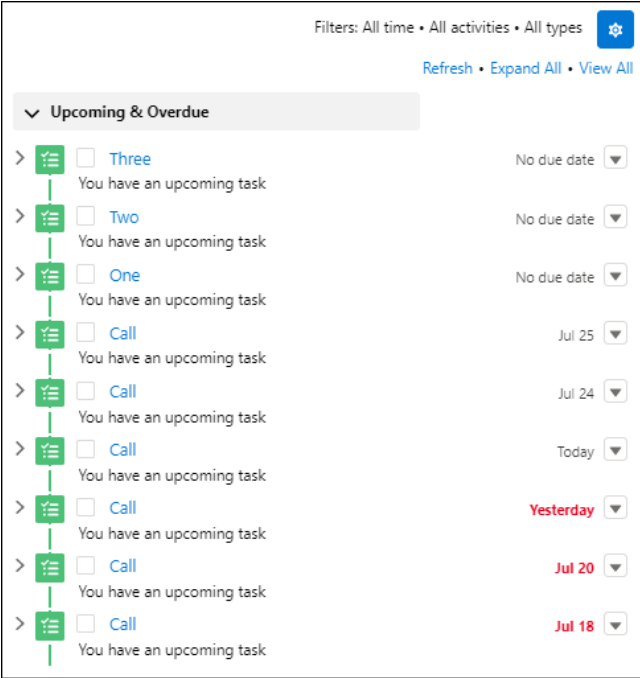
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Click the gear to open the Settings panel.



Select **Newest dates first**. Now your upcoming and overdue activities are ordered with today's items toward the top.

 **Note:** **Newest dates first** is the default.



SEE ALSO:

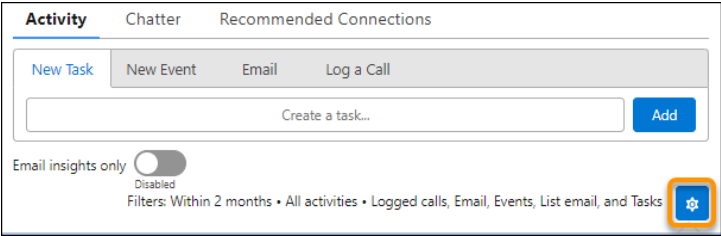
- [Filter and Sort the Activity Timeline with a New Icon](#)
- [Salesforce Help: Activity Timeline \(can be outdated or unavailable during release preview\)](#)

Filter and Sort the Activity Timeline with a New Icon

Use the gear icon to access the new sort order setting and your other filter options. Previously, the gear was a funnel icon.

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

How: Click the gear to open the panel.



SEE ALSO:

- [Sort Upcoming & Overdue Activities Intuitively](#)

Update Tasks and Events Reports for More Accurate Data

Use the new field `CompletedDateTime` to show the date and the time that a task was completed. Add the Completed Date and Time column to your reports.

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

SEE ALSO:

[Salesforce Help: Reports \(can be outdated or unavailable during release preview\)](#)

Split Bulk Queries on the TaskRelation Table with PK Chunking

Automatically split bulk queries into chunks to maximize your daily batch limit. Use primary key (PK) chunking, designed to extract data from entire tables, with the TaskRelation table. Each chunk is processed as a separate batch that counts toward your daily batch limit.

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

SEE ALSO:

[Salesforce Developer Help: PK Chunking Header \(can be outdated or unavailable during release preview\)](#)

Salesforce Inbox

Check out the latest improvements to Salesforce Inbox.

IN THIS SECTION:

[Salesforce Inbox](#)

Salesforce Inbox integrates your email and calendar with Salesforce, so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

Salesforce Inbox

Salesforce Inbox integrates your email and calendar with Salesforce, so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at the desk.

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- [Inbox Mobile for iOS](#)
- [Inbox Mobile for Android](#)

To learn about the latest features and enhancements in Inbox desktop, see these sections of the release notes.

- [Outlook Integration](#)
- [Gmail Integration](#)
- [Email Experience](#)

WDC (Legacy Work.com)

WDC is scheduled for retirement in Spring '22.

IN THIS SECTION:

[WDC \(Legacy Work.com\) Is Being Retired](#)

WDC is scheduled for retirement in Spring '22. We are planning to retire features and records created by WDC Goals, Coaching, Feedback, Performance, and Rewards in or around February 2022, when orgs upgrade to the Spring '22 release. WDC features and records from Badges, Skills, and Community Thanks are not affected and will remain available in the application beyond Spring '22.

WDC (Legacy Work.com) Is Being Retired

WDC is scheduled for retirement in Spring '22. We are planning to retire features and records created by WDC Goals, Coaching, Feedback, Performance, and Rewards in or around February 2022, when orgs upgrade to the Spring '22 release. WDC features and records from Badges, Skills, and Community Thanks are not affected and will remain available in the application beyond Spring '22.

Where: This applies to Salesforce Classic. WDC is available as an add-on license for Professional, Enterprise, Unlimited, and Developer editions, and is included in Performance Edition.



Note: On May 1, 2020, we rebranded this suite. It's now called WDC. If you're looking for information about our Work.com solution in response to the COVID-19 crisis, see [Return to the Workplace with Work.com](#).

When: After Spring '22 rolls out in your org, features and records created with these features, will no longer be visible or otherwise accessible in the application.

SEE ALSO:

[Knowledge Article: Phased WDC \(Legacy Work.com\) Feature Retirement](#)

Einstein Conversation Insights

Einstein Conversation Insights can now match voice and video calls to related opportunities automatically. New filters allow users to see call data sorted by opportunity or lead details, and video calls show more call participant details.

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:

[Match Opportunities to Voice and Video Calls Automatically](#)

Einstein Conversation Insights can match voice and video calls to related opportunities automatically.

[Filter by Opportunity Stage, Opportunity Amount, and Lead Status](#)

Want to see all the calls related to late-stage deals over a certain amount? Now you can! Use new filters to see call data sorted by opportunity or lead details.

[Video Calls Display Title and Opportunity Contact Role](#)

See more relevant details directly on video call records. Users can now see a contact's company name, title, and contact role.

[Analyze Service Calls in a Dedicated Conversation Insights Dashboard](#)

Service managers can use the new Einstein Conversation Insights dashboard to review service call data. Previously, sales and service calls were displayed in one dashboard. ECI for Service users can apply service-specific filters to hone in on the data they care about.

[Use Service Cloud Voice with Partner Telephony \(Pilot\)](#)

Einstein Conversation Insights is now supported by Service Cloud Voice with Partner Telephony and Service Cloud Voice with Partner Telephony from Amazon Connect.

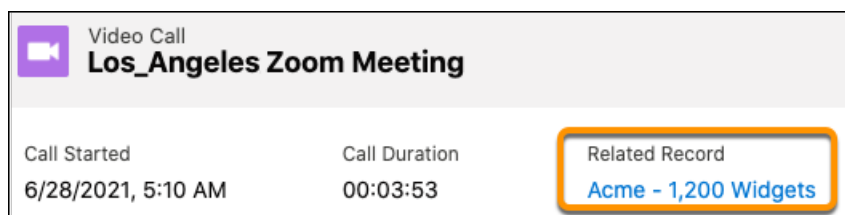
Match Opportunities to Voice and Video Calls Automatically

Einstein Conversation Insights can match voice and video calls to related opportunities automatically.

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 Sales.

Why: Einstein Conversation Insights matches related opportunity records to the **Related Record** field of voice and video call records.



Opportunities are matched based on call participants listed as opportunity contact roles. Closed opportunities and opportunities that haven't been modified within two years aren't included. If multiple opportunities are related, the most relevant one is matched based on call participants and the last modified date.

For voice calls, the user placing the call needs access to the related opportunity for it to be matched.

How: Turn on Opportunity Matching from General Settings under Conversation Insights in Setup.

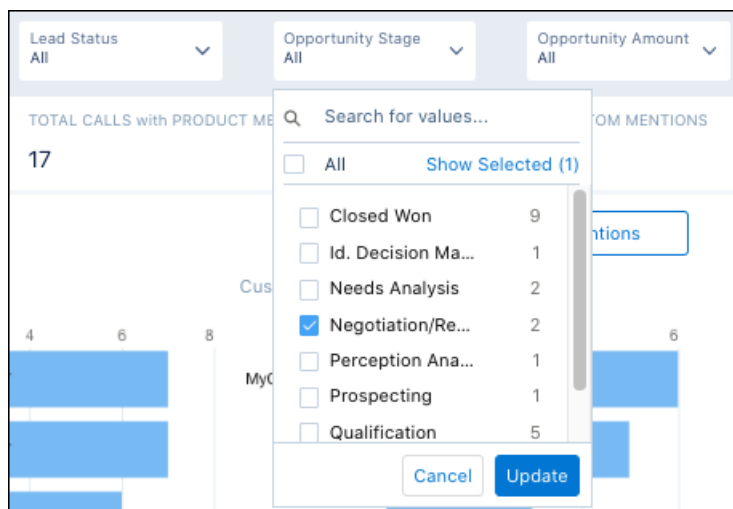


Filter by Opportunity Stage, Opportunity Amount, and Lead Status

Want to see all the calls related to late-stage deals over a certain amount? Now you can! Use new filters to see call data sorted by opportunity or lead details.

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: Filter calls by lead status, opportunity stage, or opportunity amount from the Conversation Insights dashboard.



The opportunity amount filter doesn't support the currency format or decimals. When entering a new value in the opportunity amount filter, tab out of the widget to update the dashboard with your changes.

Video Calls Display Title and Opportunity Contact Role

See more relevant details directly on video call records. Users can now see a contact's company name, title, and contact role.

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: Video call records display a participant's company name and title based on their contact record. The contact role is also shown if they're part of a related opportunity.

Analyze Service Calls in a Dedicated Conversation Insights Dashboard

Service managers can use the new Einstein Conversation Insights dashboard to review service call data. Previously, sales and service calls were displayed in one dashboard. ECI for Service users can apply service-specific filters to hone in on the data they care about.

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: Users with the Conversation Insights for Service permission set can see the Einstein Conversation Insights for Service dashboard. If users have the Conversation Insights for Sales or High Velocity Sales permission sets, they see the Sales dashboard. Users who have both the Service and the Sales permission sets see the Sales dashboard.

How: In the Service Console, click the Conversation Insights tab to view the dashboard. The dashboard shows only the voice calls made by users with ECI for Service.

SEE ALSO:

[Analyze Service Calls in the Einstein Conversation Insights Dashboard](#)

Use Service Cloud Voice with Partner Telephony (Pilot)

Einstein Conversation Insights is now supported by Service Cloud Voice with Partner Telephony and Service Cloud Voice with Partner Telephony from Amazon Connect.

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.

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: This feature isn't 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.

How: Contact your Salesforce account executive to learn more about participating in this pilot.

SEE ALSO:

[Get Actionable Call Insights with Einstein Conversation Insights for Partner Telephony \(Pilot\)](#)

Salesforce Maps

Automate as many as 5,000 territory assignments, plot any Salesforce data on the map, and help your reps find new business using filters for key demographics. Plan strategic territories using heat maps to visualize attributes that matter to your teams. Keep drivers focused on the road when you automate reporting of their locations, trip-related data, and availability to pick up work using the Salesforce mobile app for iOS.

IN THIS SECTION:

[Salesforce Maps](#)

Automate territory assignments for complex territories, plot records on the map using addresses from a related object's records, and discover untapped markets when you filter demographic data.

[Salesforce Maps Territory Planning](#)

Design territories for in-person and virtual customer visits. Gain insight on where to position sales and service resources when you visualize key attributes on a heat map. And export territory models, areas, containers, and units for proprietary and third-party territory management systems.

[Salesforce Maps Live Tracking](#)

Keep drivers focused on their trips and streamline their reporting responsibilities. Capture work-related miles in drive trip records using your drivers' iOS mobile devices—all in the Salesforce mobile app.

Salesforce Maps

Automate territory assignments for complex territories, plot records on the map using addresses from a related object's records, and discover untapped markets when you filter demographic data.

IN THIS SECTION:

[Automate Assignments for More Territories](#)

Create as many as 5,000 assignment rules to support large sales teams. Run assignment plans in intervals that align with your team's goals. For example, you create an assignment plan that assigns leads to sales reps. To assign leads quickly, schedule the plan to run in 1-hour intervals.

Plot Any Salesforce Data on the Map

Visualize record data for objects that rely on addresses from a related object in Salesforce Maps. For example, your reps work with consumer goods and want to plot visit records, but the records don't include addresses. To get visit records to appear on the map, set up your Visit base object to include address fields from Retail Store or other related objects.

Identify Potential Customers Within Specific Markets

Encourage your reps to find new customers in untapped markets when they plot a data layer using the Demographic Context (USA) data source in Salesforce Maps. Sales and service reps create filters that narrow their focus to a specific population or location. Then your reps apply styling for visualizing categories that can present promising business opportunities.

Fill Gaps in Today's Schedule from a Desktop

Make the most of your reps' last-minute availability for more customer visits when you add stops to their current day's schedules. You can now optimize schedules that include ad hoc changes for the current day from a desktop in Salesforce Maps.

Automate Assignments for More Territories

Create as many as 5,000 assignment rules to support large sales teams. Run assignment plans in intervals that align with your team's goals. For example, you create an assignment plan that assigns leads to sales reps. To assign leads quickly, schedule the plan to run in 1-hour intervals.

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

How: A new, more intuitive setup experience helps you manage assignment plans and schedule them to run at specific intervals.

Assignment Plans

Status	Plan Name	Object	Description	Rules	Created On	Last Run
Active	Pacific Northwest Farming	Account		1	7/22/2021 2:39 PM	7/27/2021 7:15 AM
Active	Northern California Kitchen Equipment	Account		1	7/22/2021 3:16 PM	7/27/2021 7:15 AM

Scheduled Plans

Plans that Felix Ayaso scheduled to run every 1 hours: 2

Status	Plan Name	Errors	Records Assigned	Records Excluded	Started On	Finished On
Completed	Northern Californi...	30	0	83	7/27/2021 7:16 ...	7/27/2021 7:16 ...
Queued	Pacific Northwest ...	0	0	0		

You choose the intervals for running schedule assignment plans.

Set schedule

Turn on scheduling and set the frequency for running active assignment plans.

☒ Run schedule

* Intervals

1-Hour

1-Hour

2-Hour

4-Hour

8-Hour

24-Hour

Or tailor your assignment plan intervals to your company's requirements using the `AssignRecords()` Apex method.

SEE ALSO:

[Salesforce Help: Automate Assignments for Salesforce Records \(can be outdated or unavailable during release preview\)](#)

[Salesforce Maps Developer Guide: AssignRecords\(\)](#)

Plot Any Salesforce Data on the Map

Visualize record data for objects that rely on addresses from a related object in Salesforce Maps. For example, your reps work with consumer goods and want to plot visit records, but the records don't include addresses. To get visit records to appear on the map, set up your Visit base object to include address fields from Retail Store or other related objects.

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

How: From the base object for the records that your reps want to plot on the map, select the address location field such as **PlaceID**. Then select the related object from which you want to specify the address fields such as **Address**.

Select the address fields that you want to plot on the map from the related object.

SEE ALSO:

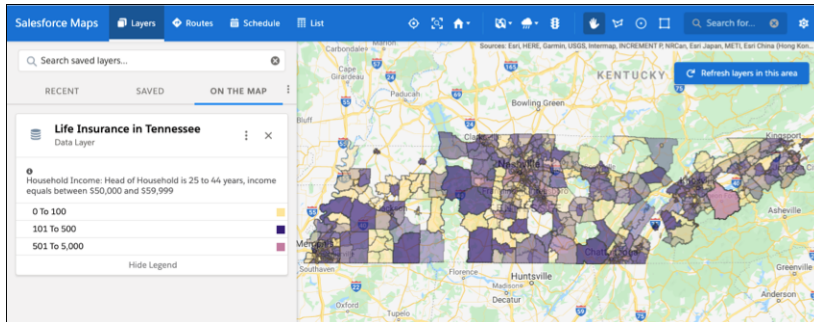
[Salesforce Help: Plot Any Salesforce Data on the Map \(can be outdated or unavailable during release preview\)](#)

Identify Potential Customers Within Specific Markets

Encourage your reps to find new customers in untapped markets when they plot a data layer using the Demographic Context (USA) data source in Salesforce Maps. Sales and service reps create filters that narrow their focus to a specific population or location. Then your reps apply styling for visualizing categories that can present promising business opportunities.

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

How: When your reps create a data layer, they select Demographic Context (USA) as the data source. Filters and styling help your reps focus on key topics. For example, your reps can apply a filter for a specific state, then add categories for income ranges.



SEE ALSO:

[Salesforce Help: Identify Potential Customers Within Specific Markets \(can be outdated or unavailable during release preview\)](#)

Fill Gaps in Today's Schedule from a Desktop

Make the most of your reps' last-minute availability for more customer visits when you add stops to their current day's schedules. You can now optimize schedules that include ad hoc changes for the current day from a desktop in Salesforce Maps.

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

Salesforce Maps Territory Planning

Design territories for in-person and virtual customer visits. Gain insight on where to position sales and service resources when you visualize key attributes on a heat map. And export territory models, areas, containers, and units for proprietary and third-party territory management systems.

IN THIS SECTION:

[Optimize Areas for In-Person and Remote Business](#)

Design territories that include a mix of contiguous and noncontiguous areas in Salesforce Maps Territory Planning. Limit assignments within an area so that all your sales and service reps get opportunities to meet customers in person and virtually. Indicate whether to assign more or fewer units or containers to an area relative to others within the focus.

[Plan and Visualize Territories Using a Heat Map](#)

See how your territories align with an attribute that's relevant to your territory planning efforts in Salesforce Maps Territory Planning. For example, select annual revenue for accounts or order volumes that you import from proprietary or third-party systems. Heat maps give visual indications for where you can bolster or reduce coverage so that you meet and beat sales and service goals.

[Publish Territory Data for Other Systems](#)

Plan your territory models in Salesforce Maps Territory Planning and import them into proprietary and third-party systems. Choose which territory model data you publish to CSV files, which can include your territory model or specific areas, containers, and units.

[Create Territory Models from Salesforce or External Data Sources](#)

Start building alignments in Salesforce Maps Territory Planning using data sources that contribute to your data sets or territory models exported from other systems to CSV files. After you optimize your territory models, you can publish them to CSV files and import them into your proprietary or third-party territory management systems.

Fine-Tune Account Assignments in Salesforce Territory Models

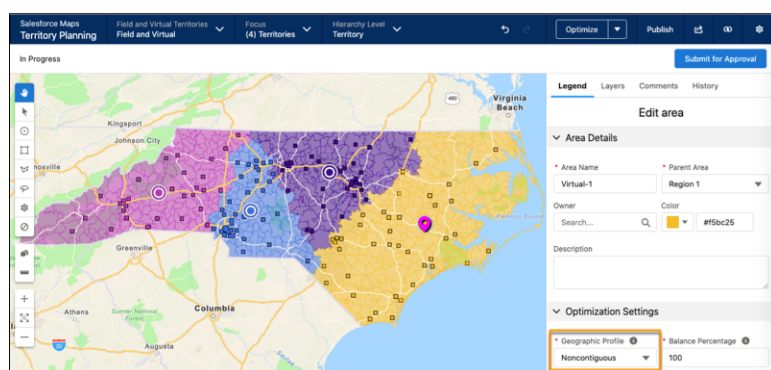
Create data sets that include assigned accounts in a territory model from Enterprise Territory Management. Using those data sets, create and optimize alignments in Salesforce Maps Territory Planning, then publish them as your fine-tuned territories in Salesforce.

Optimize Areas for In-Person and Remote Business

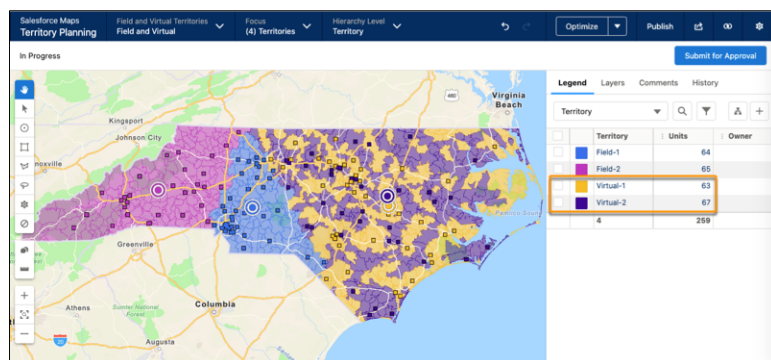
Design territories that include a mix of contiguous and noncontiguous areas in Salesforce Maps Territory Planning. Limit assignments within an area so that all your sales and service reps get opportunities to meet customers in person and virtually. Indicate whether to assign more or fewer units or containers to an area relative to others within the focus.

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

How: For example, you start with contiguous territories in North Carolina, but you want two noncontiguous territories for reps who sell remotely. So you select those territories and change their geographic profiles to **Noncontiguous**.



You then optimize the focus and see the results for your two noncontiguous territories: Virtual-1 and Virtual-2.



SEE ALSO:

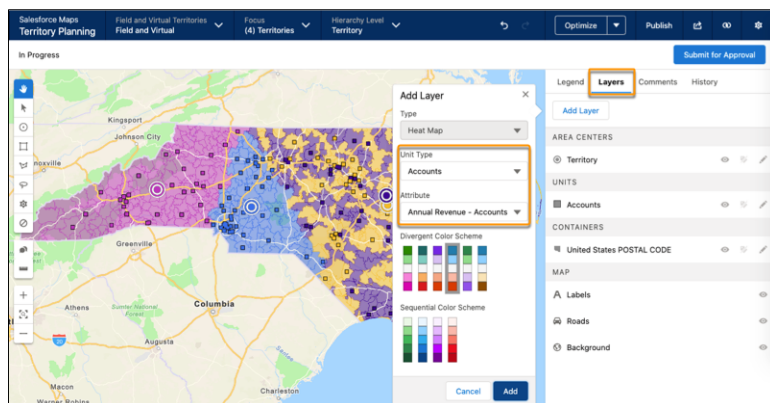
[Salesforce Help: Plan Territories for In-Person and Virtual Business \(can be outdated or unavailable during release preview\)](#)

Plan and Visualize Territories Using a Heat Map

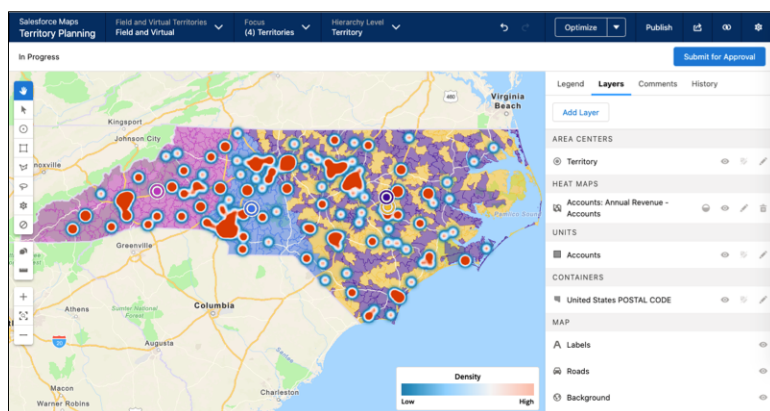
See how your territories align with an attribute that's relevant to your territory planning efforts in Salesforce Maps Territory Planning. For example, select annual revenue for accounts or order volumes that you import from proprietary or third-party systems. Heat maps give visual indications for where you can bolster or reduce coverage so that you meet and beat sales and service goals.

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

How: Select **Layers**, then define your heat map. For example, define your heat map to show hot spots that represent accounts with high annual revenue.



Add the layer to see hot spots that represent accounts with high annual revenue.



SEE ALSO:

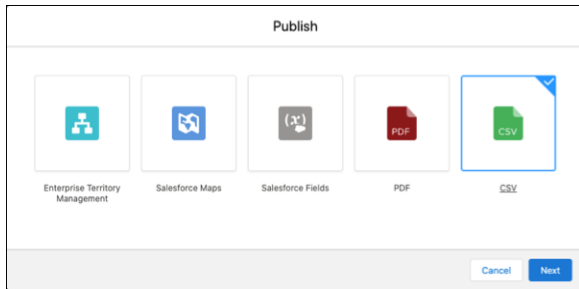
[Salesforce Help: Visualize Territories with a Heat Map Layer \(can be outdated or unavailable during release preview\)](#)

Publish Territory Data for Other Systems

Plan your territory models in Salesforce Maps Territory Planning and import them into proprietary and third-party systems. Choose which territory model data you publish to CSV files, which can include your territory model or specific areas, containers, and units.

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

How: When you publish an alignment or a focus, select **CSV**. Territory Planning creates CSV files that you then import to your territory planning systems.



SEE ALSO:

[Salesforce Help: Publish Territory Data to Use in Other Systems \(can be outdated or unavailable during release preview\)](#)

Create Territory Models from Salesforce or External Data Sources

Start building alignments in Salesforce Maps Territory Planning using data sources that contribute to your data sets or territory models exported from other systems to CSV files. After you optimize your territory models, you can publish them to CSV files and import them into your proprietary or third-party territory management systems.

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

How: When you create an alignment, select **Import Model**. To use a data source that contributes to your data set, select **Data Set**. To use a territory model exported from another system, select **CSV**. Before importing a CSV file, ensure that the parent value is blank for your top-level territories. Select your data source or CSV file that includes your territory model data, then work through the required fields.

Create Alignment

Let's set the Territory Model for this Alignment
Territory model supports a maximum of 10 levels.
Don't worry if it isn't perfect, you'll be able to make changes at a later time.

Import From

- ☐ Alignment
- ☐ Salesforce Territory Model
- ☐ Data Set
- ☒ CSV

Import Model

Cancel **Next**

Territory Model Root

Previous

Create Alignment

Let's set the Territory Model for this Alignment
Territory model supports a maximum of 10 levels.
Don't worry if it isn't perfect, you'll be able to make changes at a later time.

Import From

CSV File

model - us.csv

Area Column

Area

Parent Column

Parent

Import

Cancel **Next**

Territory Model Root

Previous

The territory model appears. You can now assign owners and refine your model on the map.

Create Alignment

Let's set the Territory Model for this Alignment
Territory model supports a maximum of 10 levels.
Don't worry if it isn't perfect, you'll be able to make changes at a later time.

Populate Sample **Import Model**

Level 1	Level 2	Level 3
Territory Model Root	North Central Region	Aurora District
		Aurora
		Chicago 1
		Chicago 2
		Davenport
		Elgin
		Green Bay

Previous **Cancel** **Next**

SEE ALSO:

[Salesforce Help: Create Alignments from a Data Set's Source](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Alignments from External Territory Model Data](#) (can be outdated or unavailable during release preview)

Fine-Tune Account Assignments in Salesforce Territory Models

Create data sets that include assigned accounts in a territory model from Enterprise Territory Management. Using those data sets, create and optimize alignments in Salesforce Maps Territory Planning, then publish them as your fine-tuned territories in Salesforce.

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

How: When you create a data set, select **Build Territory Model Query**. Give it a name and select the fields you want to include in your data set. Then select the model from Enterprise Territory Management.

Build Territory Model Query

Query Name: Assigned Accounts from Enterprise Territory Management

Fields: Account ID, Account Name, Annual Revenue, Billing Latitude, Billing Longitude

Territory: Field Sales 2020 > Health - US > Midwest Region > Austin District > Austin > Beaumont

SQL query: SELECT Objectid, TYPEOF Object WHEN Account THEN Id, BillingLatitude, BillingLongitude, AnnualRevenue, Name END, Territory2Id, Territory2.Name FROM ObjectTerritory2Association WHERE Territory2Id IN ('0M14x000000wsLNGAY';'0M14x000000wsLSGAY';'0M14x000000wsLYGAY';'0M14x000000wsLsGAI';'0M14x000000wsLIGAI')

Buttons: Previous, Cancel, Save

As you select options, you build the query, which you can test before you save it.

SEE ALSO:

[Salesforce Help: Fine-Tune Account Assignments in Enterprise Territory Management Models](#) (can be outdated or unavailable during release preview)

Salesforce Maps Live Tracking

Keep drivers focused on their trips and streamline their reporting responsibilities. Capture work-related miles in drive trip records using your drivers' iOS mobile devices—all in the Salesforce mobile app.

IN THIS SECTION:

[Automate Driver Location and Metrics Reporting](#)

Save your drivers the hassle of using multiple mobile apps to report their whereabouts, delays, and availability, and to update Salesforce records. When drivers turn on Live Tracking in the Salesforce mobile app for iOS, you get insight into their location and trip-related data. Shorten drive times and resolve more service requests as you dispatch available drivers to nearby jobs.

Track Work-Related Miles Using Mobile Devices

Capture miles in drive trip records only when drivers have Salesforce Maps Live Tracking turned on in the Salesforce mobile app for iOS. Your reps can now pause mileage tracking during their breaks between stops. For vehicles with on-board sensors, drive trip records capture all miles even during breaks between stops.

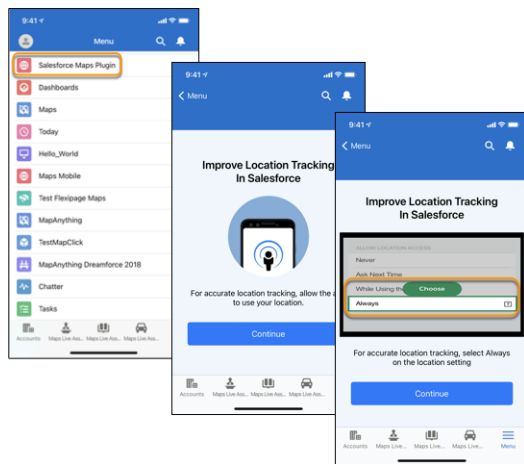
Automate Driver Location and Metrics Reporting

Save your drivers the hassle of using multiple mobile apps to report their whereabouts, delays, and availability, and to update Salesforce records. When drivers turn on Live Tracking in the Salesforce mobile app for iOS, you get insight into their location and trip-related data. Shorten drive times and resolve more service requests as you dispatch available drivers to nearby jobs.

Where: This change applies to Lightning Experience, Salesforce Classic, and mobile for iOS for Professional, Enterprise, Unlimited, and Developer editions.

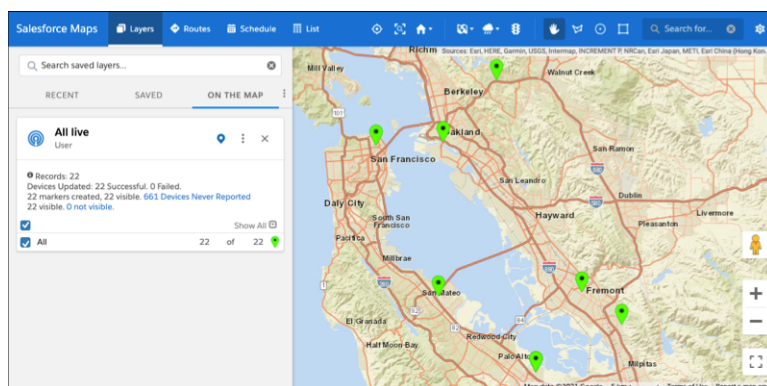
When: The Salesforce mobile app rolls out between October 11, 2021 and October 18, 2021.

How: Your drivers open the Salesforce mobile app on their iOS devices, then select **Salesforce Maps Live Tracking Plugin** from the app picker.

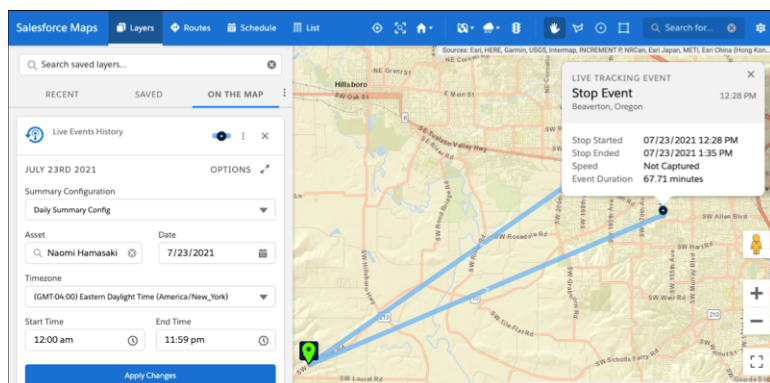


When drivers receive a prompt to share their location, tell them to select **Always**, which Live Tracking requires. This selection gives managers driver location and trip-related data even if drivers dismiss the Salesforce mobile app or run it in the background. But drivers can turn off Live Tracking, or set a time for automatic shutoff.

Managers see driver locations and other metrics when they plot Live Tracking layers on the map.



Event history shows metrics for defined time frames.



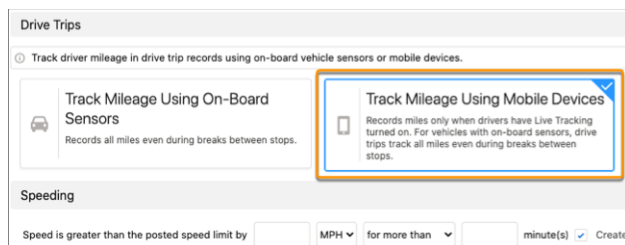
Track Work-Related Miles Using Mobile Devices

Capture miles in drive trip records only when drivers have Salesforce Maps Live Tracking turned on in the Salesforce mobile app for iOS. Your reps can now pause mileage tracking during their breaks between stops. For vehicles with on-board sensors, drive trip records capture all miles even during breaks between stops.

Where: This change applies to Lightning Experience, Salesforce Classic, and mobile for iOS for Professional, Enterprise, Unlimited, and Developer editions.

When: The Salesforce mobile app rolls out between October 11, 2021 and October 18, 2021.

How: When you create or change a daily summaries configuration, select **Track Mileage Using Mobile Devices**.



High Velocity Sales

Edit active sales cadences, test different email templates or call scripts on the same step, get detailed insights about sales cadence, call script, email template, and sales rep performance, add, remove, or pause targets from reports, and manage sales cadence targets using invocable actions.

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:

[Sales Cadences](#)

Edit active sales cadences and test different email templates or call scripts on the same step.

[See Sales Cadence and Sales Rep Performance at a Glance](#)

The High Velocity Sales Sample Dashboard lets sales managers see up to 17 key metrics such as email and call volume, engagement, and outcomes all in one place. Managers can drill into each dashboard component for details.

[Organize Sales Cadence Email Templates](#)

Sales teams can organize and share their email templates while using them in sales cadences. Templates in sales cadences no longer must reside in the Public Email Templates folder. Simply give your sales reps access to the shared folders containing the templates that they use in their sales cadences. Only templates in a user's Private Email Templates folder aren't sharable.

[Add and Remove Sales Cadence Targets from Reports](#)

Managers can use reports to segment and prioritize sales target groups and then update their sales cadence membership directly from the report.

[Send Sales Cadence Automated Emails as List Emails to Save Data](#)

Sales cadence automated email steps now send the message as a list email. With this change your sales managers can send large batches of automated emails without accumulating unneeded data that counts against your data limits. This change also allows more detailed email error reporting

[New and Changed Invocable Actions in High Velocity Sales](#)

Use the new and changed invocable actions for High Velocity Sales.

Sales Cadences

Edit active sales cadences and test different email templates or call scripts on the same step.

IN THIS SECTION:

[Edit Active Sales Cadences](#)

When sales managers want to improve a sales cadence, they can update active sales cadences without interrupting sales outreach. Managers can add and remove steps, update step names and descriptions, email template and call script variants, sales cadence rules, and more.

[Find Out Which Email Templates and Call Scripts Perform Best with Variant Testing](#)

Sales managers can use sales cadence steps to test different email templates or a call scripts to see which is most effective with prospects. The sales cadence sends each email or displays each call script according to the proportions that managers choose when building the sales cadence.

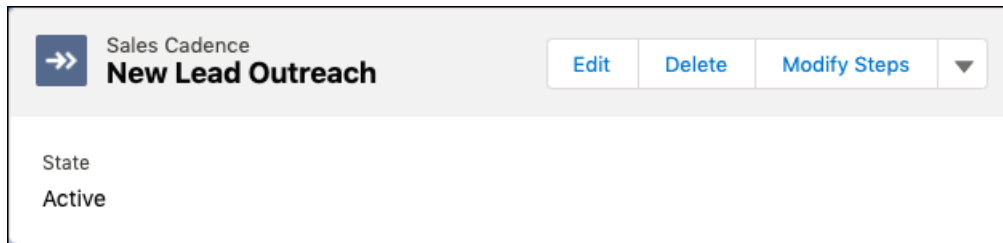
Edit Active Sales Cadences

When sales managers want to improve a sales cadence, they can update active sales cadences without interrupting sales outreach. Managers can add and remove steps, update step names and descriptions, email template and call script variants, sales cadence rules, and more.

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: On the sales cadence record page, click **Modify Steps**.



When deleting a call result or email listener step, managers can choose whether to delete the Yes or the No branch that follows it. Targets currently on deleted steps exit the sales cadence after completing the step. Changes aren't saved until you click **Update** in the Sales Cadence Builder. Closing the Sales Cadence Builder before clicking Update causes changes to be lost.


Find Out Which Email Templates and Call Scripts Perform Best with Variant Testing

Sales managers can use sales cadence steps to test different email templates or a call scripts to see which is most effective with prospects. The sales cadence sends each email or displays each call script according to the proportions that managers choose when building the sales cadence.


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: In High Velocity Sales Setup, turn on Allow Email Template and Call Script Variant Testing. When managers add an email or call step to a sales cadence, they can include up to three email templates or call scripts for the step. They can specify the percentage of targets that see or hear each variant.

 **Manual Email** [Cancel](#)

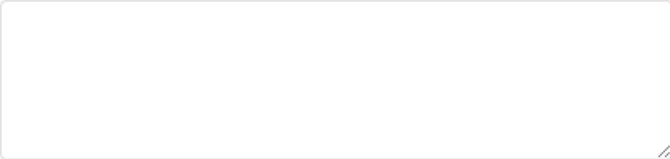
* Email Name
Manual email send

Email Templates Split 

 Day 1 Introduction v.1 	33%	
 Day 1 Introduction v.2 	33%	
 Day 1 Introduction v.3 	34%	

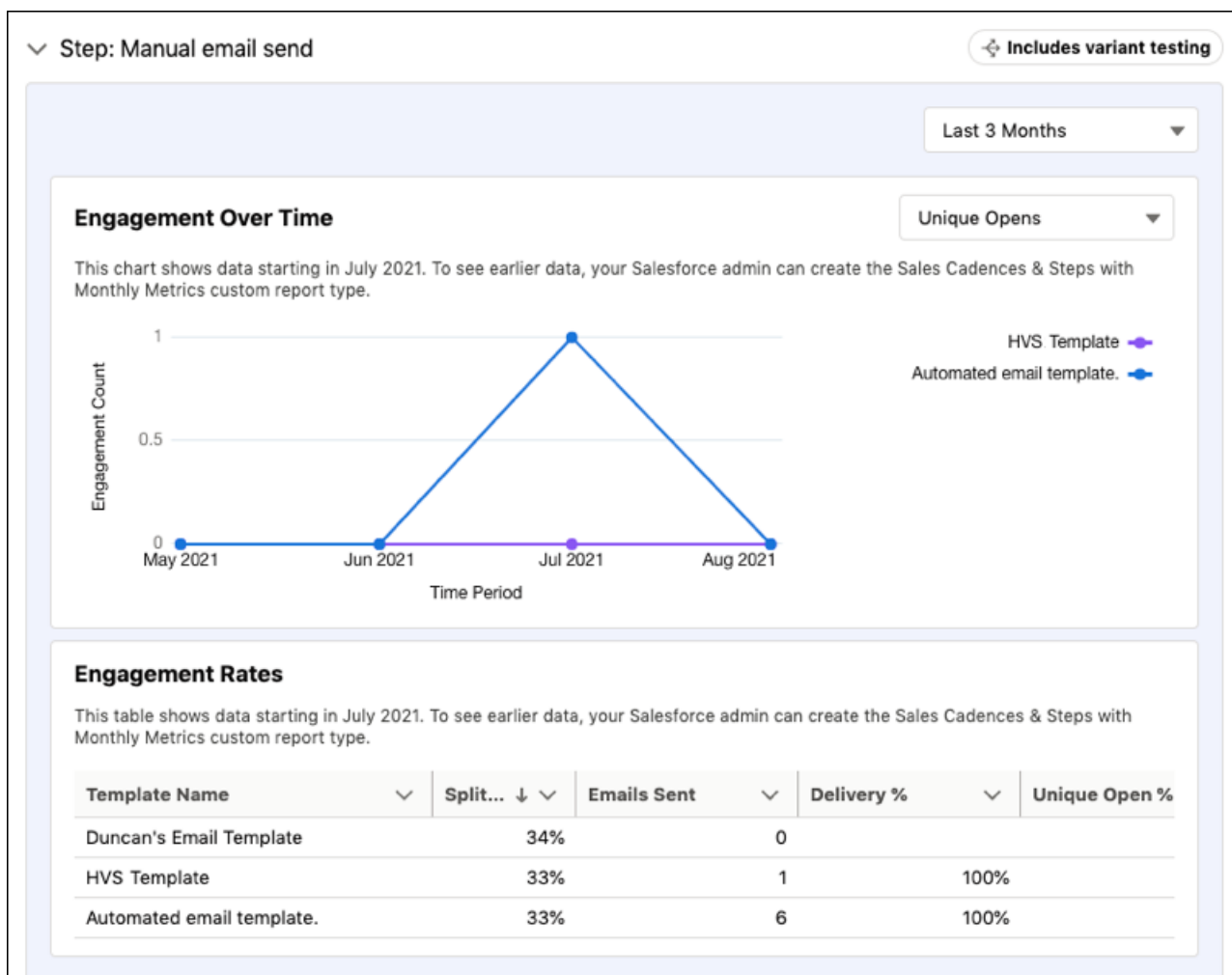
[Add Template Variant](#)

Description



[Save](#)

The Engagement tab on sales cadence records shows how much engagement each variant generates.



When managers see which version is most effective, they can update the percentages so that only the most effective variant is used.

See Sales Cadence and Sales Rep Performance at a Glance

The High Velocity Sales Sample Dashboard lets sales managers see up to 17 key metrics such as email and call volume, engagement, and outcomes all in one place. Managers can drill into each dashboard component for details.

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

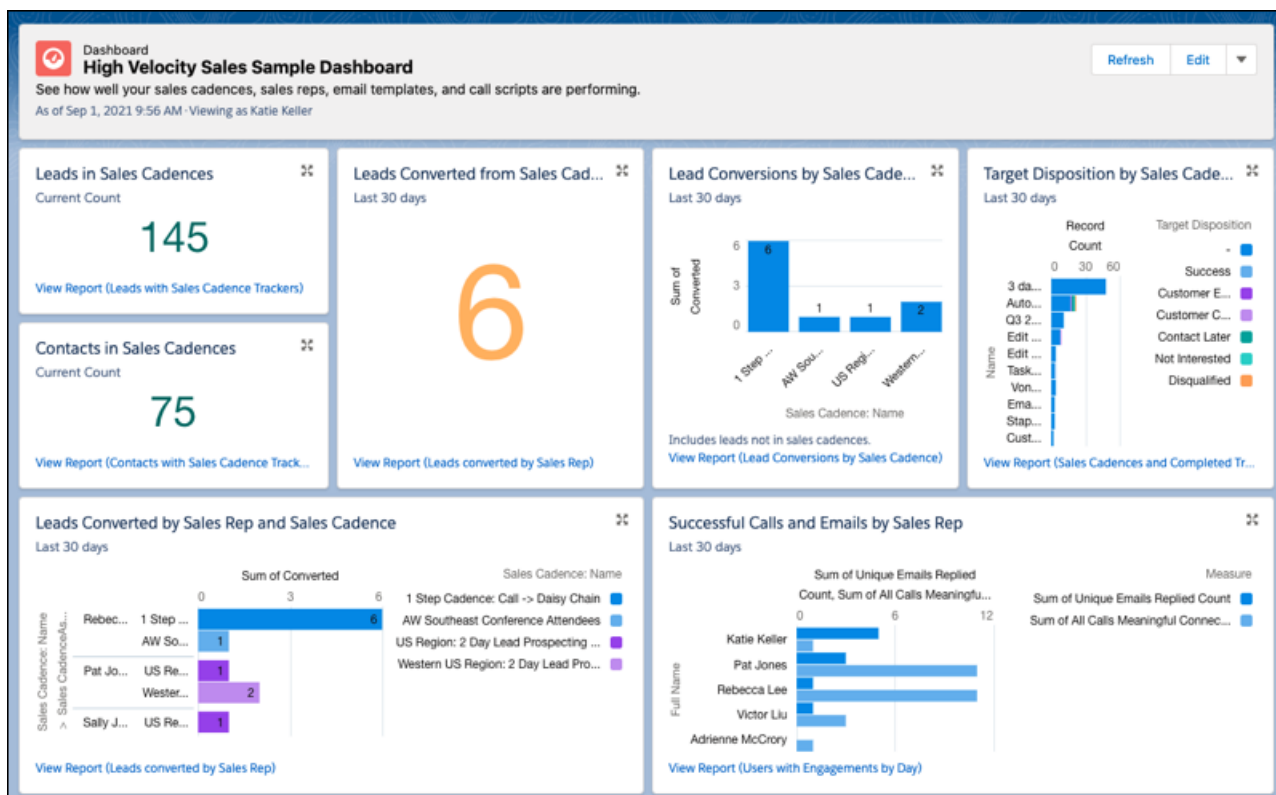
Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

Why: The dashboard is a great example of what's possible with High Velocity Sales reporting. Sales managers can add or delete components to meet their needs.

Here are a few examples of what the dashboard shows sales managers:

- Leads in Sales Cadences—How many leads are currently in sales cadences?
- Lead Conversions by Sales Cadence—Which sales cadences lead to the most lead conversions?
- Target Disposition by Sales Cadence—What are the most common outcomes for each sales cadence?
- Leads Converted by Sales Rep and Sales Cadence—For each sales rep, which sales cadence is helping them convert the most leads?
- Successful Calls and Emails by Sales Rep—How many successful call and email engagements did my reps achieve in the last 30 days?

- This Month's Most Engaged Leads: Email—Which of my leads have been most engaged with email this month?
- Most Engaged Sales Cadences—Which of my sales cadences have generated the most all-time engagement?
- Most Engaged Sales Cadence Steps—Which sales cadence steps have generated the most all-time engagement?



How: To view the dashboard in the High Velocity Sales app, choose **Dashboards** from the Navigation menu. Then choose the **High Velocity Sales Sample Dashboard**. You can also find the dashboard in the High Velocity Sales Sample Dashboards folder. The dashboard reports are in the High Velocity Sales Dashboard Reports folder.

If admins or managers want to edit the reports used by the dashboard, we recommend making copies of the reports and editing the copies. Any changes to the underlying reports can cause the dashboard to stop working. The reports and dashboard components can also change in future releases.

The dashboard is a dynamic dashboard because it has the View As Dashboard User property, so it shows statistics based on records the user has access to. Each Salesforce org has a dynamic dashboards limit. If you've reached the limit, the dashboard isn't installed. You can try installing the dashboard again in High Velocity Sales Setup after reducing the number of dynamic dashboards you're using. For information about checking how many dynamic dashboards you're using, see the knowledge article titled [Find the Dynamic Dashboards in my Organization](#).

Organize Sales Cadence Email Templates

Sales teams can organize and share their email templates while using them in sales cadences. Templates in sales cadences no longer must reside in the Public Email Templates folder. Simply give your sales reps access to the shared folders containing the templates that they use in their sales cadences. Only templates in a user's Private Email Templates folder aren't sharable.

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.

Add and Remove Sales Cadence Targets from Reports

Managers can use reports to segment and prioritize sales target groups and then update their sales cadence membership directly from the report.

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

Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

How: Use any lead, contact, or person account report to identify a group of targets. Then click **Add to Sales Cadence** or **Remove from Sales Cadence**. Managers can add or remove up to 200 targets at a time.

Send Sales Cadence Automated Emails as List Emails to Save Data

Sales cadence automated email steps now send the message as a list email. With this change your sales managers can send large batches of automated emails without accumulating unneeded data that counts against your data limits. This change also allows more detailed email error reporting.

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

Who: This feature is available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission and the Allow Sending of List Emails permission.

How: Sending automated emails as list emails creates just a single list email record for all emails sent from an automated email step on the same day. When an automated email step uses variant testing, the system creates one list email record per day for each combination of user, step, and email template. When a user changes their sending email address, the system creates a separate list email record for subsequent emails. The Salesforce list email framework also provides finer error detection so that you can troubleshoot any problems faster. To see email and other sales cadence step errors and statistics, add the new Current Sales Cadence Step: Error Code field to Action Cadence Step Tracker reports.

SEE ALSO:

[Use List Emails for Sales Cadence Automated Emails Automatically](#)

New and Changed Invocable Actions in High Velocity Sales

Use the new and changed invocable actions for High Velocity Sales.

Add a target to a sales cadence

Use the new `assignTargetToSalesCadence` action.

Remove a target from a sales cadence

Use the new `removeTargetFromSalesCadence` action.

Pause a target in a sales cadence

Use the new `pauseSalesCadenceTracker` action.

Resume a target in a sales cadence

Use the new `resumeSalesCadenceTracker` action.

Change a sales cadence target assignee

Use the new `changeSalesCadenceTargetAssignee` action.

Modify a sales cadence target's attributes

Use the new `modifyCadenceTrackerAttributes` action.

Skip or manually complete a sales cadence step

Use the new `sendSalesCadenceEvent` action.

Retrieve the email template or call script for email or call steps that use variant testing

Use the new `selectTemplateForSalesCadenceStepTracker` action.

Integration with Google

Get improvements to event logging from Google calendar. For Salesforce Inbox users, manually log emails when in an Einstein Activity Capture configuration with emails turned off.

IN THIS SECTION:

[Gmail Integration](#)

Select all contacts automatically and capture attendees when logging events. Manually log emails from the integration for Salesforce Inbox users in an Einstein Activity Capture configuration with emails turned off. Support for older versions of Chrome is ending.

[Lightning Sync for Google](#)

Check out what's new with Einstein Activity Capture.

Gmail Integration

Select all contacts automatically and capture attendees when logging events. Manually log emails from the integration for Salesforce Inbox users in an Einstein Activity Capture configuration with emails turned off. Support for older versions of Chrome is ending.

IN THIS SECTION:

[Get Improved Event Logging in the Gmail Integration](#)

If Salesforce is set up for shared activities, matching contact records shown when logging an event from Gmail are automatically selected. If there are no matching contacts, the first matching lead is automatically selected. Also, all the attendees on the manually logged event are now captured in the Salesforce event record.

[Log Emails Manually from the Gmail Integration with Inbox When Einstein Activity Capture Is On](#)

Salesforce Inbox users who are part of an Einstein Activity Capture configuration that has email capture disabled can now manually log emails from Gmail. This change allows users to benefit from the event and contact portions of Einstein Activity Capture and still manually log the emails that they need.

[Simplified Multi-Factor Authentication in the Gmail Integration](#)

Sales reps set up for single sign-on (SSO) and assigned the Multi-Factor Authentication for User Interface Logins permission are no longer required to enter multi-factor challenges in the Gmail integration. This change applies if the Keep Salesforce and Gmail Connected setting is on in Gmail integration setup. This change doesn't apply to users that are set up to require username and passwords or for high assurance session security multi-factor authentication.

[Support for the Gmail Integration in Older Versions of Google Chrome Is Ending](#)

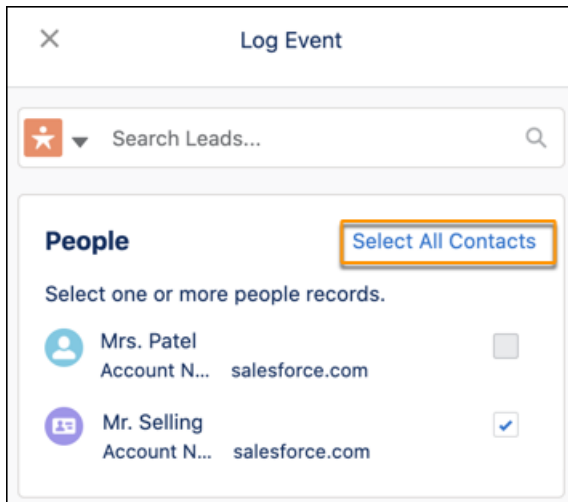
Starting in Winter '22, the Gmail integration and Gmail integration with Inbox require Google Chrome version 88 or later. Changes to the Google Chrome extensions platform require sales reps using Chrome version 87 and earlier to upgrade Chrome to continue to use the integration. To ensure that you have the latest security enhancements, we recommend updating to the latest version available.

Get Improved Event Logging in the Gmail Integration

If Salesforce is set up for shared activities, matching contact records shown when logging an event from Gmail are automatically selected. If there are no matching contacts, the first matching lead is automatically selected. Also, all the attendees on the manually logged event are now captured in the Salesforce event record.

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

How: Make sure that **Allow Users to Relate Multiple Contacts to Tasks and Events** in Activity Settings is enabled in Salesforce setup. Then, when a rep logs an event from Gmail, the contacts that appear in the related record are automatically selected. Reps can log an event to up to 50 contacts or one lead. The integration only shows the first 15 matching records in the order the attendees appear on the event. If there are no matching contacts in the first 15 records, the first lead record is automatically selected for logging. Reps can deselect all contacts or deselect individual contacts before logging the event. Reps can also search for other contacts to log the event to.



Logging events to internal users isn't supported. If the attendee list includes matching users in the first 15 records, reps see the users listed but can't select them for logging.

To include all attendees from an invitation on the Salesforce event record, make sure that the Attendees field is available on your page layouts for the Event object in Salesforce. Then, when reps log an event, all the attendees, including internal users, are listed on the event record. The attendee's RSVP status isn't shown.



Note: In Salesforce Classic, all attendees are captured in the Hasn't Responded list on the event record. That list is available by default.

SEE ALSO:

[Salesforce Help: Set Up Event Logging from Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Logging Events from Outlook and Gmail to Salesforce \(can be outdated or unavailable during release preview\)](#)

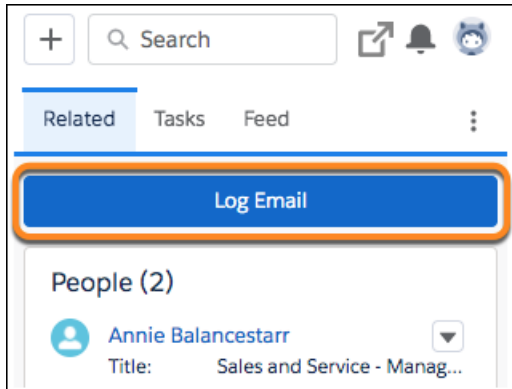
[Salesforce Help: Enable Shared Activities \(can be outdated or unavailable during release preview\)](#)

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

Salesforce Inbox users who are part of an Einstein Activity Capture configuration that has email capture disabled can now manually log emails from Gmail. This change allows users to benefit from the event and contact portions of Einstein Activity Capture and still manually log the emails that they need.

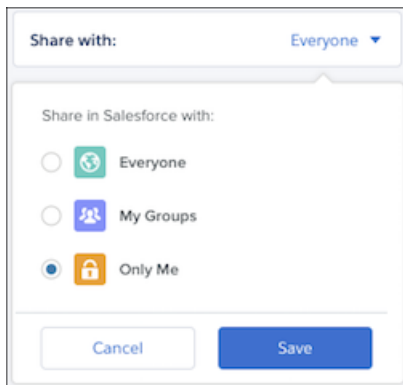
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: If an Inbox user is part of an Einstein Activity Capture configuration that has emails disabled, they have the option to log an email from the integration in Gmail.



The process to log an email is the same for Inbox and regular Gmail integration users.

If an Inbox user is part of an Einstein Activity Capture configuration that has emails enabled, their emails are captured and logged to Salesforce automatically. Those users still see the sharing options available for their Einstein Activity Capture configuration.



SEE ALSO:

[Include Salesforce Inbox Users in Any Einstein Activity Capture Configuration](#)

[Salesforce Help: Select Who Can Use Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Simplified Multi-Factor Authentication in the Gmail Integration

Sales reps set up for single sign-on (SSO) and assigned the Multi-Factor Authentication for User Interface Logins permission are no longer required to enter multi-factor challenges in the Gmail integration. This change applies if the Keep Salesforce and Gmail Connected setting is on in Gmail integration setup. This change doesn't apply to users that are set up to require username and passwords or for high assurance session security multi-factor authentication.

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

Why: By default, users who log in to Salesforce through an authentication provider that supports single sign-on (SSO) are no longer challenged with multi-factor authentication requests. The Gmail integration supports SSO.

How: This change applies to new orgs in Winter '22 automatically. For existing orgs, contact Salesforce Customer Support and ask to enable suppressing MFA challenges for users in an OIDC-SSO flow.

SEE ALSO:

[MFA Challenges for Authentication Provider Single Sign-On Logins Are No Longer Enforced](#)

Support for the Gmail Integration in Older Versions of Google Chrome Is Ending

Starting in Winter '22, the Gmail integration and Gmail integration with Inbox require Google Chrome version 88 or later. Changes to the Google Chrome extensions platform require sales reps using Chrome version 87 and earlier to upgrade Chrome to continue to use the integration. To ensure that you have the latest security enhancements, we recommend updating to the latest version available.

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

Why: The integration with Gmail uses the Google Chrome extensions platform. As Google updates that platform with security, privacy, and performance enhancements, we also update the Gmail integration to use the latest platform. Sometimes these updates require an upgrade to continue using the integration.

SEE ALSO:

[Salesforce Help: Gmail Integration System Requirements \(can be outdated or unavailable during release preview\)](#)

[External Link: Update Google Chrome](#)

Lightning Sync for Google

Check out what's new with Einstein Activity Capture.

IN THIS SECTION:

[Check Out Einstein Activity Capture Improvements for Google Customers](#)

If you're a new Salesforce customer who wants to sync contacts or events with your Google account, Einstein Activity Capture is now the go-to product for you. Or if you're a current Lightning Sync user who's considering the move to Einstein Activity Capture, check out what's new. For example, Salesforce Inbox users that are part of an Einstein Activity Capture configuration with emails disabled can manually log emails from the Gmail integration. Plus, admins can now add Inbox users to configurations that include any Einstein Activity Capture settings.

Check Out Einstein Activity Capture Improvements for Google Customers

If you're a new Salesforce customer who wants to sync contacts or events with your Google account, Einstein Activity Capture is now the go-to product for you. Or if you're a current Lightning Sync user who's considering the move to Einstein Activity Capture, check out what's new. For example, Salesforce Inbox users that are part of an Einstein Activity Capture configuration with emails disabled can manually log emails from the Gmail integration. Plus, admins can now add Inbox users to configurations that include any Einstein Activity Capture settings.

Where: Lightning Sync and Einstein Activity Capture are available in various editions.

SEE ALSO:

[Einstein Activity Capture](#)

[Knowledge Article: Lightning Sync: Not Available for New Customers as of Winter '21 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Compare Einstein Activity Capture and Lightning Sync \(can be outdated or unavailable during release preview\)](#)

Integration with Microsoft

Get improvements to event logging from Outlook. For Salesforce Inbox users, manually log emails when in an Einstein Activity Capture configuration with emails turned off. If you're ready to migrate from Lightning Sync to Einstein Activity Capture, the migration assistant can help you do it quickly and easily. And if you're still on Salesforce for Outlook, remember that the full product retirement is scheduled for June 2023.

IN THIS SECTION:

[Outlook Integration](#)

Select all contacts automatically and capture attendees when logging events. Manually log emails from the integration for Salesforce Inbox users in an Einstein Activity Capture configuration with emails turned off.

[Lightning Sync for Microsoft Exchange](#)

Let Salesforce make the move to Einstein Activity Capture for you. Check out what's new for Einstein Activity Capture and how you can move quickly and easily using the Lightning Sync migration assistant.

[Salesforce for Outlook](#)

Salesforce for Outlook is still scheduled for product retirement in June 2023. In the meantime, if you need version-specific Salesforce for Outlook release notes, you can find them in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

Outlook Integration

Select all contacts automatically and capture attendees when logging events. Manually log emails from the integration for Salesforce Inbox users in an Einstein Activity Capture configuration with emails turned off.

IN THIS SECTION:

[Get Improved Event Logging in the Outlook Integration](#)

If Salesforce is set up for shared activities, matching contact records shown when logging an event from Outlook are automatically selected. If there are no matching contacts, the first matching lead is automatically selected. Plus, all the attendees on the manually logged event are now captured in the Salesforce event record.

[Log Emails Manually from the Outlook Integration with Inbox When Einstein Activity Capture Is On](#)

Salesforce Inbox users that are part of an Einstein Activity Capture configuration that has email capture disabled can now manually log emails from Outlook. This change allows users to benefit from the event and contact portions of Einstein Activity Capture and still manually log the emails that they need.

[Simplified Multi-Factor Authentication in the Outlook Integration](#)

Sales reps set up for single sign-on (SSO) and assigned the Multi-Factor Authentication for User Interface Logins permission are no longer required to enter multi-factor challenges in the Outlook integration. This change doesn't apply to users that are set up to require username and passwords or for high assurance session security multi-factor authentication.

[Support for the Outlook Integration in Older Versions of Outlook and Windows Is Ending](#)

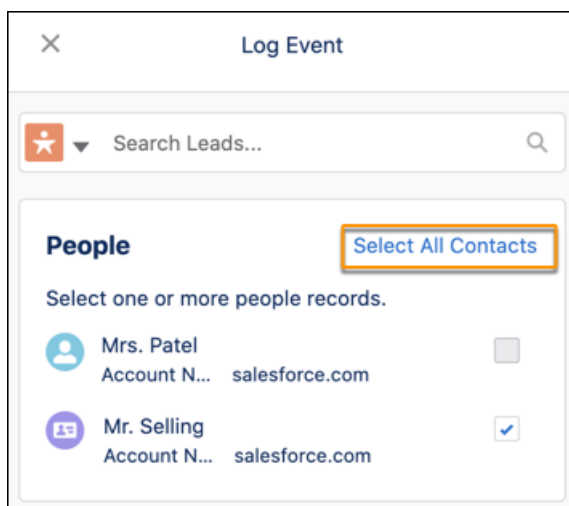
Support for running the Outlook integration in Outlook 2013, Outlook 2016, and volume-licensed versions of Outlook 2019 ends December 31, 2022. For product support after that date, you need Office version 16.0.11629 or later and Windows 10 versions 1903 or later. You can continue to use the Outlook integration after the end of December 2022. After that date, Salesforce no longer provides support and bug fixes and doesn't guarantee new features in the older Outlook versions.

Get Improved Event Logging in the Outlook Integration

If Salesforce is set up for shared activities, matching contact records shown when logging an event from Outlook are automatically selected. If there are no matching contacts, the first matching lead is automatically selected. Plus, all the attendees on the manually logged event are now captured in the Salesforce event record.


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

How: Make sure that **Allow Users to Relate Multiple Contacts to Tasks and Events** in Activity Settings is enabled in Salesforce setup. Then, when a rep logs an event from Outlook, the contacts that appear in the related record are automatically selected. Reps can log an event to up to 50 contacts or one lead. The integration only shows the first 15 matching records in the order the attendees appear on the event. If there are no matching contacts in the first 15 records, the first lead record is automatically selected for logging. Reps can deselect all contacts or deselect individual contacts before logging the event. Reps can also search for other contacts to log the event to.



Logging events to internal users isn't supported. If the attendee list includes matching users in the first 15 records, reps see the users listed but can't select them for logging.

To include all attendees from an invitation on the Salesforce event record, make sure that the Attendees field is available on your page layouts for the Event object in Salesforce. Then, when reps log an event, all the attendees on the event, including internal users, are listed on the event record. The attendee's RSVP status isn't shown.

 **Note:** In Salesforce Classic, all attendees are captured in the Hasn't Responded list on the event record. That list is available by default.

SEE ALSO:

[Salesforce Help: Set Up Event Logging from Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Logging Events from Outlook and Gmail to Salesforce \(can be outdated or unavailable during release preview\)](#)

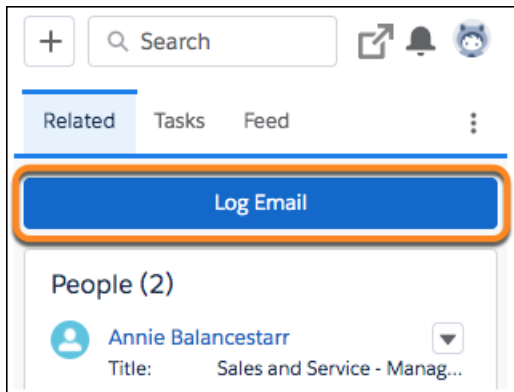
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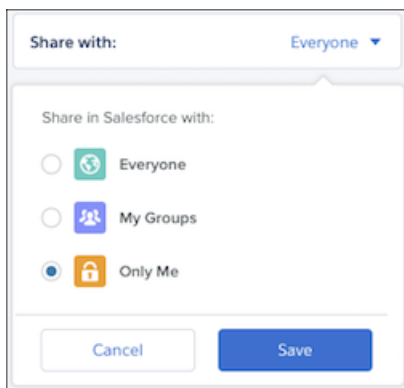
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How: If an Inbox user is part of an Einstein Activity Capture configuration that has emails disabled, they have the option to log an email from the integration in Outlook.



The process to log an email is the same for Inbox and regular Outlook integration users.

If an Inbox user is part of an Einstein Activity Capture configuration that has emails enabled, their emails are captured and logged to Salesforce automatically. Those users still see the sharing options available for their Einstein Activity Capture configuration.



SEE ALSO:

[Include Salesforce Inbox Users in Any Einstein Activity Capture Configuration](#)

[Salesforce Help: Select Who Can Use Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

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Sales reps set up for single sign-on (SSO) and assigned the Multi-Factor Authentication for User Interface Logins permission are no longer required to enter multi-factor challenges in the Outlook integration. This change doesn't apply to users that are set up to require username and passwords or for high assurance session security multi-factor authentication.

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

Why: By default, users who log in to Salesforce through an authentication provider that supports single sign-on (SSO) are no longer challenged with multi-factor authentication requests. The Outlook integration supports SSO.

How: This change applies to new orgs in Winter '22 automatically. For existing orgs, contact Salesforce Customer Support and ask to enable suppressing MFA challenges for users in an OIDC-SSO flow.

SEE ALSO:

[MFA Challenges for Authentication Provider Single Sign-On Logins Are No Longer Enforced](#)

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, 2022. For product support after that date, you need Office version 16.0.11629 or later and Windows 10 versions 1903 or later. You can continue to use the Outlook integration after the end of December 2022. After that date, Salesforce no longer provides support and bug fixes and doesn't guarantee new features in the older Outlook versions.

Where: This change applies to the Outlook integration, formerly known as Lightning for Outlook, in all editions, for users running 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 support of the Outlook integration after December 2022, 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

Let Salesforce make the move to Einstein Activity Capture for you. Check out what's new for Einstein Activity Capture and how you can move quickly and easily using the Lightning Sync migration assistant.

IN THIS SECTION:

[Move to Einstein Activity Capture Easily](#)

Considering the move to Einstein Activity Capture? The Lightning Sync migration assistant is here to help! The assistant tells you whether you're ready, prepares you to manage product differences, then moves your settings from Lightning Sync to Einstein Activity Capture. The assistant is so fast and easy, your users barely even notice the change.

[Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers](#)

If you're a new Salesforce customer who wants to sync contacts or events with your Microsoft account, Einstein Activity Capture is now the go-to product for you. Or if you're a current Lightning Sync user who's considering the move to Einstein Activity Capture, check out what's new. For example, Salesforce Inbox users that are part of an Einstein Activity Capture configuration with emails disabled can manually log emails from the Outlook integration. Plus, admins can now add Inbox users to configurations that include any Einstein Activity Capture settings.

Move to Einstein Activity Capture Easily

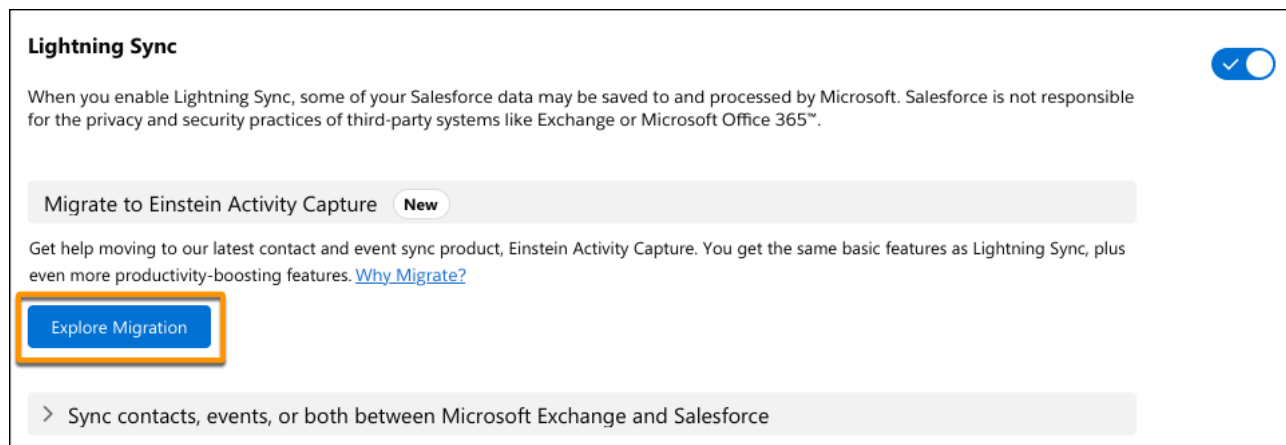
Considering the move to Einstein Activity Capture? The Lightning Sync migration assistant is here to help! The assistant tells you whether you're ready, prepares you to manage product differences, then moves your settings from Lightning Sync to Einstein Activity Capture. The assistant is so fast and easy, your users barely even notice the change.

Where: Lightning Sync and Einstein Activity Capture are available in various editions.

Who: Most Lightning Sync for Microsoft Exchange customers can use the migration assistant to move to Einstein Activity Capture, but there are some limitations.

How: Kick off the migration assistant from the Outlook Integration and Sync page in Setup. If the migration assistant is supported for you, under the Lightning Sync section, you see a new section called Migrate to Einstein Activity Capture.

To get resources that prepare you for the process, click **Explore Migration**.



And when you're ready to move forward, the migration assistant steps you through the process. Follow along, and then later you can obtain and assign the appropriate user permissions to get your sales reps using Einstein Activity Capture.

SEE ALSO:

[Salesforce Help: Compare Einstein Activity Capture and Lightning Sync \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Move from Lightning Sync to Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

[Learn About Migrating to Einstein Activity Capture](#)

Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers

If you're a new Salesforce customer who wants to sync contacts or events with your Microsoft account, Einstein Activity Capture is now the go-to product for you. Or if you're a current Lightning Sync user who's considering the move to Einstein Activity Capture, check out what's new. For example, Salesforce Inbox users that are part of an Einstein Activity Capture configuration with emails disabled can manually log emails from the Outlook integration. Plus, admins can now add Inbox users to configurations that include any Einstein Activity Capture settings.

Where: Lightning Sync and Einstein Activity Capture are available in various editions.

SEE ALSO:

[Einstein Activity Capture](#)

[Knowledge Article: Lightning Sync: Not Available for New Customers as of Winter '21 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Compare Einstein Activity Capture and Lightning Sync \(can be outdated or unavailable during release preview\)](#)

Salesforce for Outlook

Salesforce for Outlook is still scheduled for product retirement in June 2023. In the meantime, if you need version-specific Salesforce for Outlook release notes, you can find them in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

IN THIS SECTION:

[Salesforce for Outlook Is Being Retired in June 2023](#)

As previously announced, Salesforce for Outlook is scheduled for full product retirement in June 2023. For the latest in integration with Outlook, we recommend moving to our next generation products, the Outlook Integration and Einstein Activity Capture. Check out what's new for those products.

[Find Version-Specific Salesforce for Outlook Release Notes](#)

Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

Salesforce for Outlook Is Being Retired in June 2023

As previously announced, Salesforce for Outlook is scheduled for full product retirement in June 2023. For the latest in integration with Outlook, we recommend moving to our next generation products, the Outlook Integration and Einstein Activity Capture. Check out what's new for those products.

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

Why: After retirement, Salesforce for Outlook no longer syncs contacts, events, or tasks. And, the Salesforce for Outlook Side Panel doesn't connect to Salesforce, so sales reps can't work with their Salesforce records from Microsoft Outlook®.

How: To learn about Einstein Activity Capture and Outlook Integration improvements, see those release notes.

- [Outlook Integration](#)
- [Einstein Activity Capture](#)

To learn more about Salesforce for Outlook retirement and to compare replacement products, see [Salesforce for Outlook Retirement](#).

And for support during your transition to the latest products, check out the migration guide, [Move from Salesforce for Outlook to the Next-Generation Products](#).

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've made to improve usability.

IN THIS SECTION:

[Access to Pipeline Inspection Includes a System User, Profile, and Package](#)

When you get access to Pipeline Inspection, Salesforce adds a profile called Sales Insights Integration User and a user profile called Integration, Insights. Salesforce uses these entities to provide you with Einstein Deal Insights. If you update these entities, it can affect your ability to get insights. Integration users sometimes have full access to Accounts, Activities, and Opportunities. But these users don't modify your data or affect your Salesforce license usage. Einstein Deal Insights uses the Sales Insights package to create a secure connection between Salesforce data and sales intelligence infrastructure.

[Feedback Option for Einstein Email Insights Was Removed](#)

Sales reps can no longer submit feedback for email insights. So the thumbs-up and thumbs-down options were removed.

Access to Pipeline Inspection Includes a System User, Profile, and Package

When you get access to Pipeline Inspection, Salesforce adds a profile called Sales Insights Integration User and a user profile called Integration, Insights. Salesforce uses these entities to provide you with Einstein Deal Insights. If you update these entities, it can affect your ability to get insights. Integration users sometimes have full access to Accounts, Activities, and Opportunities. But these users don't modify your data or affect your Salesforce license usage. Einstein Deal Insights uses the Sales Insights package to create a secure connection between Salesforce data and sales intelligence infrastructure.

Where: This change applies to Sales Cloud in Lightning Experience in Unlimited edition.

Feedback Option for Einstein Email Insights Was Removed

Sales reps can no longer submit feedback for email insights. So the thumbs-up and thumbs-down options were removed.

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

SEE ALSO:

[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

Salesforce Anywhere (Quip)

Get the most out of your Salesforce data with Quip. Let your users choose where they work, stay in Quip with documents that autofill with Salesforce data and records created from Salesforce live apps, or work in Salesforce with the Template Library in Lightning Experience. Speed up your Quip setup with the New Document global quick action automatically added to all your global publisher layouts. Learn about the latest updates to Salesforce Anywhere Beta features.

IN THIS SECTION:

[When to Expect Salesforce Anywhere Features](#)

New Salesforce Anywhere features are coming soon.

[Create Documents from Templates from Anywhere](#)

Now your users can access their Template Library galleries, such as the Created by Me or company galleries, in Lightning Experience. Your users can create documents from templates and stay in Salesforce, making it easier to keep their free-form content and Salesforce data in context.

[Simplify Document Creation in Lightning Experience with New Document Global Action Improvements](#)

Now it's easier to add the New Document global action to your global publisher layouts. Your users can create a document wherever they are in Lightning Experience, link it to a record, and collaborate with their teams. They can add the things they know and love to their documents such as @mentions, Salesforce data mentions, and spreadsheets.

[Understand Who Can Access a Document with Synced Sharing Enhancements](#)

Your users can now see when others can access their documents linked to a Salesforce record. When a user links their document to a record, they can see what level of access Synced Sharing grants to other users. When Synced Sharing is enabled but users haven't connected their Salesforce org to Quip, they're now prompted to connect their org to view the linked document.

[Salesforce Anywhere Beta Is Being Retired](#)

Salesforce Anywhere Beta is scheduled for retirement on September 10, 2021.

[The Collaboration User Engagement Records Table Is Being Retired](#)

The `CollabUserEngmtRecordLink` object is deprecated, but you can extract the same information in Tableau CRM by linking existing tables. Previously, the Collaboration User Engagement Record table provided an association between Quip user engagement metrics and a Salesforce record.

[Share Your Live Apps with Selected Quip Sites](#)

Streamline your live apps distribution and maintenance by building a live app once and deploying it to multiple sites. Use the new Sites feature in the Live Apps Developer Console to share your company's live apps with other Quip sites. They can be your own managed sites or other companies' sites. If you're a Salesforce partner, you can share your live apps with multiple customers.

[Simplify Quip User Account Management with the New Bulk SCIM API Method](#)

Update or disable multiple Quip user accounts at the same time with the Bulk System for Cross-domain Identity Management (SCIM) API method. You can use this API method to fulfill your compliance and user-management service-level agreements (SLAs).

[Simplify Bulk Document Archiving with New Quip Admin API Methods](#)

Export multiple Quip threads such as documents or spreadsheets to PDF with the Create Bulk Export PDFs Request API method. You can also include the conversation history for each thread. Get your requested PDFs by calling the Retrieve Bulk Export PDF Response API method.

[Automate Information Sharing and Document Editing in Quip](#)

Use the Quip Automation API method to add rows to a Quip spreadsheet, export a Quip spreadsheet to PDF, and streamline your Quip document-editing process.

[Get Better Performance with the Quip Automation API](#)

Maximum limits have been applied to several Automation API inputs. Experience better performance when calling various Automation API methods.

[Get the Enhanced Salesforce Anywhere Experience](#)

Learn more about the 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
Section_ids output in the Edit a Document API method	Available now
Export Quip spreadsheets to PDF API	Available now
Improved Quip Automation API	October 2021
Add rows to a Quip spreadsheet with a Quip Automation API method	October 2021
Bulk document archiving with Quip Admin API methods	September 2021
Share live apps with selected Quip sites	September 2021
Bulk user account management with Quip SCIM API method	September 2021
New Document Global Action Improvements	Salesforce Preview
Synced Sharing Enhancements	When the release goes live for your org
Salesforce Anywhere Beta Retirement	September 10, 2021
Quip Engagement Metric Enhancements	October 2021
Access Template Library in Salesforce	September 2021
Use printer-friendly formatting for live data	November 2021
Updates to Quip Lightning component access for Admins logged in as other users	October 2021

Create Documents from Templates from Anywhere

Now your users can access their Template Library galleries, such as the Created by Me or company galleries, in Lightning Experience. Your users can create documents from templates and stay in Salesforce, making it easier to keep their free-form content and Salesforce data in context.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

How: From the Quip Documents component or Quip Associated Documents component, click **New from Template**.

Simplify Document Creation in Lightning Experience with New Document Global Action Improvements

Now it's easier to add the New Document global action to your global publisher layouts. Your users can create a document wherever they are in Lightning Experience, link it to a record, and collaborate with their teams. They can add the things they know and love to their documents such as @mentions, Salesforce data mentions, and spreadsheets.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

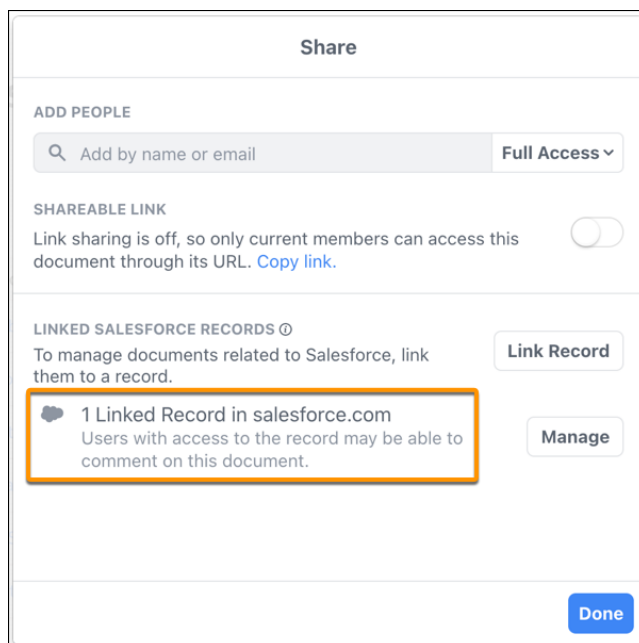
How: From Setup, in the Quick Find box, enter *Salesforce Anywhere (Quip)*. Under Create a Document from Anywhere, click **Add Global Action**. The New Document global quick action is automatically added to all global publisher layouts.

Understand Who Can Access a Document with Synced Sharing Enhancements

Your users can now see when others can access their documents linked to a Salesforce record. When a user links their document to a record, they can see what level of access Synced Sharing grants to other users. When Synced Sharing is enabled but users haven't connected their Salesforce org to Quip, they're now prompted to connect their org to view the linked document.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

How: To see the level of access that users have to a linked document when Synced Sharing is enabled, open the Share window.



Salesforce Anywhere Beta Is Being Retired

Salesforce Anywhere Beta is scheduled for retirement on September 10, 2021.

Where: This change applies to the Salesforce Anywhere mobile app for iOS in Professional, Enterprise, Unlimited, and Developer editions. It also applies to Setup for this feature in Lightning Experience. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

The Collaboration User Engagement Records Table Is Being Retired

The `CollabUserEngmntRecordLink` object is deprecated, but you can extract the same information in Tableau CRM by linking existing tables. Previously, the Collaboration User Engagement Record table provided an association between Quip user engagement metrics and a Salesforce record.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced.

How: To create the same association that `CollabUserEngmntRecordLink` provided, you can link a user engagements table to a document metrics records table.

SEE ALSO:

[Salesforce Help: Quip Engagement Metrics \(can be outdated or unavailable during release preview\)](#)

Share Your Live Apps with Selected Quip Sites

Streamline your live apps distribution and maintenance by building a live app once and deploying it to multiple sites. Use the new Sites feature in the Live Apps Developer Console to share your company's live apps with other Quip sites. They can be your own managed sites or other companies' sites. If you're a Salesforce partner, you can share your live apps with multiple customers.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus.

SEE ALSO:

[Live Apps Developer Documentation \(can be outdated or unavailable before September 2021\)](#)

Simplify Quip User Account Management with the New Bulk SCIM API Method

Update or disable multiple Quip user accounts at the same time with the Bulk System for Cross-domain Identity Management (SCIM) API method. You can use this API method to fulfill your compliance and user-management service-level agreements (SLAs).

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus. This API method is available in version 2 of the SCIM API.

SEE ALSO:

[SCIM API documentation \(can be outdated or unavailable before September 2021\)](#)

Simplify Bulk Document Archiving with New Quip Admin API Methods

Export multiple Quip threads such as documents or spreadsheets to PDF with the Create Bulk Export PDFs Request API method. You can also include the conversation history for each thread. Get your requested PDFs by calling the Retrieve Bulk Export PDF Response API method.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus.

Why: Use the Create Bulk Export PDFs Request API method to fulfill eDiscovery and other regulatory requirements and archive threads into other systems. You can also use one of your other systems to search all PDF thread data, including comments, and export the matching results.

SEE ALSO:

[Admin API Documentation \(can be outdated or unavailable before September 2021\)](#)

Automate Information Sharing and Document Editing in Quip

Use the Quip Automation API method to add rows to a Quip spreadsheet, export a Quip spreadsheet to PDF, and streamline your Quip document-editing process.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus.

Why: Get more functionality with these new and updated Quip API methods.

- Add Rows to Spreadsheet
 - Analyze and collaborate on data from multiple systems in a Quip spreadsheet.
 - Mix and match data from different sources and automatically add it to the same Quip spreadsheet whenever new data becomes available.
 - Work with a range of data types: support cases, event registrations, approved documents, survey results, or payments.
- Create Export PDF Request
 - Mark an approval cycle as complete, take a record-keeping snapshot, and share the PDF internally or with customers.
 - Request to export a Quip spreadsheet to PDF. Previously, you could only request PDFs of Quip documents using the Create Export PDF Request API method.
- Retrieve Export PDF Response
 - Get your requested PDF of a Quip spreadsheet after you call the Create Export PDF Request API method. Previously, you could only get PDFs of Quip documents using the Retrieve Export PDF Response API method.
- Edit a Document
 - Get the list of identifiers (section_ids) for new content that you just added to a Quip document. You can use a section_id to identify where you want to add new data when you make another API call. Previously, the section_ids field wasn't returned by the Edit a Document API method.

SEE ALSO:

[Automation API Documentation \(can be outdated or unavailable before October 2021\)](#)

Get Better Performance with the Quip Automation API

Maximum limits have been applied to several Automation API inputs. Experience better performance when calling various Automation API methods.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus.

Why: Calling some Automation API methods occasionally involves large inputs that can cause slow performance or errors. The maximum limits can prevent performance issues and errors when you call these Automation API methods.

API Methods	Inputs
<ul style="list-style-type: none"> Add People to a Thread or Add a Thread to Folders Copy a Document or Template Edit a Document Import a File Get Threads Create a Chat Room Create a Document, Spreadsheet or Slides Get Recent Threads Remove People from a Thread or Remove a Thread from Folders Get Recent Messages Add People to a Folder Create a Folder Get Users 	<ul style="list-style-type: none"> content count ids member_ids title

SEE ALSO:

[Automation API Documentation \(can be outdated or unavailable before October 2021\)](#)

Get the Enhanced Salesforce Anywhere Experience

Learn more about the new enhancements to Salesforce Anywhere.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce orgs with an existing Quip for Customer 360 plan or Salesforce Anywhere Advanced. This change also applies to users with Quip Plus.

Why: Salesforce Anywhere (Quip) features include these enhancements.

- When you use the Edit Quip Document action in Salesforce Flow or Process Builder to add content to a document, Quip by default adds an extra line after each paragraph. Now there's a checkbox to disable it and a new Flow API parameter, `Disable Extra Lines in Quip`.
- You can export a spreadsheet to a PDF. The Export Quip Document to PDF action for Salesforce Flow and Process Builder now includes the `Sheet Name` API parameter. Use `Sheet Name` to specify the name of the spreadsheet to export.

- To make reporting more accurate, Quip engagement metrics continue to be enhanced. And, automatic live app refreshes no longer count in document edit metrics.
- Your users can now open Tableau CRM dashboards from the Quip mobile app for iOS. Users can launch Tableau CRM for mobile from any dashboards embedded in their documents. They must be signed in to the Quip and Tableau CRM mobile apps with the same username and org.
- To make printed and exported documents more readable, your users can turn on printer-friendly formatting for all the live data in a document, including Salesforce Data Mentions.
- To find your templates more quickly, use search in the Template Library. You can search by title and narrow the search to a specific gallery.
- Salesforce Data Mentions now supports editing multi-select picklist and dependent picklist fields. Field dependencies are visually represented in the Edit Dependencies window.
- Admins who log in as other users can no longer view or connect with Quip Lightning components in Salesforce.

Salesforce CDP

The latest round of Salesforce CDP updates directly addresses customer feedback and unlocks access to new data sources, such as Commerce Cloud. Look out for a more accessible experience for mapping data and major improvements in Identity Resolution. There's also a new Salesforce Web SDK to unify website instrumentation across Salesforce CDP and Interaction Studio.

IN THIS SECTION:

[Create CRM Bundles with Data Kits from Your Salesforce CDP Data](#)

Streamline the CRM data bundle creation and set up experience for Salesforce CDP in a few clicks using Data Kits.

[Capture Event Updates on Calculated Insights, Identity Resolution, and Schema Changes](#)

Get the latest status change events of your Salesforce CDP schema, Calculated Insights, and Identity Resolution usage automatically. Admin users can use these events in Flow Builder to get notifications of when something errors out in order to investigate.

[Enjoy an Improved Identity Resolution Experience](#)

Identity Resolution has a new location directly in the main navigation of Salesforce CDP. Take advantage of all that identity resolution offers, such as creating rulesets and viewing details, alongside the rest of Salesforce CDP. The new location lets users who have the Data Aware Specialist permission access identity resolution and create unified profiles. Previously, only admin users had access to identity resolution because of its location in setup.

[Take Control of Unified Profiles with Match Rules](#)

Match rules for linking multiple records into unified profiles have more built-in functionality. Match rules now support custom fields, fuzzy match for first name, and normalized match of address, phone, and email contact points. Create match rules for rulesets based on the Individual entity in Identity Resolution.

[Create Better Unified Individuals with Multiple Individual Rulesets](#)

As part of Identity Resolutions, you can combine match rules and reconciliation rules together into a ruleset for the Individual entity to use throughout Salesforce CDP. You can create two rulesets with different configurations for the Individual entity to explore your data and create the best unified individuals for your use case. Use Data Explorer to compare the unified profiles created by the different match and reconciliation rules.

[Drive Actions from Salesforce CDP with Data Actions](#)

Create data actions based on the insights stored in Salesforce CDP to leverage streaming and cross-functional organization. Data Actions helps drive the actionability of the near real-time Insight. A Data Action containing a rich payload can be triggered based on certain conditions and can enable downstream systems to drive an action or orchestration.

[Download Datasets into Salesforce CDP to Use in Tableau Desktop](#)

Download selected entities in Salesforce CDP's data model along with their relationships with one click as a Tableau Data Source (TDS) file. Opening a TDS in Tableau Desktop eliminates the need to remodel CDP data in Tableau.

[Stream Data from Your Own External Sources using Ingestion API](#)

Use the Ingestion API, a REST API, to stream data from your external sources into Salesforce CDP. You can create a connector, upload your schema, and create data streams into your org. Using the API, you can stream data in incremental fashion or ingest in bulk.

[Connect to Mulesoft for a User-Friendly API Experience](#)

Use the power of Mulesoft and its robust ecosystem of data connectors to more easily bring your data into Salesforce CDP. Enrich existing Salesforce CDP records to automate data ingestion from third-party data sources.

[Map Your Data in Table View](#)

Switch between canvas view and table view when mapping your data. Table view provides a more accessible experience when connecting data source objects to data model objects.

[Draw Insights on Salesforce CDP Data Using Tableau CRM \(Beta\)](#)

Use Salesforce CDP data in Tableau CRM to run deep explorations on your unified customer data source without loading data or preparing it in Tableau CRM first. After setting up a live connection to Salesforce CDP, you can run queries on Salesforce CDP data associated with the connection in real time. You can also build dashboard charts and tables based on the queries that you run on this data.

[Connect Your B2C Commerce Data to Salesforce CDP](#)

You can connect one or more production B2C Commerce instances to Salesforce CDP with clicks, not code. The connector can bring in transactional order data with related product catalog and profile data. You can choose which B2C Commerce site data is brought into Salesforce CDP. For example, use enriched unified profiles with e Commerce order data to deliver more personalized cross-channel experiences.

[Salesforce Interactions Web SDK for Salesforce CDP and Interaction Studio](#)

A shared Web SDK across Salesforce CDP and Interaction Studio simplifies the configuration process for you. You can instrument the website one time and easily migrate from one product to the other. Additionally, we now support remote configuration through the sitemap. Load the sitemap in Salesforce CDP and update it at any time without the need to redeploy the website each time you must update tracking. With the sitemap you can update website tracking as your marketing strategy evolves.

[Get a Complete View of a Salesforce CDP Unified Individual with Profile Explorer](#)

With Profile Explorer in Salesforce CDP, you can view unified individual profiles. A Unified Individual profile shows data about Unified Individual fields, Contact points, Identity Resolution, Engagement, and Calculated Insights. Use the new Profile Explorer to search for Unified Individual profiles and view all the attached data.

[Create Streaming Insights in Real-Time](#)

Create metrics on streaming data coming from real-time data sources, such as website engagement or website clickstreams, to use real-time insights. Drive more value with insights by enabling cross-functional orchestration in Salesforce CDP. This release supports streaming engagement data from Web SDK, Mobile SDK, and Interaction Studio.

[Create Calculated Insights with Insight Builder](#)

Create metrics in Salesforce CDP using the intuitive UX tool, no SQL knowledge required.

[Simplify Calculated Insights Building with Metrics on Metrics](#)

Use metrics on metrics to build more comprehensive insights, such as engagement scores, customer health scores, and customer attribution scores. Organize complex Calculated Insights SQL data into logical steps and stitch powerful workflows. Metrics on metrics also allow you to improve metrics reuse for multiple use case scenarios.

[Create Smarter Segments with the Power of Einstein Engagement Scores](#)

Email Studio and MobilePush starter bundles automatically include Einstein Engagement Scores and make them available in the attribute library when building segments. Building segments based on these scores lets marketers target the most engaged users and suppress disengaged users for higher click-through rates, as well as create personalized and intelligent campaigns. Use the `EinsteinEmailEngagementScores` and `EinsteinMobileEngagementScores` objects in the attribute library to build your segments.

[Build Segments Based on Many-1-Many Relationships](#)

All Related objects are now supported in the attribute library for even more flexibility in building segments. We're now enabling objects under Many-to-1 to 1-to-Many relationships. For example, you can build a segment based on the many `ProductAttribute` object mapped to the one `Product` object, and the one `Product` object mapped to the many `SalesOrderProduct` object.

[Find Customers to Engage with Again](#)

Use the Greater Than Last Number of Days filter in segmentation to find customers who have previously completed a task. For example, build a segment of customers who have visited your website prior to 7 days ago, regardless of their activity in the past 7 days. Use this segment and send a targeted promotion to encourage them to come back.

[Complex Calculated Insights Functions Now Supported in Segmentation](#)

Segmentation now supports new complex Calculated Insights measures: non-numeric, such as text and date, and non-aggregatable, such as rank, bucket, and range. Navigate to the Segmentation tab in Salesforce CDP and create a segment using measures from Calculated Insights.

[Find Activations Easily in Marketing Cloud Shared Data Extensions](#)

To make it easier to manage all your Salesforce CDP activations across different platforms, each activation to Marketing Cloud now includes an automatically created unique ID. The ID includes the segment ID and activation ID from Salesforce CDP. The ID is visible in Marketing Cloud Shared Data Extensions to make searching and finding specific activations easier in Marketing Cloud.

[Activate to Commerce Cloud to Personalize Commerce Experiences](#)

Now generally available, easily ingest transactional order data via a native connector for B2C Commerce. Build segments and generate insights combining ecommerce and cross-cloud data. Create intelligent ecommerce experiences for registered shoppers with a B2C Commerce activation target.

[Non-Aggregatable Measures Now Supported in Activation](#)

Non-aggregatable metrics let you personalize messages and make marketing decisions using granular metrics, for example, "last purchase date" for a product category.

[New Calculated Insights Data Types Now Supported in Activation](#)

Activation now supports `DateTime` measures, dimensions, and `Text` measures for Calculated Insights. Expanded data types allow you to support specific use cases like last purchase date to run promotional campaigns.

[Use the Privacy Data Model to Honor Customer Consent Preferences](#)

The privacy data model offers you a robust and extensible way to store consumer privacy preferences. Using the data model starts with Party Consent and focuses into more granular levels of consent to suit your business needs. The Privacy data model can also be used in Segmentation to ensure your Audience counts are properly reflective of consent preferences.

[Salesforce CDP API: New and Changed Items](#)

Use the Salesforce CDP API more effectively with more data objects in version 53.0.

[Download Release Notes PDF for Salesforce CDP Releases Before Winter '22](#)

Looking for release notes before Winter '22? Click this link to download them in PDF: [Salesforce CDP Release Notes](#).

SEE ALSO:

[Salesforce Help: Salesforce CDP \(can be outdated or unavailable during release preview\)](#)

Create CRM Bundles with Data Kits from Your Salesforce CDP Data

Streamline the CRM data bundle creation and set up experience for Salesforce CDP in a few clicks using Data Kits.

Where: This change applies to Lightning Experience.

How: Navigate to Salesforce CDP Setup to create and view your Data Kits.

SEE ALSO:

[Data Kits](#)

Capture Event Updates on Calculated Insights, Identity Resolution, and Schema Changes

Get the latest status change events of your Salesforce CDP schema, Calculated Insights, and Identity Resolution usage automatically. Admin users can use these events in Flow Builder to get notifications of when something errors out in order to investigate.

Where: This change applies to Lightning Experience.

How: The latest status and event of your Salesforce CDP usage updates automatically, making platform features like Reports or Flows more accurate.

Enjoy an Improved Identity Resolution Experience

Identity Resolution has a new location directly in the main navigation of Salesforce CDP. Take advantage of all that identity resolution offers, such as creating rulesets and viewing details, alongside the rest of Salesforce CDP. The new location lets users who have the Data Aware Specialist permission access identity resolution and create unified profiles. Previously, only admin users had access to identity resolution because of its location in setup.

Where: This change applies to Lightning Experience.

Who: Users who have the Data Aware Specialist permission gain access to Identity Resolution automatically in Winter '22.

How: Identity Resolutions created before the Winter '22 release automatically move to the new location in the main navigation with the release, including all existing match rules and reconciliation rules. Navigate to Identity Resolutions in Salesforce CDP to see your new Identity Resolution Ruleset called **All Individuals**.

SEE ALSO:

[Salesforce Help: Identity Resolution \(can be outdated or unavailable during release preview\)](#)

[Trailhead: Data and Identity in Salesforce CDP \(can be outdated or unavailable during release preview\)](#)

Take Control of Unified Profiles with Match Rules

Match rules for linking multiple records into unified profiles have more built-in functionality. Match rules now support custom fields, fuzzy match for first name, and normalized match of address, phone, and email contact points. Create match rules for rulesets based on the Individual entity in Identity Resolution.

Where: This change applies to Lightning Experience.

SEE ALSO:

[Salesforce Help: Identity Resolution \(can be outdated or unavailable during release preview\)](#)

Create Better Unified Individuals with Multiple Individual Rulesets

As part of Identity Resolutions, you can combine match rules and reconciliation rules together into a ruleset for the Individual entity to use throughout Salesforce CDP. You can create two rulesets with different configurations for the Individual entity to explore your data and create the best unified individuals for your use case. Use Data Explorer to compare the unified profiles created by the different match and reconciliation rules.

Where: This change applies to Lightning Experience.

How: In **Identity Resolutions**, click **New** and create up to two rulesets based on the Individual entity. Only the first ruleset is available in Segmentation and Activation.

SEE ALSO:

[Salesforce Help: Identity Resolution \(can be outdated or unavailable during release preview\)](#)

Drive Actions from Salesforce CDP with Data Actions

Create data actions based on the insights stored in Salesforce CDP to leverage streaming and cross-functional organization. Data Actions helps drive the actionability of the near real-time Insight. A Data Action containing a rich payload can be triggered based on certain conditions and can enable downstream systems to drive an action or orchestration

Where: This change applies to Lightning Experience.

How: Navigate to the Data Action Targets tab in Salesforce CDP and create a data action target. After you create the target, navigate to the Data Actions tab in Salesforce CDP and create a data action.

SEE ALSO:

[Control and Metadata Change Events](#)

Download Datasets into Salesforce CDP to Use in Tableau Desktop

Download selected entities in Salesforce CDP's data model along with their relationships with one click as a Tableau Data Source (TDS) file. Opening a TDS in Tableau Desktop eliminates the need to remodel CDP data in Tableau.

Where: This change applies to Lightning Experience.

How: Navigate to the Salesforce CDP Data Model tab, and click **Download Tableau Source File**.

Stream Data from Your Own External Sources using Ingestion API

Use the Ingestion API, a REST API, to stream data from your external sources into Salesforce CDP. You can create a connector, upload your schema, and create data streams into your org. Using the API, you can stream data in incremental fashion or ingest in bulk.

Where: This change applies to Lightning Experience.

Connect to Mulesoft for a User-Friendly API Experience

Use the power of Mulesoft and its robust ecosystem of data connectors to more easily bring your data into Salesforce CDP. Enrich existing Salesforce CDP records to automate data ingestion from third-party data sources.

Where: This change applies to MuleSoft AnyPoint Exchange.

Map Your Data in Table View

Switch between canvas view and table view when mapping your data. Table view provides a more accessible experience when connecting data source objects to data model objects.

Where: This change applies to Lightning Experience.

How: Navigate to the Data Streams tab in Salesforce CDP, and click the view toggle dropdown.

SEE ALSO:

[Data Mapper Views](#)

Draw Insights on Salesforce CDP Data Using Tableau CRM (Beta)

Use Salesforce CDP data in Tableau CRM to run deep explorations on your unified customer data source without loading data or preparing it in Tableau CRM first. After setting up a live connection to Salesforce CDP, you can run queries on Salesforce CDP data associated with the connection in real time. You can also build dashboard charts and tables based on the queries that you run on this data.

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: 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: Tableau CRM Direct Data for Salesforce CDP is available to users with a Salesforce CDP license.

Why: With Tableau CRM Direct Data for Salesforce CDP, you can analyze your customer data to identify the customers most likely to churn. Or, create powerful visualizations that reveal purchasing patterns within various customer segments.

Connect Your B2C Commerce Data to Salesforce CDP

You can connect one or more production B2C Commerce instances to Salesforce CDP with clicks, not code. The connector can bring in transactional order data with related product catalog and profile data. You can choose which B2C Commerce site data is brought into Salesforce CDP. For example, use enriched unified profiles with e Commerce order data to deliver more personalized cross-channel experiences.

Where: Available in all Salesforce CDP editions.

When: B2C Commerce Connector is available in the Winter '22 release.

How: To configure the connector and deploy B2C Commerce data streams, you must be a Salesforce CDP Admin. All other user profiles have access to the B2C Commerce data after it's ingested into Salesforce CDP. In Salesforce CDP, access CDP Setup and then the B2C Commerce configurations. Connect to your B2C Commerce instance, and select one or more B2C Commerce sites you want to ingest data from. After your B2C Commerce instance is connected, you can create data streams for that instance using the Order Bundle.

Salesforce Interactions Web SDK for Salesforce CDP and Interaction Studio

A shared Web SDK across Salesforce CDP and Interaction Studio simplifies the configuration process for you. You can instrument the website one time and easily migrate from one product to the other. Additionally, we now support remote configuration through the sitemap. Load the sitemap in Salesforce CDP and update it at any time without the need to redeploy the website each time you must update tracking. With the sitemap you can update website tracking as your marketing strategy evolves.

Where: This change applies to Lightning Experience.

How: To set up the Salesforce Interactions Web SDK, register the website as a website app. Work with your website developer and data aware specialist to complete the setup.

Get a Complete View of a Salesforce CDP Unified Individual with Profile Explorer

With Profile Explorer in Salesforce CDP, you can view unified individual profiles. A Unified Individual profile shows data about Unified Individual fields, Contact points, Identity Resolution, Engagement, and Calculated Insights. Use the new Profile Explorer to search for Unified Individual profiles and view all the attached data.

Where: This change applies to Lightning Experience and is available to all Salesforce CDP customers.

Who: Salesforce CDP Users with access to Data Explorer can also access Profile Explorer.

How: Access the Profile Explorer tab in the Salesforce CDP interface. Use the search to find a unified profile by selecting attributes like First Name, Last Name, Email address, Phone number, and Individual ID.

SEE ALSO:

[Profile Explorer in Salesforce CDP](#)

[Search for a Unified Individual in the Salesforce CDP Profile Explorer](#)

Create Streaming Insights in Real-Time

Create metrics on streaming data coming from real-time data sources, such as website engagement or website clickstreams, to use real-time insights. Drive more value with insights by enabling cross-functional orchestration in Salesforce CDP. This release supports streaming engagement data from Web SDK, Mobile SDK, and Interaction Studio.

Where: This change applies to Lightning Experience.

How: Navigate to the Calculated Insights tab in Salesforce CDP and create a streaming insight.

Create Calculated Insights with Insight Builder

Create metrics in Salesforce CDP using the intuitive UX tool, no SQL knowledge required.

Where: This change applies to Lightning Experience.

Why: Insight Builder is a business-analyst focused and user-friendly metrics authoring tool.

How: Navigate to the Calculated Insights tab in Salesforce CDP and create an insight with the visual builder.

Simplify Calculated Insights Building with Metrics on Metrics

Use metrics on metrics to build more comprehensive insights, such as engagement scores, customer health scores, and customer attribution scores. Organize complex Calculated Insights SQL data into logical steps and stitch powerful workflows. Metrics on metrics also allow you to improve metrics reuse for multiple use case scenarios.

Where: This change applies to Lightning Experience.

How: Navigate to the Calculated Insights tab in Salesforce CDP and create a new calculated insight using metrics.

Create Smarter Segments with the Power of Einstein Engagement Scores

Email Studio and MobilePush starter bundles automatically include Einstein Engagement Scores and make them available in the attribute library when building segments. Building segments based on these scores lets marketers target the most engaged users and suppress disengaged users for higher click-through rates, as well as create personalized and intelligent campaigns. Use the EinsteinEmailEngagementScores and EinsteinMobileEngagementScores objects in the attribute library to build your segments.

Where: This change applies to Lightning Experience with Einstein Engagement Scoring enabled in Marketing Cloud.

SEE ALSO:

[Salesforce Help: Starter Data Bundles \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Segment Canvas Interface \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Einstein Engagement Scoring Data Package \(can be outdated or unavailable during release preview\)](#)

Build Segments Based on Many-1-Many Relationships

All Related objects are now supported in the attribute library for even more flexibility in building segments. We're now enabling objects under Many-to-1 to 1-to-Many relationships. For example, you can build a segment based on the many ProductAttribute object mapped to the one Product object, and the one Product object mapped to the many SalesOrderProduct object.

Where: This change applies to Lightning Experience.

SEE ALSO:

[Salesforce Help: Segment Canvas Interface \(can be outdated or unavailable during release preview\)](#)

Find Customers to Engage with Again

Use the Greater Than Last Number of Days filter in segmentation to find customers who have previously completed a task. For example, build a segment of customers who have visited your website prior to 7 days ago, regardless of their activity in the past 7 days. Use this segment and send a targeted promotion to encourage them to come back.

Where: This change applies to Lightning Experience.

SEE ALSO:

[Salesforce Help: Datatype Expression Operators \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Segments \(can be outdated or unavailable during release preview\)](#)

Complex Calculated Insights Functions Now Supported in Segmentation

Segmentation now supports new complex Calculated Insights measures: non-numeric, such as text and date, and non-aggregatable, such as rank, bucket, and range. Navigate to the Segmentation tab in Salesforce CDP and create a segment using measures from Calculated Insights.

Where: This change applies to Lightning Experience.

Find Activations Easily in Marketing Cloud Shared Data Extensions

To make it easier to manage all your Salesforce CDP activations across different platforms, each activation to Marketing Cloud now includes an automatically created unique ID. The ID includes the segment ID and activation ID from Salesforce CDP. The ID is visible in Marketing Cloud Shared Data Extensions to make searching and finding specific activations easier in Marketing Cloud.

Where: This change applies to Lightning Experience with Shared Data Extensions enabled in Marketing Cloud.

SEE ALSO:

[Salesforce Help: Find Segments in Marketing Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Data Extensions for Salesforce CDP \(can be outdated or unavailable during release preview\)](#)

Activate to Commerce Cloud to Personalize Commerce Experiences

Now generally available, easily ingest transactional order data via a native connector for B2C Commerce. Build segments and generate insights combining ecommerce and cross-cloud data. Create intelligent ecommerce experiences for registered shoppers with a B2C Commerce activation target.

Where: This change applies to Lightning Experience.

SEE ALSO:

[Salesforce Help: Commerce Cloud Connector \(can be outdated or unavailable during release preview\)](#)

Non-Aggregatable Measures Now Supported in Activation

Non-aggregatable metrics let you personalize messages and make marketing decisions using granular metrics, for example, “last purchase date” for a product category.

Where: This change applies to Lightning Experience.

How: Navigate to the Activation tab in Salesforce CDP, and create an activation using measures from Calculated Insights.

New Calculated Insights Data Types Now Supported in Activation

Activation now supports DateTime measures, dimensions, and Text measures for Calculated Insights. Expanded data types allow you to support specific use cases like last purchase date to run promotional campaigns.

Where: This change applies to Lightning Experience.

How: Navigate to the Activation tab in Salesforce CDP, and create an activation using measures from Calculated Insights.

Use the Privacy Data Model to Honor Customer Consent Preferences

The privacy data model offers you a robust and extensible way to store consumer privacy preferences. Using the data model starts with Party Consent and focuses into more granular levels of consent to suit your business needs. The Privacy data model can also be used in Segmentation to ensure your Audience counts are properly reflective of consent preferences.

Where: This change applies to Lightning Experience.

SEE ALSO:

[Salesforce Help: Privacy Data Model \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Consent Management \(can be outdated or unavailable during release preview\)](#)

Salesforce CDP API: New and Changed Items

Use the Salesforce CDP API more effectively with more data objects in version 53.0.

Receive real-time notifications by subscribing to the channels of these new and changed standard platform events.

Be notified of an action that occurs

Use the new `DataObjectDataChgEvent` object.

Be notified of metadata change for Data Lake, Data Model, and Calculated Insight objects

Use the new `DataObjectMetadataChgEvent` object.

Metadata API includes new types and fields.

Create a top-level data kit container definition

Use the new `DataPackageKitDefinition` metadata type.

Retrieve information about a data kit, such as CRM bundle and Data Models

Use the new `DataPackageKitObject` metadata type.

SEE ALSO:

[Salesforce Developer Guide: Standard Platform Event Object List \(can be outdated or unavailable during release preview\)](#)

Download Release Notes PDF for Salesforce CDP Releases Before Winter '22

Looking for release notes before Winter '22? Click this link to download them in PDF: [Salesforce CDP Release Notes](#).

Salesforce CMS

Preview your content before you publish to make sure things are just right.

IN THIS SECTION:

[Preview Salesforce CMS Content on Your Site](#)

Now content managers and content admins can preview Salesforce CMS content as it appears in their desktop, tablet, or mobile Experience Cloud sites before you publish to a channel. Previously, you couldn't see how CMS content appeared in different site contexts before publishing.

Preview Salesforce CMS Content on Your Site

Now content managers and content admins can preview Salesforce CMS content as it appears in their desktop, tablet, or mobile Experience Cloud sites before you publish to a channel. Previously, you couldn't see how CMS content appeared in different site contexts before publishing.

Where: This change applies to Lightning Experience when you [purchase Salesforce CMS](#) in Enterprise, Performance, Unlimited, and Developer editions.

Who: Content preview is available with a paid CMS license.

How: Open the content details page in Salesforce CMS and click **Preview**. The Experience Builder site preview opens in a new tab and the content detail page shows the site's configuration for the content type. To preview the content in your Experience Cloud site, select a view mode, either desktop, tablet, or mobile, and select a channel.

Security, Identity, and Privacy

To comply with browser requirements, you must have a My Domain, or we deploy one for you. Verify your identity with biometric built-in authenticators. To help you prepare for the multi-factor authentication (MFA) requirement, use the MFA Rollout Pack. Enjoy a more intuitive consent data model and Portability Policy dashboards. Event Monitoring includes four new event log file types and more detailed Transaction Security policy notification emails. Encrypt more Financial Services Cloud data at rest. Find sensitive data across your org with the new Einstein Data Detect managed package (generally available). And Threat Detection integration with Security Center is now generally available, along with customizable alerts for monitoring security configuration changes.

IN THIS SECTION:

[Domains](#)

All Salesforce orgs must have a My Domain. Enable enhanced domains to meet the latest browser requirements. Restrict users' email domains and require SOAP API calls to log in with My Domain. And we're moving custom domains that serve Experience Cloud sites to Salesforce Edge Network.

[Identity and Access Management](#)

Salesforce Identity and Access Management now supports built-in authenticators, tracking of enforced multi-factor authentication (MFA) challenges, and Identity Connect 7.1. Prepare for the upcoming MFA requirement with the MFA Rollout Pack. For Salesforce Customer Identity, benefit from a new email template that provides consistent branding and control over customer communications.

[Privacy Center](#)

Changes to the Consent Data Model include new objects that allow you to create multiple brands and relationships in one Salesforce org. Enhancements to the existing Portability Policy feature make navigation more user-friendly.

[Salesforce Shield](#)

Shield Platform Encryption offers support for more Financial Services Cloud fields. Event Monitoring delivers better Transaction Security notification emails and four new Event Log File types. You can append only new data to Event Monitoring Analytics app datasets for more efficient updates (beta). Get more granular control over Field Audit Trail retention policies. And Einstein Data Detect (generally available) joins the Shield family, offering a faster way to find sensitive data no matter where it's entered into your org.

[Security Center](#)

Centralized Threat Detection is now generally available. Create in-app and email alerts to instantly learn about changes to security settings that you want to monitor. Parse metric data with filters for the results view.

[Other Security Changes](#)

The CORS allowlist now supports browser extension requests to Salesforce REST resources. Prevent data loss and recover quickly from incorrect data updates or integration errors with the new Backup and Restore feature.

Domains

All Salesforce orgs must have a My Domain. Enable enhanced domains to meet the latest browser requirements. Restrict users' email domains and require SOAP API calls to log in with My Domain. And we're moving custom domains that serve Experience Cloud sites to Salesforce Edge Network.

IN THIS SECTION:

[Deploy a My Domain \(Release Update\)](#)

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. If you prefer to use a different My Domain name, you can change it. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced. This update was first made available in Winter '21 and is enforced in Winter '22.

[Enable User Email Domain Restrictions](#)

To restrict the email domains allowed in a user's Email field, enable the email domain allowlist. Previously, you contacted Salesforce Support to enable this feature.

[Require SOAP API Calls to Log In with My Domain](#)

By default, SOAP API calls can log in with a generic Salesforce login URL, such as `https://login.salesforce.com`, or your My Domain login URL, such as `https://mycompany.my.salesforce.com`. To further restrict access to your org, require that SOAP API logins use your My Domain login URL.

[Prepare for Your Custom Domain to Use Salesforce Edge Network](#)

To deliver a consistent user experience regardless of a user's location, Salesforce is migrating custom domains that serve Experience Cloud sites to the Salesforce Edge Network infrastructure. To prepare, update your allowlists to include the latest Salesforce IP ranges.

[Enable Enhanced Domains \(Release Update\)](#)

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 this update is enforced. This update was first made available in Summer '21.

[Domain HTTPS Option Was Renamed](#)

The domain HTTPS option, Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner and a shared or single HTTPS certificate, was renamed. It's now called: Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner.

Deploy a My Domain (Release 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. If you prefer to use a different My Domain name, you can change it. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced. This update was first made available in Winter '21 and is enforced in Winter '22.

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

When: This update applies to orgs without a deployed My Domain. This update was first available in Winter '21. For production orgs and related sandboxes, this update 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.

For information about when this update is enforced in demo, trial, free, and Developer Edition orgs and related sandboxes, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

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.

SEE ALSO:

[Salesforce Help: My Domain \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Plan for Salesforce Domain Changes: My Domain and Enhanced Domains](#)

[Release Updates](#)

Enable User Email Domain Restrictions

To restrict the email domains allowed in a user's Email field, enable the email domain allowlist. Previously, you contacted Salesforce Support to enable this feature.

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

How: From Setup, in the Quick Find Box, enter *User Management*, and then select **User Management Settings**. Turn on **Email Domain Allowlist**. Then manage the permitted email domains for users from the Allowed Email Domains Setup page.

SEE ALSO:

[Salesforce Help: Restrict User Email Domains \(can be outdated or unavailable during release preview\)](#)

Require SOAP API Calls to Log In with My Domain

By default, SOAP API calls can log in with a generic Salesforce login URL, such as `https://login.salesforce.com`, or your My Domain login URL, such as `https://mycompany.my.salesforce.com`. To further restrict access to your org, require that SOAP API logins use your My Domain login URL.

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

How: This option is available through the `doesApiLoginRequireOrgDomain` field on the `MyDomainSettings` Metadata API type in API version 47.0 and later. In Winter '22, you can enable this option from the My Domain Setup page.

From Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. In the Policies section, click **Edit**. In production, select **Prevent SOAP API login from https://login.salesforce.com**. Or, in a sandbox, select **Prevent SOAP API login from https://test.salesforce.com**. Then save your changes.

SEE ALSO:

[Salesforce Help: Set My Domain Login and Redirect Policies \(can be outdated or unavailable during release preview\)](#)

Prepare for Your Custom Domain to Use Salesforce Edge Network

To deliver a consistent user experience regardless of a user's location, Salesforce is migrating custom domains that serve Experience Cloud sites to the Salesforce Edge Network infrastructure. To prepare, update your allowlists to include the latest Salesforce IP ranges.

Where: This change applies to custom domains serving [Aura, LWR, and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. It applies only to custom domains with the HTTPS option, "Salesforce serves the domain over HTTPS on Salesforce's servers using your HTTPS certificate."

SEE ALSO:

[Get Ready for Salesforce Edge Network for Custom Domains](#)

Enable Enhanced Domains (Release 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 this update is enforced. This update was first made available in Summer '21.

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

When: Enhanced domains are available in Hyperforce orgs and in orgs with a deployed My Domain routed through Salesforce Edge Network. For updates about the availability of this feature in other orgs and when it's enabled by default in new orgs, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

Salesforce enforces this update in Winter '23. 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

URL TYPE	ENHANCED DOMAIN FORMAT
Experience Builder	MyDomainName .builder.salesforce-experience.com
Salesforce Sites	MyDomainName .my.salesforce-sites.com
Visualforce pages	MyDomainName--PackageName .vf.force.com
Sandbox login	MyDomainName--SandboxName .sandbox.my.salesforce.com
Experience Cloud sites in a sandbox org	MyDomainName--SandboxName .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 \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Plan for Salesforce Domain Changes: My Domain and Enhanced Domains](#)

[Release Updates](#)

Domain HTTPS Option Was Renamed

The domain HTTPS option, Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner and a shared or single HTTPS certificate, was renamed. It's now called: Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner.

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

SEE ALSO:

[Salesforce Help: Options to Serve a Custom Domain \(can be outdated or unavailable during release preview\)](#)

Identity and Access Management

Salesforce Identity and Access Management now supports built-in authenticators, tracking of enforced multi-factor authentication (MFA) challenges, and Identity Connect 7.1. Prepare for the upcoming MFA requirement with the MFA Rollout Pack. For Salesforce Customer Identity, benefit from a new email template that provides consistent branding and control over customer communications.

IN THIS SECTION:

[Salesforce Identity for Your Employees](#)

Users can now register biometric built-in authenticators, such as Touch ID, Face ID, and Windows Hello. You can monitor which users register built-in authenticators and when they use them. As you prepare for the multi-factor authentication (MFA) requirement, check out the MFA Rollout Pack for customizable templates. Also, users are no longer subject to MFA challenges in Salesforce when they log in through an authentication provider that supports single sign-on. And you can track enforced MFA challenges with four new verification history fields in users reports. For increased security, configure forced authentication when Salesforce is acting as a SAML identity provider. Salesforce now prevents users from logging in with a username and password as GET query string parameters to the login URL. Upgrade to Identity Connect 7.1 as soon as possible because Salesforce no longer supports downloads for Identity Connect 2.1 and Identity Connect 3.0.X.X. For improved functionality, customize the way your JIT handler processes user information, include refresh tokens in the OAuth 2.0 user-agent flow, and authorize additional access to Salesforce CDP data.

[Salesforce Identity for Your Customers](#)

Maintain consistent branding for your site and control customer communications with the Device Activation email template. When you're using Apex to manage identity verification for Experience Cloud sites, guarantee that self-registration verification messages are sent in the right language. To improve privacy and security, we shortened durations of the `lloopch_lloid` and `hideldidentityDialog` cookies and increased the length of one-time passwords.

Salesforce Identity for Your Employees

Users can now register biometric built-in authenticators, such as Touch ID, Face ID, and Windows Hello. You can monitor which users register built-in authenticators and when they use them. As you prepare for the multi-factor authentication (MFA) requirement, check out the MFA Rollout Pack for customizable templates. Also, users are no longer subject to MFA challenges in Salesforce when they log in through an authentication provider that supports single sign-on. And you can track enforced MFA challenges with four new verification history fields in users reports. For increased security, configure forced authentication when Salesforce is acting as a SAML identity provider. Salesforce now prevents users from logging in with a username and password as GET query string parameters to the login URL. Upgrade to Identity Connect 7.1 as soon as possible because Salesforce no longer supports downloads for Identity Connect 2.1 and Identity Connect 3.0.X.X. For improved functionality, customize the way your JIT handler processes user information, include refresh tokens in the OAuth 2.0 user-agent flow, and authorize additional access to Salesforce CDP data.

IN THIS SECTION:

[Trailblazer.me Supports New Languages](#)

To improve accessibility for our global Trailblazer community, Trailblazer.me now supports 11 more languages: Danish, Dutch, Finnish, Italian, Korean, Norwegian, Russian, Simplified Chinese, Spanish (Spain), Swedish, and Traditional Chinese.

[Streamline Identity Verification with Built-In Authenticators \(Beta\)](#)

With new support for biometric methods, verifying your identity in Salesforce just got even easier. Users can register biometric built-in authenticators, such as Touch ID, Face ID, and Windows Hello. Anytime users are challenged to verify their identity, including multi-factor authentication and device activations, they're prompted to use their built-in authenticator.

[Get Users Ready for Multi-Factor Authentication with Change Management Resources](#)

As you prepare for the multi-factor authentication (MFA) requirement that goes into effect on February 1, 2022, check out the MFA Rollout Pack. It provides customizable planning and change management templates to help you roll out MFA to your users.

[MFA Challenges for Authentication Provider Single Sign-On Logins Are No Longer Enforced](#)

By default, users who log in to Salesforce through an authentication provider that supports single sign-on (SSO) are no longer subject to multi-factor authentication (MFA) challenges in Salesforce. To restore MFA challenges for those users, you can update the session security levels for their assigned profiles.

[Verify Logins in Users Reports](#)

Four new verification history fields in users reports let you view user login verification data. Use these fields in combination with login history fields to identify which user logins have multi-factor authentication (MFA) challenges enforced.

[Require Users to Reauthenticate When Accessing Service Providers with Single Sign-On](#)

To protect sensitive resources, you can now configure forced authentication when Salesforce is acting as a SAML identity provider. With forced authentication, users who are already logged in to Salesforce must reenter their credentials when trying to access a third-party service provider. After setting up this feature, you can use the identity provider event log to monitor when users have been logged out due to forced authentication.

[Login Credentials Using URL Query Strings Are Disabled \(Release Update\)](#)

With this update, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Users who try to do so are redirected to the login page. This update improves security.

[Customize How Just-in-Time Provisioning Handlers Process Attributes in SAML Assertions](#)

If you're configuring just-in-time (JIT) provisioning with a custom Apex handler, and your single sign-on (SSO) identity provider sends encrypted SAML assertions, Salesforce now passes the decrypted assertion to your JIT handler. The previous process sometimes limited the JIT handler from accessing certain user attributes. The decrypted assertion is stored as a value with the key `Sfdc.SamlAssertion`. With access to the decrypted assertion, you can modify the way your JIT handler processes the assertion to make sure no attribute gets left behind.

[Upgrade to Identity Connect 7.1.1](#)

Identity Connect 7.1.1 offers extensive security enhancements. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X. We recommend that you upgrade to Identity Connect 7.1.1 as soon as possible.

[Give Authorized Access to Salesforce CDP Data](#)

To authorize additional access to Salesforce CDP data, you can assign a connected app two new OAuth scopes. With the Perform ANSI SQL queries on Salesforce CDP data OAuth scope, the connected app can perform ANSI SQL queries of Salesforce CDP data on behalf of the user. The Manage Salesforce CDP profile data OAuth scope gives the connected app access to Salesforce CDP REST API data to manage profile records.

[OAuth 2.0 User-Agent Flow Supports `mobileauth.salesforce.com/analytics` Redirect URL for Refresh Tokens](#)

The OAuth 2.0 user-agent flow now supports refresh tokens when the `scope=refresh_token` is included in the request and the redirect URL is `https://mobileauth.salesforce.com/analytics/oauth/done`.

Trailblazer.me Supports New Languages

To improve accessibility for our global Trailblazer community, Trailblazer.me now supports 11 more languages: Danish, Dutch, Finnish, Italian, Korean, Norwegian, Russian, Simplified Chinese, Spanish (Spain), Swedish, and Traditional Chinese.

Where: This change applies to all editions.

When: This change takes effect on November 17, 2021.


SEE ALSO:

[Trailblazer.me Accounts](#)

Streamline Identity Verification with Built-In Authenticators (Beta)

With new support for biometric methods, verifying your identity in Salesforce just got even easier. Users can register biometric built-in authenticators, such as Touch ID, Face ID, and Windows Hello. Anytime users are challenged to verify their identity, including multi-factor authentication and device activations, they're prompted to use their built-in authenticator.

Where: This change applies to Lightning Experience and Salesforce Classic in all 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: There are a few great reasons to let your users verify their identity with built-in authenticators.

- They're convenient. Users can breeze through identity verification without needing a second device, such as a security key or a mobile device with an authenticator app.
- They're secure. Built-in authenticators are based on the FIDO2 Web Authentication (WebAuthn) Platform standard, making them extra resistant to security threats, like phishing.
- They ensure privacy. The user's biometric data never leaves their device.

Before you enable built-in authenticators, it's important to keep these things in mind.

- The user's device, browser, and operating system must support the FIDO2 WebAuthn Platform standard.
- To use a built-in authenticator, the user must have access to the device where it's enrolled. Users who access Salesforce from multiple devices must register a built-in authenticator on each device. We also recommend that users register another verification method, such as Salesforce Authenticator.

SEE ALSO:

[Salesforce Help: Use a Built-In Authenticator as a Verification Method \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Register a Built-In Authenticator for Identity Verification \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Get Users Ready for Multi-Factor Authentication with Change Management Resources

As you prepare for the multi-factor authentication (MFA) requirement that goes into effect on February 1, 2022, check out the MFA Rollout Pack. It provides customizable planning and change management templates to help you roll out MFA to your users.

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

How: Download the MFA Rollout Pack from the [Salesforce MFA Site](#). The pack includes:

- An MFA overview presentation to share with your leadership and stakeholders
- A sample project schedule
- A sample drip email campaign to prepare users for the coming changes to your login process
- A user training deck to use for virtual or in-person sessions
- Onboarding guides to walk users through MFA registration steps on your launch day

SEE ALSO:

[Get Ready for the Future Requirement to Enable Multi-Factor Authentication \(MFA\)](#)

MFA Challenges for Authentication Provider Single Sign-On Logins Are No Longer Enforced

By default, users who log in to Salesforce through an authentication provider that supports single sign-on (SSO) are no longer subject to multi-factor authentication (MFA) challenges in Salesforce. To restore MFA challenges for those users, you can update the session security levels for their assigned profiles.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Personal, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

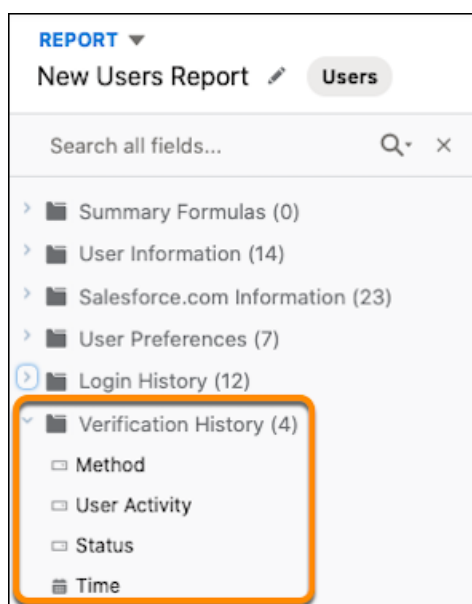
How: To restore MFA challenges for a user, set Session Security Level Required at Login to **High Assurance** and confirm that Multi-Factor Authentication is in the High Assurance column.

Verify Logins in Users Reports

Four new verification history fields in users reports let you view user login verification data. Use these fields in combination with login history fields to identify which user logins have multi-factor authentication (MFA) challenges enforced.

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

How: Verification History fields include login method, user activity, login status, and time of login.



Require Users to Reauthenticate When Accessing Service Providers with Single Sign-On

To protect sensitive resources, you can now configure forced authentication when Salesforce is acting as a SAML identity provider. With forced authentication, users who are already logged in to Salesforce must reenter their credentials when trying to access a third-party service provider. After setting up this feature, you can use the identity provider event log to monitor when users have been logged out due to forced authentication.

Where: This change applies to Salesforce Classic (not available in all orgs) and Lightning Experience in all editions.

How: We provide an example forced authentication SAML request. To configure forced authentication, share this request with your service provider. Your service provider then uses the SAML request to tell Salesforce that the user must reauthenticate. When Salesforce is acting as the identity provider, forced authentication is automatically supported, so no additional setup in your org is required.

SEE ALSO:

[Salesforce Help: Salesforce as a SAML Identity Provider \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Prerequisites for Integrating Service Providers with SAML \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use the Identity Provider Event Log \(can be outdated or unavailable during release preview\)](#)

Login Credentials Using URL Query Strings Are Disabled (Release Update)

With this update, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Users who try to do so are redirected to the login page. This update improves security.

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

When: Salesforce enforces this update in Spring '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: This update impacts you if your users or integrations log in or authenticate by passing `un=` and `pw=` as query string parameters to the login URL.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For **Disable Users from Logging in to an Org with Login Credentials as Query String Parameters**, enable the test run and note if users have login or authentication issues. If they're redirected to the login page or see a redirect status code, change your login and authentication integrations by the Spring '22 release.

Customize How Just-in-Time Provisioning Handlers Process Attributes in SAML Assertions

If you're configuring just-in-time (JIT) provisioning with a custom Apex handler, and your single sign-on (SSO) identity provider sends encrypted SAML assertions, Salesforce now passes the decrypted assertion to your JIT handler. The previous process sometimes limited the JIT handler from accessing certain user attributes. The decrypted assertion is stored as a value with the key `Sfdc.SamlAssertion`. With access to the decrypted assertion, you can modify the way your JIT handler processes the assertion to make sure no attribute gets left behind.

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

How: Configure Salesforce as a service provider for SAML SSO and enable custom JIT with an Apex handler. Then use the `SamlJitHandler` interface to customize the JIT handler as needed.

SEE ALSO:

[Salesforce Help: Just-in-Time Provisioning for SAML \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Configure Salesforce as the Service Provider with SAML Single Sign-On \(can be outdated or unavailable during release preview\)](#)

[Apex Reference Guide: SamlJitHandler Interface \(can be outdated or unavailable during release preview\)](#)

Upgrade to Identity Connect 7.1.1

Identity Connect 7.1.1 offers extensive security enhancements. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X. We recommend that you upgrade to Identity Connect 7.1.1 as soon as possible.

Where: This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

How: To install Identity Connect 7.1.1, use the download link on the Identity Connect setup page. Before you upgrade from Identity Connect 2.1 or 3.0.X.X, make sure that you have the latest version of the Identity Connect managed package installed.



Note: We recommend that all users upgrade to Identity Connect 7.1.1 as soon as possible. But if you have Identity Connect 3.0.1.2 now and can't upgrade right away, we recommend that you install the Identity Connect 3.0.1.2 patch to fix security issues.

SEE ALSO:

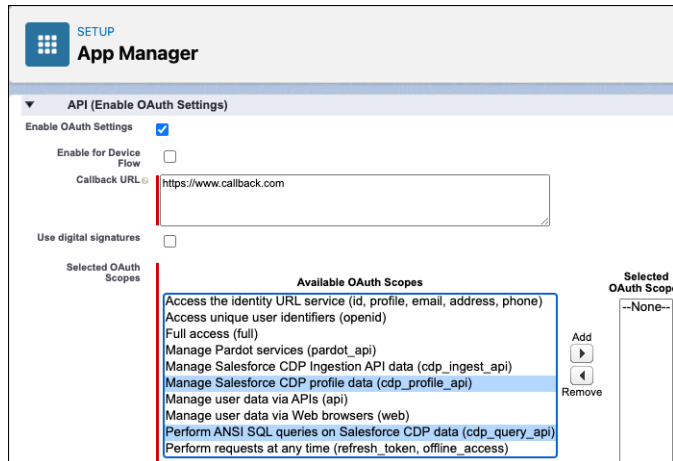
[Salesforce Help: Identity Connect \(can be outdated or unavailable during release preview\)](#)

Give Authorized Access to Salesforce CDP Data

To authorize additional access to Salesforce CDP data, you can assign a connected app two new OAuth scopes. With the Perform ANSI SQL queries on Salesforce CDP data OAuth scope, the connected app can perform ANSI SQL queries of Salesforce CDP data on behalf of the user. The Manage Salesforce CDP profile data OAuth scope gives the connected app access to Salesforce CDP REST API data to manage profile records.

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 OAuth scopes to the connected app that represents your external app.



SEE ALSO:

[Salesforce Help: Enable OAuth Settings for API Integration \(can be outdated or unavailable during release preview\)](#)

OAuth 2.0 User-Agent Flow Supports `mobileauth.salesforce.com/analytics` Redirect URL for Refresh Tokens

The OAuth 2.0 user-agent flow now supports refresh tokens when the `scope=refresh_token` is included in the request and the redirect URL is `https://mobileauth.salesforce.com/analytics/oauth/done`.

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

SEE ALSO:

[Salesforce Help: OAuth 2.0 User-Agent Flow for Desktop or Mobile App Integration \(can be outdated or unavailable during release preview\)](#)

Salesforce Identity for Your Customers

Maintain consistent branding for your site and control customer communications with the Device Activation email template. When you're using Apex to manage identity verification for Experience Cloud sites, guarantee that self-registration verification messages are sent in the right language. To improve privacy and security, we shortened durations of the `lloopch_lolid` and `hideldentityDialog` cookies and increased the length of one-time passwords.

IN THIS SECTION:

[Tailor Device Activation Emails for Experience Cloud Sites](#)

Take control of your customer communications with the Device Activation email template. You can use the template to customize the emails your users receive when they log in from an unfamiliar browser, app, or location.

[Control the Language Used for Experience Cloud Self-Registration Verification Messages](#)

To give you more control over email and SMS verification messages, we changed how the `initSelfRegistration` method detects a user's language. You can now specify a language in the User object to guarantee that verification messages use the correct language.

[Identity Cookies Have Shorter Durations](#)

To improve privacy, we shortened the `loopch_lcid` cookie duration from 2 years to 1 year. And we changed the duration of the `hideIdentityDialog` cookie from 50 years to 1 year.

[Email and SMS One-Time Password Codes Are Longer](#)

To improve security, we increased the length of one-time passwords (OTPs), also known as verification codes, from five digits to six. This change applies to OTPs sent through email and SMS. If you have customizations that rely on five-digit OTPs, such as Apex implementations for multi-factor authentication or passwordless login, make sure you update them.

[Get Information About Named Credentials in the EventLogFile](#)

Capture information about Apex callouts that use named credentials as their endpoints with the `EventLogFile` object's new Named Credential event type. This event type is ideal for auditing the installed managed packages that use named credentials.

[Extend User Sessions for High Volume Customer Portal Users \(Beta\)](#)

Make it easy for users with the High Volume Customer Portal user license to stay logged into your site. Keep users logged in for up to 7 days of inactivity, and allow them to remain logged in even after they close their browser.

Tailor Device Activation Emails for Experience Cloud Sites

Take control of your customer communications with the Device Activation email template. You can use the template to customize the emails your users receive when they log in from an unfamiliar browser, app, or location.

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:

[Summer '21 Release Notes: Customize Your Experience Cloud Site's Device Activation Emails](#)

Control the Language Used for Experience Cloud Self-Registration Verification Messages

To give you more control over email and SMS verification messages, we changed how the `initSelfRegistration` method detects a user's language. You can now specify a language in the User object to guarantee that verification messages use the correct language.

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:

[Summer '21 Release Notes: Specify a Language for Email and SMS Messages When Using `initSelfRegistration`](#)

Identity Cookies Have Shorter Durations

To improve privacy, we shortened the `llpoch_lolid` cookie duration from 2 years to 1 year. And we changed the duration of the `hideIdentityDialog` cookie from 50 years to 1 year.

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

SEE ALSO:

[Salesforce Help: Experience Cloud Cookies \(can be outdated or unavailable during release preview\)](#)

Email and SMS One-Time Password Codes Are Longer

To improve security, we increased the length of one-time passwords (OTPs), also known as verification codes, from five digits to six. This change applies to OTPs sent through email and SMS. If you have customizations that rely on five-digit OTPs, such as Apex implementations for multi-factor authentication or passwordless login, make sure you update them.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

SEE ALSO:

[Salesforce Help: Define Identity Verification Settings for Your Orgs and Experience Cloud Sites \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Implement Multi-Factor Authentication with Apex \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Choose Your Passwordless Login Implementation \(can be outdated or unavailable during release preview\)](#)

Get Information About Named Credentials in the EventLogFile

Capture information about Apex callouts that use named credentials as their endpoints with the `EventLogFile` object's new Named Credential event type. This event type is ideal for auditing the installed managed packages that use named credentials.

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.

SEE ALSO:

[Get the Namespace of Installed Managed Packages That Access Named Credentials](#)

Extend User Sessions for High Volume Customer Portal Users (Beta)

Make it easy for users with the High Volume Customer Portal user license to stay logged into your site. Keep users logged in for up to 7 days of inactivity, and allow them to remain logged in even after they close their browser.

Where: This change applies to Lightning Experience and Salesforce Classic 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](#).

How: In profile session settings, select a timeout value for **Session Times Out After**, and select **Keep users logged in when they close the browser**.

Privacy Center

Changes to the Consent Data Model include new objects that allow you to create multiple brands and relationships in one Salesforce org. Enhancements to the existing Portability Policy feature make navigation more user-friendly.

IN THIS SECTION:

[Track Consent Preferences for Multiple Brands](#)

Store customer consent preferences for multiple brands that exist in one Salesforce org. Use the Business Brand object to identify different brands that share a parent brand. Then use the Customer and Seller objects to define unique relationships to these brands.

[Manage Portability Policies with Feature Enhancements](#)

The Portability Policy dashboard you already know and love has new functionalities. Now you can activate, edit, and delete inactive policies, run policies directly from the dashboard, use the search function in the Portability Log, and more.

[Hard Delete Records in Privacy Center](#)

You can now hard delete records when running a retention or RTBF policy. When you enable the Hard Delete option, the record isn't placed in the recycle bin, which requires a wait period of 15 days before deleting or manually emptying the recycle bin.

Track Consent Preferences for Multiple Brands

Store customer consent preferences for multiple brands that exist in one Salesforce org. Use the Business Brand object to identify different brands that share a parent brand. Then use the Customer and Seller objects to define unique relationships to these brands.

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

SEE ALSO:

[SOAP API Developer Guide: Consent Management Objects \(can be outdated or unavailable during release preview\)](#)

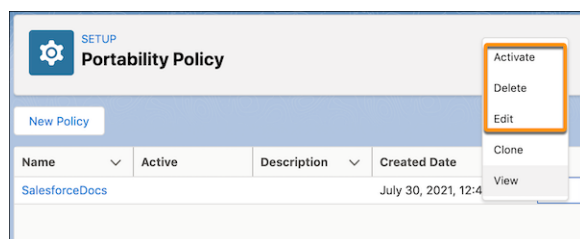
Manage Portability Policies with Feature Enhancements

The Portability Policy dashboard you already know and love has new functionalities. Now you can activate, edit, and delete inactive policies, run policies directly from the dashboard, use the search function in the Portability Log, and more.

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

Who: To use this feature in Privacy Center, you need the ModifyAllData and PrivacyCenter permissions.

How: From the Privacy Center dashboard, under Portability Policies, click **View All** to see the changes.



SEE ALSO:

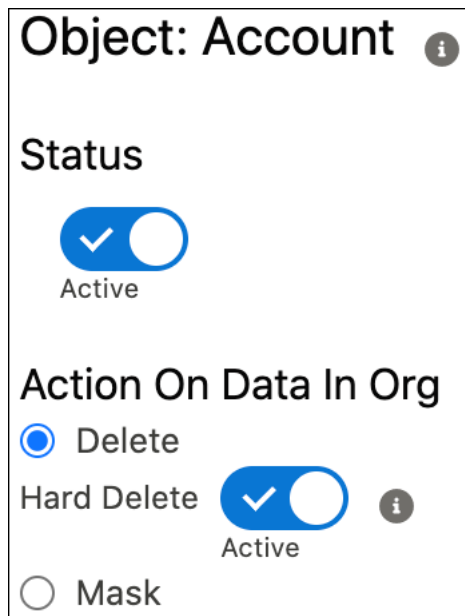
[Salesforce Help: Create a Portability Policy \(can be outdated or unavailable during release preview\)](#)

Hard Delete Records in Privacy Center

You can now hard delete records when running a retention or RTBF policy. When you enable the Hard Delete option, the record isn't placed in the recycle bin, which requires a wait period of 15 days before deleting or manually emptying the recycle bin.

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

How: Both the policy administrator and the user connected to Privacy Center must have the Bulk API Hard Delete permission enabled for their profile. In the policy editor, choose the object to delete. Under Action On Data in Org, turn on Hard Delete.



Object: Account ⓘ

Status

☒ Active

Action On Data In Org

☒ Delete

Hard Delete ☒ ⓘ
Active

☐ Mask

SEE ALSO:

[Knowledge Article: Activation of Bulk API Hard Delete on System Administrator Profile](#)

Salesforce Shield

Shield Platform Encryption offers support for more Financial Services Cloud fields. Event Monitoring delivers better Transaction Security notification emails and four new Event Log File types. You can append only new data to Event Monitoring Analytics app datasets for more efficient updates (beta). Get more granular control over Field Audit Trail retention policies. And Einstein Data Detect (generally available) joins the Shield family, offering a faster way to find sensitive data no matter where it's entered into your org.

IN THIS SECTION:

[Einstein Data Detect](#)

The newest addition to the Shield family, Einstein Data Detect finds sensitive data across your org and helps you plan your next security and privacy steps.

[Event Monitoring](#)

Transaction Security email notifications contain more trigger event detail. Append only new data to Event Monitoring Analytics app datasets for more efficient daily dataset updates (beta). New event log file types help you analyze flow trends, monitor CORS violation records, audit installed managed packages that use named credentials, and monitor Bulk API 2.0 usage and performance.

[Field Audit Trail](#)

When you set a retention policy on an object, Salesforce no longer sets the same policy for a different object with a similar key prefix.

[Shield Platform Encryption](#)

Bring even more security to Financial Services Cloud data with encryption at rest for deal and interaction fields.

Einstein Data Detect

The newest addition to the Shield family, Einstein Data Detect finds sensitive data across your org and helps you plan your next security and privacy steps.

IN THIS SECTION:

[Find Sensitive Data with Einstein Data Detect \(Generally Available\)](#)

Sometimes users make data entry mistakes, or customers mistakenly provide personally identifiable information (PII). When sensitive data ends up where it doesn't belong, it's hard to meet data privacy and security obligations. Einstein Data Detect helps you quickly find sensitive data such as credit card numbers and social security numbers no matter where it's entered in your org. You can then apply data classification categories right from the UI and adjust privacy and security controls as necessary.

Find Sensitive Data with Einstein Data Detect (Generally Available)

Sometimes users make data entry mistakes, or customers mistakenly provide personally identifiable information (PII). When sensitive data ends up where it doesn't belong, it's hard to meet data privacy and security obligations. Einstein Data Detect helps you quickly find sensitive data such as credit card numbers and social security numbers no matter where it's entered in your org. You can then apply data classification categories right from the UI and adjust privacy and security controls as necessary.

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

Who: The Einstein Data Detect managed package is available to customers who have purchased the Salesforce Shield add-on subscription.

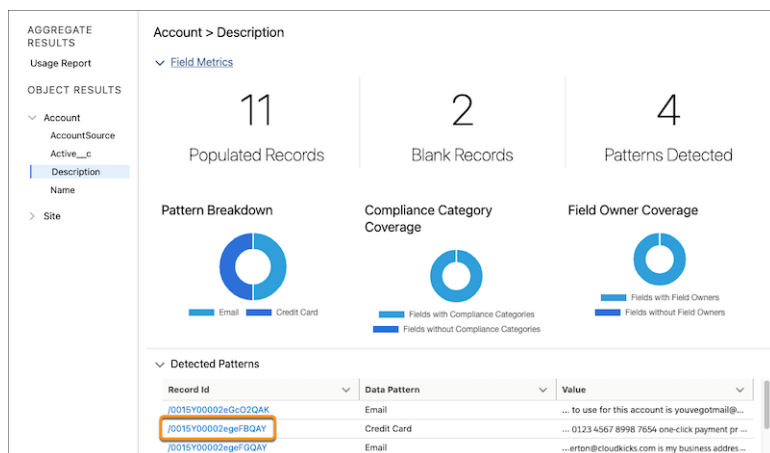
Why: Einstein Data Detect helps you find misplaced data in fields, attachments, and documents. Built with platform-native technology, you can:

- Determine the sensitivity of a field based on its contents and categorize it accurately.
- Categorize data classification metadata in bulk without having to store your data in a third-party service.
- Identify which other Salesforce security and privacy products can help you meet your security and privacy requirements.

For example, review detected fields and decide which to encrypt with Shield Platform Encryption or mask with Data Mask. Pair your results with Privacy Center to automatically create Deletion, Masking, and Retention templates for specific categories of data. And if you know that specific fields contain PII, you can create Transaction Security policies that place guardrails on reports that contain those fields.

How: Install the Einstein Data Detect managed package in your production or sandbox environment. From the App Launcher, select **Einstein Data Detect**. First, create a Data Detect Policy. On the Policies page, select an object and choose the data patterns and fields you want the app to scan for. Enable the object for scanning and save your work. Repeat this step for as many objects as you want within your policy. When you're ready to start scanning, click **Activate Policy** and then **Scan**.

The app refreshes with your results. Results dashboards breakdown scan results by record, data patterns, and data categorization for easy data reviews. Drill in to discovered records to learn more about your data and respond accordingly.



See more detailed information under the Field Results section on each object. Here, you can add data classification categories to fields right in the UI.

The screenshot shows the 'Data Classifications' configuration page. It includes a search bar for 'Field Owner', a list of 'Available' compliance categories (PII, PCI, COPPA, CCPA), and a list of 'Selected' categories (HIPAA, GDPR). There are also dropdowns for 'Sensitivity Level' (set to Internal) and 'Field Usage' (set to Active), along with a 'Save' button.

SEE ALSO:

[Salesforce Help: Einstein Data Detect \(can be outdated or unavailable during release preview\)](#)

Event Monitoring

Transaction Security email notifications contain more trigger event detail. Append only new data to Event Monitoring Analytics app datasets for more efficient daily dataset updates (beta). New event log file types help you analyze flow trends, monitor CORS violation records, audit installed managed packages that use named credentials, and monitor Bulk API 2.0 usage and performance.

IN THIS SECTION:

[Append New Data to Event Monitoring Analytics App Datasets \(Beta\)](#)

Now you can configure your app to add only the data that's new since the last dataset update. This change reduces network loads, can speed up dataflow jobs for large datasets, and helps you stay within your limits. No more worrying about updates leading to duplicated data across multiple datasets and counting against your row count limits.

[Get More Informative Transaction Security Policy Notifications](#)

Email notifications for triggered Transaction Security policies include more detail. In addition to the policy name and events that triggered the policy, you now see the policy's ID and related org ID and user ID. More information helps you identify affected orgs and streamline investigations.

Analyze Your Flows in the Flow Execution Event Type

To analyze the usage trends and performance health of your flows, access the new Flow Execution event type in the `EventLogFile` object.

Get Information About CORS Violation Records in the EventLogFile

The new CORS Violation Record event type in the `EventLogFile` object captures information about Cross-Origin Resource Sharing (CORS) violations for Lightning apps. Cross-origin requests to Lightning apps are blocked unless the request comes from a URL listed in your CORS allowlist. Use this event type to monitor CORS violation records and help you decide if your CORS allowlist requires an update before the Enforce CORS Allowlist for Lightning Apps release update is enforced. Currently, the CORS allowlist in Setup isn't enforced for Lightning apps.

Get the Namespace of Installed Managed Packages That Access Named Credentials

Capture information about Apex callouts that use named credentials as their endpoints with the `EventLogFile` object's new Named Credential event type. This event type is ideal for auditing the installed managed packages that use named credentials. For example, you're sometimes required to create a named credential as part of the installation of a managed package from an AppExchange partner. However, in previous Salesforce releases, you didn't have a way to determine whether other packages also used the named credential, which was a potential security risk. This new event type allows you to track all packages that use a named credential and investigate packages you don't recognize.

Review Bulk API 2.0 Workload Information

The new Bulk API 2.0 event log file type helps you query Bulk API 2.0 job information. Previously, Bulk API 2.0 information was available only on the Bulk Data Load Jobs page in Setup. Use the new event type to track how long Bulk API 2 jobs take to complete, what kinds of data they process and how much, who runs jobs, and more.

Review Threat Detection Data in Security Center (Generally Available)

Now generally available, Threat Detection integration with Security Center helps you understand threat event trends and plan your responses accordingly. You can view aggregated data about threat events for single and multiple orgs, and drill in to event details right from the Security Center app.

Append New Data to Event Monitoring Analytics App Datasets (Beta)

Now you can configure your app to add only the data that's new since the last dataset update. This change reduces network loads, can speed up dataflow jobs for large datasets, and helps you stay within your limits. No more worrying about updates leading to duplicated data across multiple datasets and counting against your row count limits.

Where: This change applies to 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: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: To enable this beta feature, contact Salesforce. Then, in the configuration wizard, select **Add only new event log file data to existing datasets?**. The app then adds only the new data and deletes all data that's dated outside of your specified retention period.

This configuration is available only in new apps. To add it to an existing app, delete the app, and then recreate it. Enable the **Add only new event log file data to existing datasets?** setting in the configuration wizard.

Get More Informative Transaction Security Policy Notifications

Email notifications for triggered Transaction Security policies include more detail. In addition to the policy name and events that triggered the policy, you now see the policy's ID and related org ID and user ID. More information helps you identify affected orgs and streamline investigations.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

[Salesforce Help: Enhanced Transaction Security Actions and Notifications \(can be outdated or unavailable during release preview\)](#)

Analyze Your Flows in the Flow Execution Event Type

To analyze the usage trends and performance health of your flows, access the new Flow Execution event type in the EventLogFile object.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This event is available in API version 53.0 and later but not in the Event Monitoring Analytics app.

Who: This change is available to customers who purchased the Salesforce Shield or Salesforce Event Monitoring add-on subscription and use the EventLogFile object data to monitor events.

SEE ALSO:

[Object Reference: Flow Execution Event Type \(can be outdated or unavailable during release preview\)](#)

Get Information About CORS Violation Records in the EventLogFile

The new CORS Violation Record event type in the `EventLogFile` object captures information about Cross-Origin Resource Sharing (CORS) violations for Lightning apps. Cross-origin requests to Lightning apps are blocked unless the request comes from a URL listed in your CORS allowlist. Use this event type to monitor CORS violation records and help you decide if your CORS allowlist requires an update before the Enforce CORS Allowlist for Lightning Apps release update is enforced. Currently, the CORS allowlist in Setup isn't enforced for Lightning apps.

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. It's available for free for two releases because it's intended to help you prepare for the enforcement of the Enforce CORS Allowlist for Lightning Apps release update.

How: CORS enables web browsers to request resources from origins other than their own. For example, using CORS, JavaScript code at `https://www.example.com` can request a resource from `https://www.salesforce.com`.

The Event Log File Browser application is the easiest tool to download event monitoring data. See [these instructions](#).

SEE ALSO:

[Enforce CORS Allowlist for Lightning Apps \(Release Update\)](#)

[Share Resources with Browser Extensions](#)

[Object Reference: EventLogFile Supported Event Types \(can be outdated or unavailable during release preview\)](#)

Get the Namespace of Installed Managed Packages That Access Named Credentials

Capture information about Apex callouts that use named credentials as their endpoints with the `EventLogFile` object's new Named Credential event type. This event type is ideal for auditing the installed managed packages that use named credentials. For example, you're sometimes required to create a named credential as part of the installation of a managed package from an AppExchange partner. However, in previous Salesforce releases, you didn't have a way to determine whether other packages also used the named credential, which was a potential security risk. This new event type allows you to track all packages that use a named credential and investigate packages you don't recognize.

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 Named Credential event type is free to all customers. Customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions can use the `EventLogFile` object to monitor events.

SEE ALSO:

[Salesforce Help: Named Credentials \(can be outdated or unavailable during release preview\)](#)

[Object Reference: EventLogFile Supported Event Types](#)

[Apex Developer Guide: Named Credentials as Callout Endpoints](#)

Review Bulk API 2.0 Workload Information

The new Bulk API 2.0 event log file type helps you query Bulk API 2.0 job information. Previously, Bulk API 2.0 information was available only on the Bulk Data Load Jobs page in Setup. Use the new event type to track how long Bulk API 2 jobs take to complete, what kinds of data they process and how much, who runs jobs, and more.

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

Who: The Bulk API 2.0 event type is free to all customers. Customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions can use the `EventLogFile` object to monitor events.

SEE ALSO:

[Bulk API 2.0](#)

[Object Reference: Bulk API 2.0 Event Type \(can be outdated or unavailable during release preview\)](#)

Review Threat Detection Data in Security Center (Generally Available)

Now generally available, Threat Detection integration with Security Center helps you understand threat event trends and plan your responses accordingly. You can view aggregated data about threat events for single and multiple orgs, and drill in to event details right from the Security Center app.

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

Who: This change is available to customers who purchase Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

[Monitor Security Threats with Centralized Threat Detection \(Generally Available\)](#)

Field Audit Trail

When you set a retention policy on an object, Salesforce no longer sets the same policy for a different object with a similar key prefix.

IN THIS SECTION:

[Retention Policy Now Associated with Only One Custom Object](#)

Previously, a retention policy could be associated with both the custom object that you explicitly set it for and another custom object with a similar key prefix. This behavior no longer happens.

Retention Policy Now Associated with Only One Custom Object

Previously, a retention policy could be associated with both the custom object that you explicitly set it for and another custom object with a similar key prefix. This behavior no longer happens.

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

Who: Field Audit Trail is available to customers who purchased a Salesforce Shield or Salesforce Field Audit Trail add-on subscription.

How: A key prefix is the three-character code in an object ID that specifies the object type, such as 001 for Account. Let's say you previously created two custom objects, Object1 and Object2, whose key prefixes differ only in their case sensitivity, such as a0B and a0b. You then defined a retention policy for Object1 but not Object2. Salesforce used to associate the same retention policy with Object2. Starting in this release, Salesforce no longer associates the policy with Object2.

SEE ALSO:

[Salesforce Help: Field Audit Trail \(can be outdated or unavailable during release preview\)](#)

Shield Platform Encryption

Bring even more security to Financial Services Cloud data with encryption at rest for deal and interaction fields.

IN THIS SECTION:

[Encrypt More Financial Services Cloud Data](#)

You take your clients' confidentiality seriously and so do we. Now you can add an extra layer of protection to deal information and data discussed in your interactions with Financial Services Cloud customers.

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You take your clients' confidentiality seriously and so do we. Now you can add an extra layer of protection to deal information and data discussed in your interactions with Financial Services Cloud customers.

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

Who: This change applies to editions that have both Shield Platform Encryption and Financial Services Cloud add-on subscriptions.

Why: You can now encrypt these Financial Services Cloud fields.

- Financial Deal—Description, Financial Deal Code, Name
- Financial Deal Interaction—Comment
- Financial Deal Interaction Summary—Comment
- Interaction—Description, Name
- Interaction Summary—Next Steps, Meeting Notes, Title
- Interaction Summary Discussed Account—Comment

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit**, and select the fields you want to encrypt.

SEE ALSO:

[Increase Security for Interaction Summaries and Financial Deals with Shield Platform Encryption](#)

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

Security Center

Centralized Threat Detection is now generally available. Create in-app and email alerts to instantly learn about changes to security settings that you want to monitor. Parse metric data with filters for the results view.

IN THIS SECTION:

[Monitor Security Threats with Centralized Threat Detection \(Generally Available\)](#)

The Threat Detection integration powered by Event Monitoring for Security Center is now generally available. Let machine learning identify and provide data on four types of threats across your connected tenants in real time.

[Create Alerts for Changes to Your Security Configuration](#)

Automate security monitoring by setting up in-app and email alerts for conditions of your choosing. Indicate what changes you want to be alerted of, how you want to be alerted, and who receives the alert.

[Explore Metric Data with Detail View Filters](#)

Quickly find information you need by applying filters to metric detail pages.

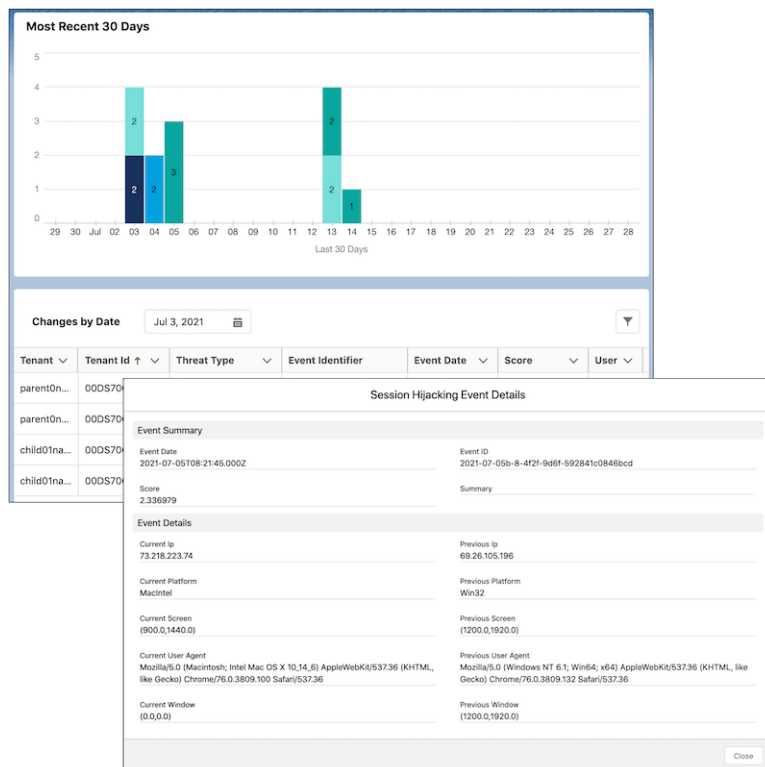
Monitor Security Threats with Centralized Threat Detection (Generally Available)

The Threat Detection integration powered by Event Monitoring for Security Center is now generally available. Let machine learning identify and provide data on four types of threats across your connected tenants in real time.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

Who: This change is available to customers who purchase Security Center and Event Monitoring add-on subscriptions.

How: From the Security Center dashboard in your parent tenant, click Threat Detection. Below the 30-day summary graph, choose a date. To see the details of a detected event, click the Threat Identifier value. The four supported security threats are: Credential Stuffing, API Anomaly, Session Hijacking, and Report Anomaly.



SEE ALSO:

[Salesforce Help: Review Threat Detection Events \(can be outdated or unavailable during release preview\)](#)

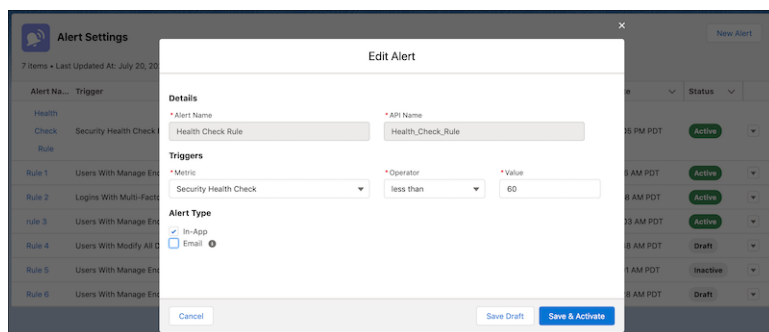
Create Alerts for Changes to Your Security Configuration

Automate security monitoring by setting up in-app and email alerts for conditions of your choosing. Indicate what changes you want to be alerted of, how you want to be alerted, and who receives the alert.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

Who: This change is available to customers who purchase Security Center and Event Monitoring add-on subscriptions.

How: From the Security Center app in your parent tenant, click the Alert Settings tab. Click **New Alert**, and follow the instructions to define your alert details like triggers and thresholds. For example, receive an alert if the number of users with the Modify All Data permission in any tenant reaches more than five.



SEE ALSO:

[Salesforce Help: Create Alerts for Security Changes \(can be outdated or unavailable during release preview\)](#)

Explore Metric Data with Detail View Filters

Quickly find information you need by applying filters to metric detail pages.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

How: To change which results are displayed on a metric detail page, below the summary graph, click the filter button. Choose your filter conditions, and click **Apply** to see the filtered metric data.

SEE ALSO:

[Salesforce Help: Review Detailed Metric Data \(can be outdated or unavailable during release preview\)](#)

Other Security Changes

The CORS allowlist now supports browser extension requests to Salesforce REST resources. Prevent data loss and recover quickly from incorrect data updates or integration errors with the new Backup and Restore feature.

IN THIS SECTION:

[Prevent Data Loss with Backup and Restore \(Generally Available\)](#)

Protect your organization from permanent data loss and corruption by automatically generating backups. With just a few clicks, your data is backed up and can be restored quickly in the event of integration errors, malicious attempts, or incorrect data updates. Use Backup & Restore to prevent data loss, recover from data incidents quickly, and simplify your overall data management strategy.

[Share Resources with Browser Extensions](#)

Add browser extensions to your cross-origin resource sharing (CORS) list to allow requests for Salesforce REST resources. Previously, the CORS allowlist supported only websites and IP addresses. For example, you can now allow an appointment management browser extension to view and work with your Salesforce records. Browser extensions that aren't on your CORS allowlist are blocked from requesting resources.

Prevent Data Loss with Backup and Restore (Generally Available)

Protect your organization from permanent data loss and corruption by automatically generating backups. With just a few clicks, your data is backed up and can be restored quickly in the event of integration errors, malicious attempts, or incorrect data updates. Use Backup & Restore to prevent data loss, recover from data incidents quickly, and simplify your overall data management strategy.

Where: Backup and Restore is available for Lightning Experience in Professional, Enterprise, Unlimited, and Performance editions.

Who: Backup & Restore requires a platform license and a permission.

Why: With Backup & Restore, you can protect your organization against incorrect data updates, integration execution issues, malicious actors, and ransom ware attacks. Backup & Restore provides:

- Custom and Standard Object backups
- Daily incremental backups
- Backup in the same region
- Backup-to-Current-State comparisons
- Record previews before restoring
- Restoration to original org
- Backup dashboard & statistics
- Run logs on which to build custom triggers and flows

How: When you log in to Backup & Restore, the dashboard displays all recent backups and API activity. If it's your first time using Backup & Restore, use the Settings tab to provision resources, connect to Backup & Restore by enabling OAuth, or test end-to-end connectivity. These are settings you set just once during setup.

1. To create a backup policy, on the Backup tab, click the **Data** tile, and click **Next**. You'll see all the objects that can be backed up in this tab. Click **Save** after activating and selecting Related Objects.
2. To restore a backup, on the Restore tab, click the **Data** tile, and click **Next**. Select the backup you want to restore from, then click **Restore** and then **Confirm**.
3. To get information on previous backup and restore activity, click the **Logs** tab.

SEE ALSO:

[Salesforce: Protect Data Against Loss and Corruption](#)

Share Resources with Browser Extensions

Add browser extensions to your cross-origin resource sharing (CORS) list to allow requests for Salesforce REST resources. Previously, the CORS allowlist supported only websites and IP addresses. For example, you can now allow an appointment management browser extension to view and work with your Salesforce records. Browser extensions that aren't on your CORS allowlist are blocked from requesting resources.

Where: This change applies to Salesforce Classic and Lightning Experience in Developer, Enterprise, Performance, and Unlimited Editions. It also applies to Professional Edition with API access enabled.

How: From Setup, in the Quick Find box, enter `CORS`, and then select **CORS**.

SEE ALSO:

[Salesforce Help: Perform Cross-Origin Requests from Web Browsers \(can be outdated or unavailable during release preview\)](#)

[Get Information About CORS Violation Records in the EventLogFile](#)

Service

Take advantage of a wide range of new, intuitive Service Cloud features that help you and your team deliver efficient, flexible service. Try out Incident Management, which allows your team to diagnose root causes and resolve major incidents faster while creating a better customer experience. Use it to empower your service teams to quickly classify and prioritize work, assign the right experts, and streamline communication with customers. Workforce Engagement offers a queue-based workflow for planning and staffing tools so you can access the business analytics that you need faster. And set up Service Cloud Voice with Partner Telephony more easily with the new prescriptive setup experience, which includes templates and menus to help you create your contact center and sync it with your telephony provider.

IN THIS SECTION:

[Incident Management](#)

When an urgent incident affects your customers, stay calm and let Incident Management do the heavy lifting to eliminate potential complications before they become showstoppers. Use Incident management tools to track, diagnose, and prevent service interruptions from reoccurring -- all within Salesforce.

[Service Setup](#)

Let the Service Setup Assistant handle all the key Service Cloud setup tasks for you. In addition to the other tasks it completes, the Assistant now turns on Salesforce Surveys and provides two sample surveys that you can use to measure customer satisfaction.

[Channels](#)

Create your contact center and sync it with your telephony provider more easily with the improved Voice setup experience. Upgrade the customer service experience with enhanced contact flows and a unified, robust way to route voice calls, chats, and messages to the correct agents. End Messaging sessions in bulk. For Service Chat, Salesforce admins choose what can be accessed with the findOrCreate API for more security.

[Workforce Engagement](#)

Make data-driven planning and staffing decisions in an Omni queue-based workflow. Workload history, intelligent forecasting, Omni-Channel planning, and scheduling rules now work with skills-based workflows and Omni queue-based workflows. Streamline mapping of job profiles to queues with the new Configuration App. Create shifts in bulk straight from your Omni-Channel plan, and speed up the process further with shift templates. Filter your workload history by text or picklist fields on a lookup entity.

[Routing](#)

Efficiently route work to the most qualified agents with Omni-Channel Flow. To save time building the flow, start with a template.

[Einstein for Service](#)

Help your agents respond to customer queries quickly and consistently with Einstein for Service Cloud. We refined the template generation process for Reply Recommendations to remove short or repetitive replies and focus Einstein's predictive powers on the more complex parts of conversations.

[Knowledge](#)

We expanded accessibility to knowledge article versions with a new list layout.

[Cases](#)

Easily add tables to emails and customize their appearance. See two reminders about the changed enforcement dates for new email threading behavior and a default No-Reply address.

Incident Management

When an urgent incident affects your customers, stay calm and let Incident Management do the heavy lifting to eliminate potential complications before they become showstoppers. Use Incident management tools to track, diagnose, and prevent service interruptions from reoccurring -- all within Salesforce.

IN THIS SECTION:

[Diagnose, Track, and Prevent Service Interruptions with Incident Management](#)

Get ready for a service team that manages interruptions like superheroes! When a widespread incident occurs, use Incident Management to analyze the cause, streamline agent operations, and minimize downtime. Plus, change management features help get meaningful changes implemented to prevent incidents from reoccurring.

Diagnose, Track, and Prevent Service Interruptions with Incident Management

Get ready for a service team that manages interruptions like superheroes! When a widespread incident occurs, use Incident Management to analyze the cause, streamline agent operations, and minimize downtime. Plus, change management features help get meaningful changes implemented to prevent incidents from reoccurring.

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

Why: Incident management helps your escalation teams track large-scale disruptions and delegate tasks to the right agent for the job to ensure your company delivers on customer expectations. They can log a problem to find the root cause of a service interruption or other major productivity blocker. And the change manager gives escalation specialists a way to take the steps necessary to ensure the problem is never an issue for your org again. More time spent providing value to your customers means more revenue for your company, and better brand reputation among your customers.

After the escalation team decides on the best fix, your agents can create related change requests to get the fix approved and the incident resolved.

How: All new Service Cloud orgs can access Incident Management right out of the box. To turn it on for existing orgs, find Incident Management in the Setup search bar and turn the feature toggle on. You can view more detailed information about the new Incident Management objects from the Object Manager once they're created.

Service Setup

Let the Service Setup Assistant handle all the key Service Cloud setup tasks for you. In addition to the other tasks it completes, the Assistant now turns on Salesforce Surveys and provides two sample surveys that you can use to measure customer satisfaction.

IN THIS SECTION:

[Get Sample Surveys from the Service Setup Assistant](#)

The Service Setup Assistant now enables Salesforce Surveys for you. Get feedback from your customers on their service experience with the Customer Satisfaction and Net Promoter Score sample surveys. We also give you two email templates that you can use to share the surveys with customers.

Get Sample Surveys from the Service Setup Assistant

The Service Setup Assistant now enables Salesforce Surveys for you. Get feedback from your customers on their service experience with the Customer Satisfaction and Net Promoter Score sample surveys. We also give you two email templates that you can use to share the surveys with customers.

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

How: To get started with Service, go to the **Service Setup Assistant** page in Setup. If it's your first time using the Assistant, turn it on and follow the prompts to let the Assistant complete key setup tasks for you, including enabling Surveys.

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. This enables Surveys and gives you the two sample surveys.

To use the Customer Satisfaction and Net Promoter Score sample surveys, go to the Surveys page in Setup. Create a copy of a sample survey for your own use. View your email templates on the Email Templates tab.

SEE ALSO:

[Salesforce Help: Features Included in the Service Setup Assistant \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Send Survey Invitations by Email \(can be outdated or unavailable during release preview\)](#)

Channels

Create your contact center and sync it with your telephony provider more easily with the improved Voice setup experience. Upgrade the customer service experience with enhanced contact flows and a unified, robust way to route voice calls, chats, and messages to the correct agents. End Messaging sessions in bulk. For Service Chat, Salesforce admins choose what can be accessed with the findOrCreate API for more security.

IN THIS SECTION:

[Voice](#)

Set up Service Cloud Voice with Partner Telephony more easily with the new prescriptive setup experience, which includes templates and menus to help you create your contact center and sync it with your telephony provider. We've also made it easier for service agents to find the info they need—agents can enjoy global search for voice calls, faster search for agent-to-agent transfers, and customized screen pops of related records. Preserve the quality of your caller experience with enhanced contact flows, Omni-Channel flow-based routing, and email alerts about configuration issues.

[Messaging](#)

Dynamically route messaging sessions with Omni-Channel flows. Close multiple messaging sessions with a few clicks.

[Chat](#)

Manage object accessibility with two new allowlists. Make smoother transitions between sessions with transfers and conferences.

Voice

Set up Service Cloud Voice with Partner Telephony more easily with the new prescriptive setup experience, which includes templates and menus to help you create your contact center and sync it with your telephony provider. We've also made it easier for service agents to find the info they need—agents can enjoy global search for voice calls, faster search for agent-to-agent transfers, and customized screen pops of related records. Preserve the quality of your caller experience with enhanced contact flows, Omni-Channel flow-based routing, and email alerts about configuration issues.

IN THIS SECTION:

[Streamline Your Partner Telephony Contact Center Setup \(Prescriptive Setup\)](#)

Connect your existing contact center to your partner telephony accounts in fewer steps. After you install your partner telephony provider's managed package from AppExchange, use clicks and not code to streamline your setup and share information across accounts. To cut down on repetitive tasks, users are also synced across your Salesforce contact center and your partner telephony account.

[Simplify Your Amazon Partner Telephony Setup](#)

Integrate your Amazon Connect contact center faster with the Service Cloud Voice with Amazon Partner Telephony Lightning application. Minimize manual setup with a custom Voice Call record page that includes standard Voice components. Give your agents a seamless experience with Omni-Channel already baked in and ready to use.

[Route Calls with Omni-Channel Flows \(Beta\)](#)

Define your routing rules in Salesforce to dynamically route calls to the correct agent in the same place that you configure routing rules for your other channels. Give supervisors real-time queue metrics about voice calls in Omni Supervisor. Customize the agent experience, such as using screen pops to provide the agent with more context about the conversation when they accept a call.

[Analyze Service Calls in the Einstein Conversation Insights Dashboard](#)

Review service call stats such as keyword mentions in the new Einstein Conversation Insights dashboard for Service. Previously, service and sales calls were combined in one dashboard. Supervisors can apply service-specific filters to focus on the data they care about.

[Get Actionable Call Insights with Einstein Conversation Insights for Partner Telephony \(Pilot\)](#)

Einstein Conversation Insights is now supported by Service Cloud Voice with Partner Telephony and Service Cloud Voice with Partner Telephony from Amazon Connect. Give supervisors the data to coach agents on customer interactions, listen to recorded calls with talk tracks, and view dashboards. You can also review service call stats such as keyword mentions in the new Einstein Conversation Insights dashboard for Service.

[Improve Reporting with Consistent Call Statuses](#)

To enable better reporting and automation, we removed inconsistent call statuses, also known as call dispositions, across all call types: inbound, outbound, transferred, and queued callbacks. All call types now use the same call statuses: New, In Progress, and Completed. Regardless of call type, the call status switches to Completed after the call ends. When an agent attempts to transfer a call, the call status is set to Completed, not Transferred—Transferred is no longer used. If needed, rework your workflows based on call statuses.

[Define Omni-Channel Statuses for Missed and Declined Calls](#)

Keep the agents visible in Omni-Channel Supervisor by setting the presence statuses when agents miss or decline calls. Previously, when an agent missed or declined a call, the agent went offline in Omni-Channel and was no longer visible in Omni-Channel Supervisor.

[Keep Your Lambda Functions Warm and Other Enhancements](#)

To prevent call delays in Service Cloud Voice caused by Lambda function cold starts, warm up your Lambda functions by leveraging an out-of-the-box integration with AWS EventBridge. Your Lambda changes are kept warm, saving you maintenance time and keeping your business running smoothly. You can also easily roll back Lambda changes made during a contact center upgrade with contact center versioning.

[Find Voice Calls Quickly with Global Search](#)

Search for a call based on call fields, such as phone number, caller name, and voice call ID. To reduce the noise of a global search, filter the results to voice calls only. To ensure that you found the right call, hover over the voice call ID to view the details.

[Speed Up Agent Troubleshooting with Downloadable Call Logs](#)

Save your agents time troubleshooting call issues with detailed logs that they can easily download and send to Salesforce Customer Support. If a disruption occurs, the agent can simply download the log from the Omni-Channel utility and save the debugging for someone else.

[Transfer Callers to Agents with Search](#)

It's easier for agents to transfer calls, even if they don't remember the other agent's name. Now agents can search for an agent, queue, or phone number, or scroll through a list of agents to jog their memory. Your agents can also see who's available to help the customer before transferring the call.

[Match Callers to End User Records with Phone Channels \(Beta\)](#)

With new phone channels, you can configure call routing for voice calls with Omni-Channel flows and queue routing, and determine how End User records are created. When a customer dials in, use the caller phone number and phone channel number to create an End User record. After an agent identifies the caller and associates the End User record with a Contact, all future calls from that number are associated with that contact.

[Use Desk Phones with Service Cloud Voice \(Generally Available\)](#)

Use the hardphone of your choice, such as a desk phone or a mobile phone, to talk with customers.

[Improve the Supervisor Reporting Experience with Recognizable Usernames](#)

Make it easier for supervisors and admins to view reports and search for agents with recognizable AWS usernames. Now when you add a user to your contact center, part of their Salesforce username is added to their AWS Connect username. For example, if John Liu's Salesforce username is john.liu@salesforce.com, his AWS Connect username is john.liu.

[Monitor Call Quality with Mean Opinion Scores](#)

Measure the quality of your voice calls with mean opinion scores (MOS) added to your voice call records. Use MOS to stay one step ahead of possible network degradations or call quality issues.

[Monitor Service Cloud Voice on the Trust Site](#)

View the status of the Service Cloud Voice service in real time on the Salesforce trust site. See whether the Service Cloud Voice call and transcription service is available or undergoing a service disruption, performance degradation, or maintenance.

[Get Email Alerts About Voice Issues \(Pilot\)](#)

Get notified by email when it's time to take steps to avoid problems with your Service Cloud Voice implementation. For example, get an email if you reach a service limit or if your contact center's interactive voice response (IVR) isn't configured correctly.

[Voice Users Must Agree to Being Recorded](#)

Starting this release, all users with access to Service Cloud Voice call recordings must agree to the call recording terms and conditions.

[Respect Customer Privacy with Auto-Paused Call Transcription](#)

When a service agent pauses the recording of a call or when a caller is placed on hold, call transcription is now also paused. When recording resumes or the caller is no longer on hold, transcription resumes. Previously, transcription wasn't paused during recording pauses or holds.

[Improve Caller Experiences with Enhanced Contact Flows](#)

To improve your customers' interactions with the contact center, we enhanced the contact flows provided by Salesforce. To inform callers what's happening while they're waiting, we added more prompts to the existing flows. Calls that encounter issues now include informative logging. These changes don't affect existing Amazon contact centers.

Streamline Your Partner Telephony Contact Center Setup (Prescriptive Setup)

Connect your existing contact center to your partner telephony accounts in fewer steps. After you install your partner telephony provider's managed package from AppExchange, use clicks and not code to streamline your setup and share information across accounts. To cut down on repetitive tasks, users are also synced across your Salesforce contact center and your partner telephony account.

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

How: When you add or remove a user in your contact center, the user is also added to or removed from your partner account, including details like the user's name and email address.

SEE ALSO:

[Salesforce Help: Create Your Partner Telephony Contact Center \(can be outdated or unavailable during release preview\)](#)

Simplify Your Amazon Partner Telephony Setup

Integrate your Amazon Connect contact center faster with the Service Cloud Voice with Amazon Partner Telephony Lightning application. Minimize manual setup with a custom Voice Call record page that includes standard Voice components. Give your agents a seamless experience with Omni-Channel already baked in and ready to use.


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

How: From AppExchange, install the Service Cloud Voice with Amazon Partner Telephony managed package.

Route Calls with Omni-Channel Flows (Beta)

Define your routing rules in Salesforce to dynamically route calls to the correct agent in the same place that you configure routing rules for your other channels. Give supervisors real-time queue metrics about voice calls in Omni Supervisor. Customize the agent experience, such as using screen pops to provide the agent with more context about the conversation when they accept a call.

Where: This change applies to Lightning Experience in Enterprise and Unlimited 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: In addition to providing information about Omni-Channel agents and queues, Omni Supervisor provides supervisors with real-time information about voice calls, including position, call type, and wait time.

Lightning Service C...

Omni Supervisor

Contact Center App

Product setup issues

Agents

Queues Backlog

Assigned Work

Skills Backlog

<

Billing Voice

PRIORITY #1 | WORK SIZE : 100%

AVAILABLE AGENTS

0

BUSY AGENTS

0

AGENTS AT CAPACITY

0

IDLE AGENTS

0

TOTAL WAITING

3

LONGEST WAIT TIME

1 min 14 s

AVERAGE WAIT TIME

54 s

Clear Filters

POSITION	TYPE	DETAILS	WAIT TIME	REQUESTED TIME
1		+1(688) 571-7526 Aug 4, 2021, 9:24 AM Inbound	1 min 14 s	Aug 4, 2021, 9:24:06 AM
2		+1(747) 301-7510 Aug 4, 2021, 9:24 AM Inbound	50 s	Aug 4, 2021, 9:24:30 AM
3		+1(571) 688-5310 Aug 4, 2021, 9:24 AM Inbound	40 s	Aug 4, 2021, 9:24:40 AM

SEE ALSO:

[Salesforce Help: Complete the Prerequisites to Route Voice Calls \(can be outdated or unavailable during release preview\)](#)

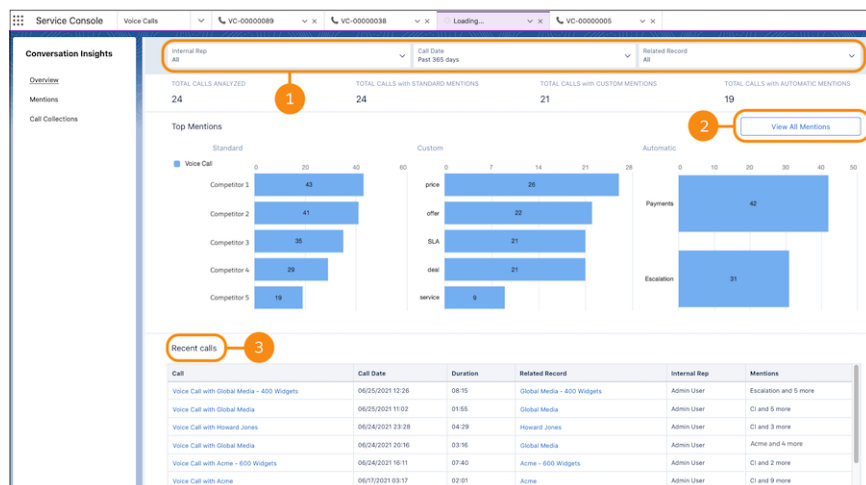
Analyze Service Calls in the Einstein Conversation Insights Dashboard

Review service call stats such as keyword mentions in the new Einstein Conversation Insights dashboard for Service. Previously, service and sales calls were combined in one dashboard. Supervisors can apply service-specific filters to focus on the data they care about.

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

Who: Users with the Conversation Insights for Service permission set can see the Einstein Conversation Insights for Service dashboard. If users have the Conversation Insights for Sales or High Velocity Sales permission sets, they see the Sales dashboard in the Sales Console. Users who have the Service and the Sales permission sets see the Sales dashboard.

How: In the Service Console, click the **Conversation Insights** tab to view the dashboard. The dashboard shows only voice calls made by users with the Conversation Insights for Service permission set.



- Filter calls by rep, call date, and related record type (1).
- View charts of top keyword mentions including competitor and product keywords, customer keywords, and automatic service keywords. To drill into keyword trends, click **View All Mentions** (2).
- Scan a list of recent calls with details about their mentions, date and duration, and participants (3).

Get Actionable Call Insights with Einstein Conversation Insights for Partner Telephony (Pilot)

Einstein Conversation Insights is now supported by Service Cloud Voice with Partner Telephony and Service Cloud Voice with Partner Telephony from Amazon Connect. Give supervisors the data to coach agents on customer interactions, listen to recorded calls with talk tracks, and view dashboards. You can also review service call stats such as keyword mentions in the new Einstein Conversation Insights dashboard for Service.

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

How: Contact your Salesforce account executive to learn more about participating in this pilot.

Improve Reporting with Consistent Call Statuses

To enable better reporting and automation, we removed inconsistent call statuses, also known as call dispositions, across all call types: inbound, outbound, transferred, and queued callbacks. All call types now use the same call statuses: New, In Progress, and Completed. Regardless of call type, the call status switches to Completed after the call ends. When an agent attempts to transfer a call, the call status is set to Completed, not Transferred—Transferred is no longer used. If needed, rework your workflows based on call statuses.

Where: This change applies to Lightning Experience in Enterprise 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.

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: VoiceCall \(can be outdated or unavailable during release preview\)](#)

Define Omni-Channel Statuses for Missed and Declined Calls

Keep the agents visible in Omni-Channel Supervisor by setting the presence statuses when agents miss or decline calls. Previously, when an agent missed or declined a call, the agent went offline in Omni-Channel and was no longer visible in Omni-Channel Supervisor.

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

How: In the Update Status on Decline and Update Status on Timeout presence configuration settings, specify new agent statuses when calls are missed or declined. For example, for timed-out calls, set the status to Missed Call. Previously, Service Cloud Voice ignored these settings and set an agent as offline when missing or declining a call.

Keep Your Lambda Functions Warm and Other Enhancements

To prevent call delays in Service Cloud Voice caused by Lambda function cold starts, warm up your Lambda functions by leveraging an out-of-the-box integration with AWS EventBridge. Your Lambda changes are kept warm, saving you maintenance time and keeping your business running smoothly. You can also easily roll back Lambda changes made during a contact center upgrade with contact center versioning.

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

SEE ALSO:

[Service Cloud Voice Implementation Guide: Keep the InvokeTelephonyIntegrationApiFunction Lambda Function Warm \(can be outdated or unavailable during release preview\)](#)

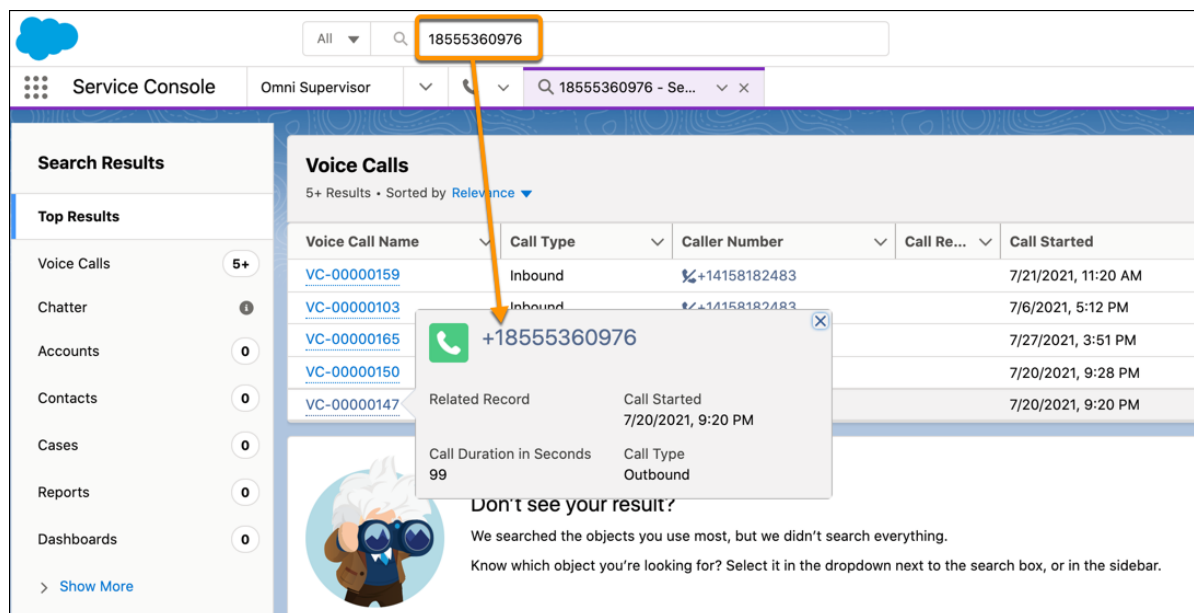
[Salesforce Help: Roll Back a Lambda Update \(can be outdated or unavailable during release preview\)](#)

Find Voice Calls Quickly with Global Search

Search for a call based on call fields, such as phone number, caller name, and voice call ID. To reduce the noise of a global search, filter the results to voice calls only. To ensure that you found the right call, hover over the voice call ID to view the details.

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

How: Enter a search string, and select **Voice Calls** to filter the results. Search shows only the records you have access to. To view call details, hover over the voice call name.



SEE ALSO:

[Salesforce Help: Search for Records from the Global Search Box \(can be outdated or unavailable during release preview\)](#)

Speed Up Agent Troubleshooting with Downloadable Call Logs

Save your agents time troubleshooting call issues with detailed logs that they can easily download and send to Salesforce Customer Support. If a disruption occurs, the agent can simply download the log from the Omni-Channel utility and save the debugging for someone else.

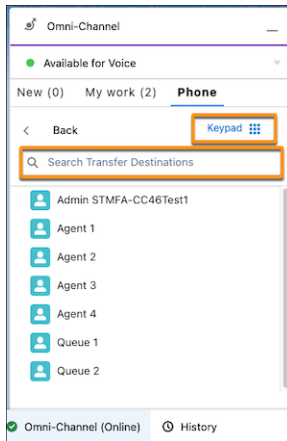
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Transfer Callers to Agents with Search

It's easier for agents to transfer calls, even if they don't remember the other agent's name. Now agents can search for an agent, queue, or phone number, or scroll through a list of agents to jog their memory. Your agents can also see who's available to help the customer before transferring the call.

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

How: To use the new call transfer experience, set up quick connects in the Amazon Connect console. Agents can then see a list of agents and queues, use search, or dial a number from the keypad.



SEE ALSO:

[Salesforce Help: Add Callers or Transfer Calls \(can be outdated or unavailable during release preview\)](#)

Match Callers to End User Records with Phone Channels (Beta)

With new phone channels, you can configure call routing for voice calls with Omni-Channel flows and queue routing, and determine how End User records are created. When a customer dials in, use the caller phone number and phone channel number to create an End User record. After an agent identifies the caller and associates the End User record with a Contact, all future calls from that number are associated with that contact.

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



Note: Match Callers to End User Records is a Beta Service. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Service Terms provided at [Agreements and Terms](#)

Why: Now you can create and manage phone channels like you do your other Service Cloud channels. After you create a phone channel, you can create or reuse the caller's End User record and choose whether to associate it with the number dialed. You can also choose to create or reuse the same End User record regardless of which number the caller dialed.

SEE ALSO:

[Salesforce Help: Configure Caller ID for Your Contact Center \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Phone Channel \(can be outdated or unavailable during release preview\)](#)

Use Desk Phones with Service Cloud Voice (Generally Available)

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. Hardphones are available in orgs where Service Cloud Voice 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.

Who: Agents with the Contact Center Agent permission set can set their phone type to hardphone.

Why: Let agents use the phone that they're most comfortable with. Previously, hardphones weren't supported on Service Cloud Voice with Amazon Connect.

SEE ALSO:

[Salesforce Help: Set Up Desk Phones For Your Contact Center \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use a Desk Phone \(can be outdated or unavailable during release preview\)](#)

Improve the Supervisor Reporting Experience with Recognizable Usernames

Make it easier for supervisors and admins to view reports and search for agents with recognizable AWS usernames. Now when you add a user to your contact center, part of their Salesforce username is added to their AWS Connect username. For example, if John Liu's Salesforce username is john.liu@salesforce.com, his AWS Connect username is john.liu.

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

Monitor Call Quality with Mean Opinion Scores

Measure the quality of your voice calls with mean opinion scores (MOS) added to your voice call records. Use MOS to stay one step ahead of possible network degradations or call quality issues.

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

SEE ALSO:

[Salesforce Help: Monitor Call Quality with Mean Opinion Scores \(can be outdated or unavailable during release preview\)](#)

Monitor Service Cloud Voice on the Trust Site

View the status of the Service Cloud Voice service in real time on the Salesforce trust site. See whether the Service Cloud Voice call and transcription service is available or undergoing a service disruption, performance degradation, or maintenance.

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

How: Visit status.salesforce.com and select your Salesforce instance. On the Current Status tab, look for Service Cloud Voice in the list of services. Optionally, click **Subscribe** to be notified by email about service status changes for your instance.

Get Email Alerts About Voice Issues (Pilot)

Get notified by email when it's time to take steps to avoid problems with your Service Cloud Voice implementation. For example, get an email if you reach a service limit or if your contact center's interactive voice response (IVR) isn't configured correctly.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. The Customer Alerts pilot is available only for customers using Service Cloud Voice with Amazon Connect.

How: Contact your Salesforce account executive to learn more about participating in this pilot.

SEE ALSO:

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

Voice Users Must Agree to Being Recorded

Starting this release, all users with access to Service Cloud Voice call recordings must agree to the call recording terms and conditions.

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

How: The first time a user tries to listen to a call recording or make or receive a call after they update to the new release, they see a message asking them to agree to being recorded. If the user doesn't agree, they can't make or receive calls or listen to call recordings, and they're prompted again the next time they log in.

When an inbound or outbound voice call starts, recording starts automatically, though agents can pause recording if they want to. When a call ends, the recording is available in the call audio player on the voice call record. Any user with access to the voice call record can listen to its recording.

Respect Customer Privacy with Auto-Paused Call Transcription

When a service agent pauses the recording of a call or when a caller is placed on hold, call transcription is now also paused. When recording resumes or the caller is no longer on hold, transcription resumes. Previously, transcription wasn't paused during recording pauses or holds.

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

How: To pause the recording and transcription of a call, click **Recording** in the Omni-Channel utility or the **Recording** radio button in the Phone component. If a caller is placed on hold, transcription is paused for that caller only. Messages in the Conversation component on the voice call record show when transcription was paused and resumed.

Improve Caller Experiences with Enhanced Contact Flows

To improve your customers' interactions with the contact center, we enhanced the contact flows provided by Salesforce. To inform callers what's happening while they're waiting, we added more prompts to the existing flows. Calls that encounter issues now include informative logging. These changes don't affect existing Amazon contact centers.

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

Who: Contact center resources, including contact flows provided by Salesforce, are available to users with the Contact Center Admin permission set.

Why: The contact flow updates go beyond just improving caller experiences. To prevent a transcription stream from being used while a call sits in a queue and possibly hitting Amazon's streaming limit, use the new `Sample_SCV_Agent_Whisper_With_Transcription` contact flow. This flow executes and starts transcription when an agent accepts an inbound call.

In new Amazon contact centers, the new `Sample_SCV_Inbound_Flow_With_Transcription` contact flow replaces `Sample_SCV_Inbound`.

SEE ALSO:

[Service Cloud Voice Implementation Guide: Using Service Cloud Voice Contact Flows \(can be outdated or unavailable during release preview\)](#)

Messaging

Dynamically route messaging sessions with Omni-Channel flows. Close multiple messaging sessions with a few clicks.

IN THIS SECTION:

[Route Messaging Sessions with Omni-Channel Flows \(Beta\)](#)

With the help of Flow Builder's power and flexibility, define your routing rules to dynamically route messaging sessions. In addition to routing to queues or skills, Omni-Channel flows allow you to develop a more personal relationship with your customers by routing sessions directly to agents, such as the account owners.

[Save Time with the End Session Mass Action](#)

End up to 200 messaging sessions at one time from All Sessions.

Route Messaging Sessions with Omni-Channel Flows (Beta)

With the help of Flow Builder's power and flexibility, define your routing rules to dynamically route messaging sessions. In addition to routing to queues or skills, Omni-Channel flows allow you to develop a more personal relationship with your customers by routing sessions directly to agents, such as the account owners.

Where: This change applies to Lightning Experience in Essentials, Professional, 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](#).

Save Time with the End Session Mass Action

End up to 200 messaging sessions at one time from All Sessions.

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

Chat

Manage object accessibility with two new allowlists. Make smoother transitions between sessions with transfers and conferences.

IN THIS SECTION:

[Improve Your Control Over Objects Available Using findOrCreate API](#)

Specify which objects are accessible using the findOrCreate API with two allowlists in Chat Settings.

[Avoid Multiple Greetings in a Session](#)

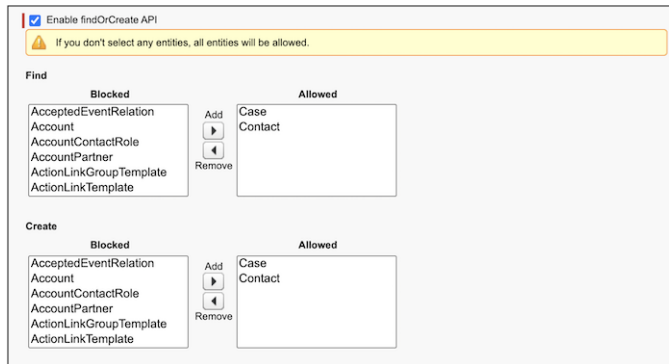
When agents use the transfer or conference features during a session, users sometimes get two greetings after a new agent joins the chat. Disable the auto-greeting for transfers and conferences.

Improve Your Control Over Objects Available Using findOrCreate API

Specify which objects are accessible using the findOrCreate API with two allowlists in Chat Settings.

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

How: On the Chat Settings page in Setup, select objects that service agents can find and create using the findOrCreate API. We recommend allowing objects that you feel are required for your org's usage of the API. If no objects are selected, all objects are allowed.



SEE ALSO:

[Service Cloud Chat Developer Guide: findOrCreate \(can be outdated or unavailable during release preview\)](#)

Avoid Multiple Greetings in a Session

When agents use the transfer or conference features during a session, users sometimes get two greetings after a new agent joins the chat. Disable the auto-greeting for transfers and conferences.

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

How: From Chat Agent Configurations in Setup, select **Disable auto-greeting for transfers/conferences**.

Workforce Engagement

Make data-driven planning and staffing decisions in an Omni queue-based workflow. Workload history, intelligent forecasting, Omni-Channel planning, and scheduling rules now work with skills-based workflows and Omni queue-based workflows. Streamline mapping of job profiles to queues with the new Configuration App. Create shifts in bulk straight from your Omni-Channel plan, and speed up the process further with shift templates. Filter your workload history by text or picklist fields on a lookup entity.

IN THIS SECTION:

[Create a Workload History, Intelligent Forecast, and Omni-Channel Plan in a Queue-Based Workflow](#)

Workforce Engagement's planning and staffing tools now work with queue-based routing. The queue-based version of the workload history, intelligent forecast, and Omni-Channel plan wizards have been streamlined to increase time to value. You get to the business analytics you need faster.

[View the Omni-Channel Plan by Shifts, Not Time Intervals](#)

Your Omni-Channel plan results now reflect a real-world use case. Instead of displaying the results in time intervals, for example hourly, daily, or weekly, your plan displays results in terms of how many shifts are required to meet your workload demands. You can still adjust your workload history and intelligent forecast before creating an Omni-Channel plan, and you can still adjust your shift count via the Shifts app.

[Map Job Profiles to Queues with the Workforce Engagement Configuration App](#)

The new Workforce Engagement Configuration App streamlines your setup process. Currently, the app makes mapping job profiles to queues quick and easy. Set up this mapping one time, so you focus on the important work of creating an Omni-Channel plan.

Create Shifts in Bulk from Your Omni-Channel Plan

In just a few clicks, create all of the remaining shifts required by your Omni-Channel plan. Increase the accuracy and time to value of shift creation by creating them directly from your plan. No more cloning shifts one by one and tracking how many you still need.

Set a Match Queues Scheduling Rule

Shift assignment tools are now inclusive of customers who rely on queue-based routing. Match agents to shifts based on the queue associated with the shift.

Create Shifts from a Template

Increase the time to value of the shift creation process with pre-populated templates that can be inserted in a single click. Gone are the days of entering in each field value for a shift manually.

Filter a Workload History Based on Picklist or Text Fields

Filter your workload history dashboard by picklist or text fields on a lookup object. If you rely on lookup objects to store important data, reference that data in your workload history dashboard filters. Previously, you could only filter by picklist fields.

Set Objectives for Streamlined Scheduling

To help achieve their business goals, admins and planners can integrate objectives in shift scheduling. Adding an objective in a new setup menu, such as balance shifts, delivers an equal number of shifts assigned from the scheduling logic engine.

Ease the Pain with Non-Standard Shifts

Some days are harder than others. To increase employee satisfaction and ensure equitable assignments, planners can now mark painful or less convenient shifts as non-standard for managers to view at a glance. This designation also applies to the scheduling logic engine to auto-balance these shifts across your workforce.

Create a Workload History, Intelligent Forecast, and Omni-Channel Plan in a Queue-Based Workflow

Workforce Engagement's planning and staffing tools now work with queue-based routing. The queue-based version of the workload history, intelligent forecast, and Omni-Channel plan wizards have been streamlined to increase time to value. You get to the business analytics you need faster.

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.

Who: Users with the Workforce Engagement Analyst permission set can create or view a workload history, intelligent forecast, or Omni-Channel plan. Users with the Workforce Engagement Planner permission set can create or view an Omni-Channel plan.

How: The location of the creation wizard for a new workload history, intelligent forecast, or Omni-Channel plan hasn't changed. In a Salesforce org where Omni is enabled, you select queues instead of skills during the creation wizard flow.

View the Omni-Channel Plan by Shifts, Not Time Intervals

Your Omni-Channel plan results now reflect a real-world use case. Instead of displaying the results in time intervals, for example hourly, daily, or weekly, your plan displays results in terms of how many shifts are required to meet your workload demands. You can still adjust your workload history and intelligent forecast before creating an Omni-Channel plan, and you can still adjust your shift count via the Shifts app.

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.

Who: Users with the Workforce Engagement Analyst permission set can create or view an Omni-Channel plan. Users with the Workforce Engagement Planner permission set can create or view an Omni-Channel plan.

How: The location of the creation wizard for a new workload history, intelligent forecast, or Omni-Channel plan hasn't changed. In a Salesforce org where Omni is enabled, you select queues instead of skills during the creation wizard flow.

The associated shift template determines a shift's duration. Previously, the analyst or planner had to enter the duration for each job profile when creating an Omni-Channel plan.

Map Job Profiles to Queues with the Workforce Engagement Configuration App

The new Workforce Engagement Configuration App streamlines your setup process. Currently, the app makes mapping job profiles to queues quick and easy. Set up this mapping one time, so you focus on the important work of creating an Omni-Channel plan.

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.

Who: Users with the Workforce Engagement Analyst or Workforce Engagement Planner permission sets can use the Workforce Engagement Configuration App.

How: To install the app, in Setup, open **Workforce Engagement Management**. Then check the box to **Enable Workforce Engagement Configuration App**.

Create Shifts in Bulk from Your Omni-Channel Plan

In just a few clicks, create all of the remaining shifts required by your Omni-Channel plan. Increase the accuracy and time to value of shift creation by creating them directly from your plan. No more cloning shifts one by one and tracking how many you still need.

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.

Who: Users with the Workforce Engagement Planner permission set can create shifts from an Omni-Channel Plan.

How: From your Omni-Channel plan, click the **Create Shifts** button. Follow the steps to create the remaining shifts required by your plan. To see the newly created shifts, refresh your plan.

Set a Match Queues Scheduling Rule

Shift assignment tools are now inclusive of customers who rely on queue-based routing. Match agents to shifts based on the queue associated with the shift.

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.

Who: Users with the Workforce Engagement Planner permission set can set scheduling rules.

How: From Setup, open **Scheduling Rules**, and then click **New**. Select **Match Queues** as your Scheduling Rule Type, and then proceed to create the rule.

Create Shifts from a Template

Increase the time to value of the shift creation process with pre-populated templates that can be inserted in a single click. Gone are the days of entering in each field value for a shift manually.

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.

Who: Users with the Workforce Engagement Planner permission set can create shifts from a template.

How: Find the **New from Template** button under the Shifts entity. Select a template value to autofill the shift start time and shift duration. If set up, two optional fields autofill: non-standard flag and job profile.

The screenshot shows a 'New from Template' dialog box. It contains the following fields and controls:

- Shift Template ID:** A dropdown menu showing 'Ursa Major Full Time Expert' with a close button (X).
- * Start Time:** A date and time selector showing 'Aug 2, 2021' and '12:00 AM'.
- * End Time:** A date and time selector showing 'Aug 4, 2021' and '12:00 AM'.
- * Status:** A dropdown menu showing 'Tentative'.
- Job Profile:** A dropdown menu showing 'Tier 2 Solar Expert' with a close button (X).
- Service Territory:** A search field with the placeholder text 'Search Service Territories...' and a magnifying glass icon.
- Service Resource:** A search field with the placeholder text 'Search Service Resources...' and a magnifying glass icon.
- * Time Slot Type:** A dropdown menu showing 'Normal'.
- Non Standard:** A checkbox that is currently unchecked.
- Buttons:** 'Cancel', 'Save & New', and 'Save'.

Filter a Workload History Based on Picklist or Text Fields

Filter your workload history dashboard by picklist or text fields on a lookup object. If you rely on lookup objects to store important data, reference that data in your workload history dashboard filters. Previously, you could only filter by picklist fields.

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.

Who: Users with the Workforce Engagement Analyst permission set can create and view a Workload History.

How: In a Salesforce org where Omni isn't enabled, launch the workload history creation wizard. When asked to select and map Region, Skills, and Custom fields, select a child text or picklist field on lookup entity. A corresponding column appears where you can select the parent field it looks up to.

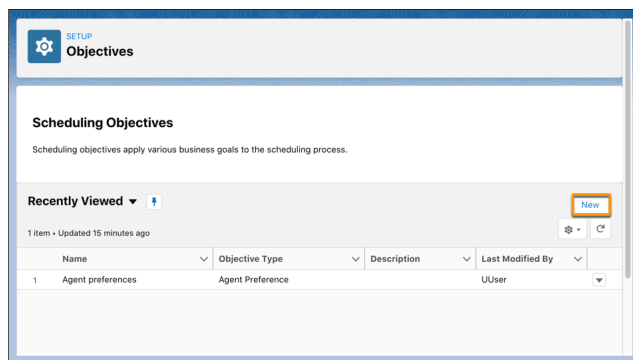
Set Objectives for Streamlined Scheduling

To help achieve their business goals, admins and planners can integrate objectives in shift scheduling. Adding an objective in a new setup menu, such as balance shifts, delivers an equal number of shifts assigned from the scheduling logic engine.

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.

Who: Users with Workforce Engagement Planner permissions can add scheduling objectives in setup.

How: From Workforce Engagement Setup, select Scheduling Objectives to set your new objective.



Ease the Pain with Non-Standard Shifts

Some days are harder than others. To increase employee satisfaction and ensure equitable assignments, planners can now mark painful or less convenient shifts as non-standard for managers to view at a glance. This designation also applies to the scheduling logic engine to auto-balance these shifts across your 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.

Who: Users with Workforce Engagement Planner permissions can mark shifts and shift templates.

How: To identify a shift or a shift template as non-standard, select the checkbox in a shift or shift template record.

Routing

Efficiently route work to the most qualified agents with Omni-Channel Flow. To save time building the flow, start with a template.

IN THIS SECTION:

[Connect Your Customers to the Correct Service Agents Using Omni-Channel Flow \(Generally Available\)](#)

Manage complex routing processes from a centralized location to create efficient, flexible, and productive service experiences. Omni-Channel Flow unifies the routing setup for all supported channels. Omni-Channel Flow supports voice calls, chats, messaging sessions, cases, leads, and custom objects. This feature, which is now generally available, includes some changes since the beta release.

[Get a Head Start on Building Omni-Channel Flows with Templates](#)

To save time and effort, start building Omni-Channel flows with templates. The new templates include prebuilt variables and sample routing logic for key use cases. You can quickly and easily customize flows created from templates to route work based on your business needs.

[Give Agents More Context with a Customized Screen Pop](#)

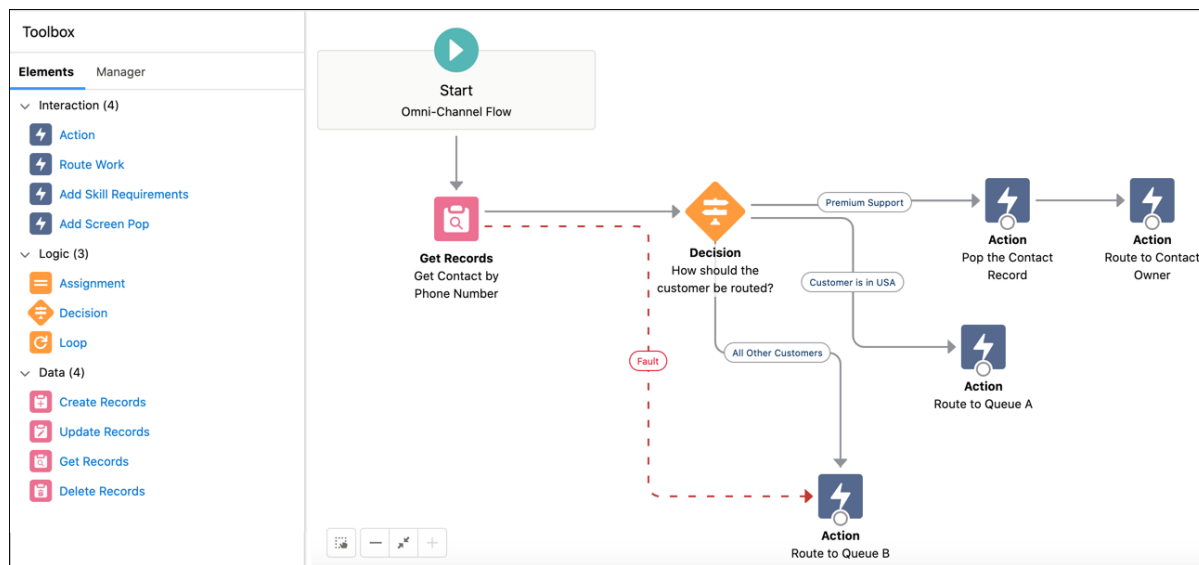
Personalize service by providing the agent with more information about the conversation. With screen pop, automatically open up to three records on the agent's screen when a voice call, message, or chat is routed to the agent. For example, you can show the customer's contact, case, and order records on separate subtabs, along with the primary work record.

Connect Your Customers to the Correct Service Agents Using Omni-Channel Flow (Generally Available)

Manage complex routing processes from a centralized location to create efficient, flexible, and productive service experiences. Omni-Channel Flow unifies the routing setup for all supported channels. Omni-Channel Flow supports voice calls, chats, messaging sessions, cases, leads, and custom objects. This feature, which is now generally available, includes some changes since the beta release.

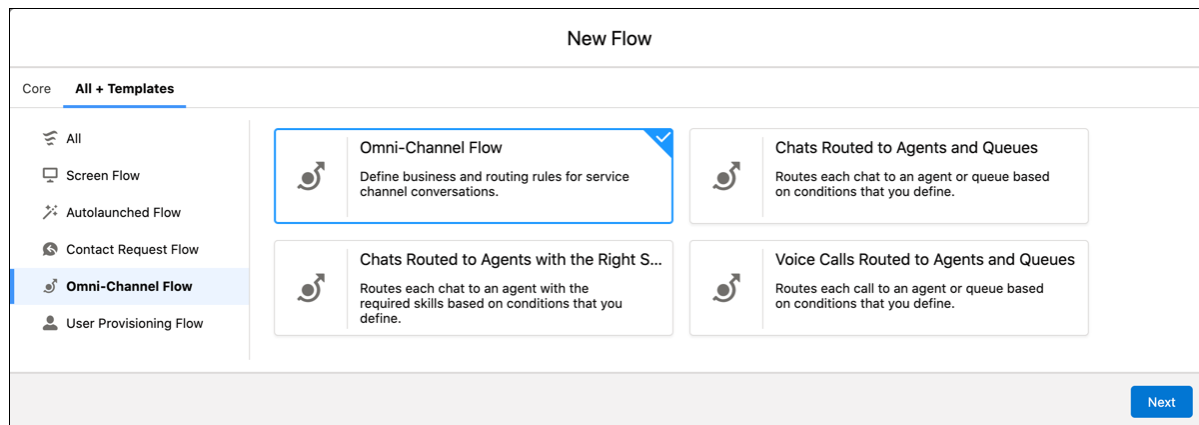
Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, Professional, and Developer editions in Service Cloud.

Why: 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. Route work based on the website that your customer is using, their location or language, the number of times they reached out for help, or even their preferred agent.

How: To create an Omni-Channel flow, from Setup, in the Quick Find box, enter *Flows* in the Quick Start menu. Under Process Automation, select **Flows**, and then select **New Flow**. In the left pane of the New Flow screen, select **Omni-Channel Flow** to filter the flow types to Omni-Channel flows, and then select an Omni-Channel flow template in the right pane.



If you currently use Omni-Channel Flow (beta), the Winter '22 release contains these enhancements.

- Support for the Messaging and Voice channels (beta)
- The Add Screen Pop action opens related records when work, such as a chat, is routed to an agent.

SEE ALSO:

[Salesforce Help: Omni-Channel Flows \(can be outdated or unavailable during release preview\)](#)

[Salesforce Release Notes: Route Calls with Omni-Channel Flows \(Beta\)](#)

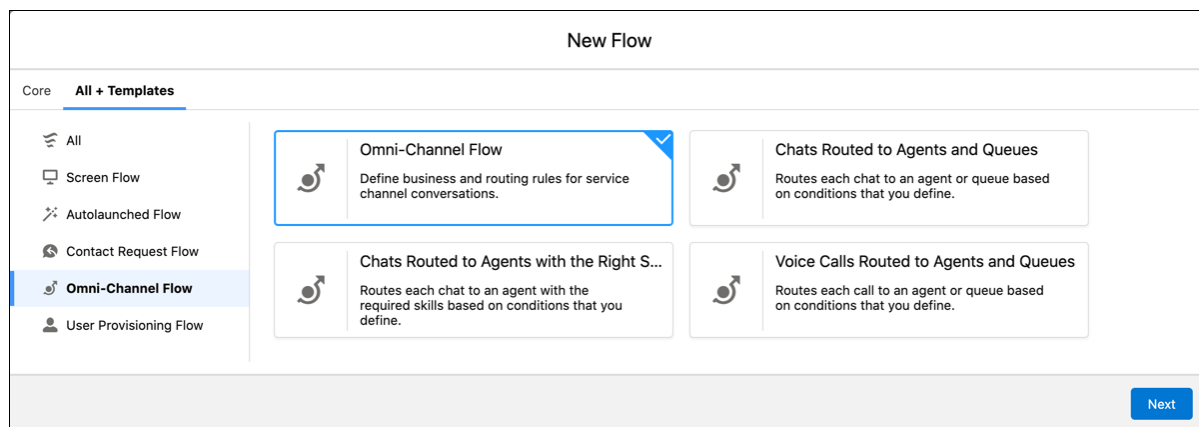
[Salesforce Release Notes: Route Messaging Sessions with Omni-Channel Flows \(Beta\)](#)

Get a Head Start on Building Omni-Channel Flows with Templates

To save time and effort, start building Omni-Channel flows with templates. The new templates include prebuilt variables and sample routing logic for key use cases. You can quickly and easily customize flows created from templates to route work based on your business needs.

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

How: When you create a flow, click **All + Templates**, select **Omni-Channel Flow**, and then select the flow template. For example, to route chats, start with the Chats Routed to Agents and Queues template.




SEE ALSO:

[Salesforce Help: Omni-Channel Flow Templates \(can be outdated or unavailable during release preview\)](#)

Give Agents More Context with a Customized Screen Pop

Personalize service by providing the agent with more information about the conversation. With screen pop, automatically open up to three records on the agent's screen when a voice call, message, or chat is routed to the agent. For example, you can show the customer's contact, case, and order records on separate subtabs, along with the primary work record.

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

 **Note:** In Summer '21, Screen Pop was a closed pilot feature. If you added the pilot version of a Screen Pop action to a flow, replace it with the new version. If your flow includes the old version of the action, the flow runs successfully, but the screens don't open when the work is routed to an agent.

How: To set up screen pops, add a Screen Pop action to the Omni-Channel flow and specify which records to open. Pass the Screen Pop action output to the Route Work action to open the screen pops when the agent accepts work.

New Action

* Label

* API Name

Description

Use a screen pop to show supporting information when the agent accepts work. For example, add multiple screen pops to open the customer's contact, case, and order record details when the agent accepts a chat, a call, or other work item. [Learn More](#)



Set Input Variables

Optionally, if you have more than one Screen Pop action in your flow, pass the output from the previous Screen Pop action into this field.

Set Collection Variable

Records to Open

Select which Salesforce records to open. When the agent accepts the work, each record opens on a separate subtab and in the order you specify.

* Record	Focus	
<input type="text" value="{!GetContactRecord.Id}"/>	<input type="checkbox"/>	
* Record	Focus	
<input type="text" value="{!GetContactRecord.Account.Id}"/>	<input checked="" type="checkbox"/>	

+ Add Another Record

> Advanced

Cancel

Done

SEE ALSO:

[Salesforce Help: Add Screen Pops to Give Agents More Context about Conversations](#) (can be outdated or unavailable during release preview)

Einstein for Service

Help your agents respond to customer queries quickly and consistently with Einstein for Service Cloud. We refined the template generation process for Reply Recommendations to remove short or repetitive replies and focus Einstein's predictive powers on the more complex parts of conversations.

IN THIS SECTION:

[Retiring the Related Record from Case Classification](#)

Starting Summer '21, you can no longer display predictions using the Related Records component. To display Einstein's predictions, we recommend using the Einstein Field Recommendation component.

[Upgrade Your Customer Service Materials with Smarter Reply Templates](#)

We made template recommendations more robust to help agents resolve cases more quickly, accurately, and consistently. We also reduced the number of short or similar replies and focused the majority of the templates on the middle, more meaningful part of conversations. After you review and publish your reply templates, Einstein can recommend them to your chat agents.

SEE ALSO:

[Einstein Release Notes](#)

Retiring the Related Record from Case Classification

Starting Summer '21, you can no longer display predictions using the Related Records component. To display Einstein's predictions, we recommend using the Einstein Field Recommendation component.

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

Upgrade Your Customer Service Materials with Smarter Reply Templates

We made template recommendations more robust to help agents resolve cases more quickly, accurately, and consistently. We also reduced the number of short or similar replies and focused the majority of the templates on the middle, more meaningful part of conversations. After you review and publish your reply templates, Einstein can recommend them to your chat agents.

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

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

When you have enough usable transcripts, from Setup, enable Einstein Reply Recommendations. Build a predictive model and select replies from the initial reply templates to publish as quick text. When there are 10,000 closed chats to learn from, Einstein rebuilds the model and refreshes your reply template list. Review the templates and publish new replies so that you can put more responses at your agents' fingertips.

Knowledge

We expanded accessibility to knowledge article versions with a new list layout.

IN THIS SECTION:

[Review Knowledge Article Versions with Improved Accessibility Measures](#)

See your knowledge article version history in an adjustable list layout that improves accessibility for users who require assistive technologies like screen readers.

SEE ALSO:

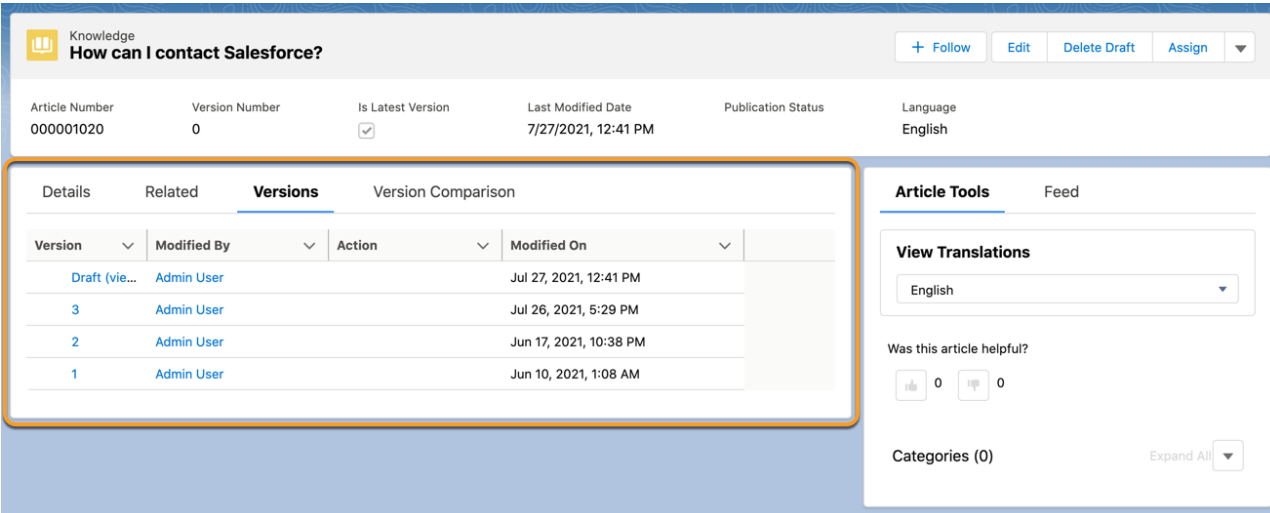
[Use Knowledge Advanced Search with Einstein Search](#)[Assist Your Agents and Customers to Find Knowledge Articles \(Pilot\)](#)

Review Knowledge Article Versions with Improved Accessibility Measures

See your knowledge article version history in an adjustable list layout that improves accessibility for users who require assistive technologies like screen readers.

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

How: To generate a list of the knowledge article versions, in your Service Console, select an article, then click the Versions tab.



Knowledge
How can I contact Salesforce?

+ Follow Edit Delete Draft Assign

Article Number	Version Number	Is Latest Version	Last Modified Date	Publication Status	Language
000001020	0	<input checked="" type="checkbox"/>	7/27/2021, 12:41 PM		English

Details Related **Versions** Version Comparison

Version	Modified By	Action	Modified On
Draft (vie...	Admin User		Jul 27, 2021, 12:41 PM
3	Admin User		Jul 26, 2021, 5:29 PM
2	Admin User		Jun 17, 2021, 10:38 PM
1	Admin User		Jun 10, 2021, 1:08 AM

Article Tools Feed

View Translations

English

Was this article helpful?

0 0

Categories (0) Expand All

Cases

Easily add tables to emails and customize their appearance. See two reminders about the changed enforcement dates for new email threading behavior and a default No-Reply address.

IN THIS SECTION:

[Add Tables to Emails](#)

No more copy-and-paste! In the email composer, use the new table action to add a table to the body of your email. Customize the table's contents, size, caption, and appearance. An email can contain multiple tables.

[Disable Ref ID and Transition to New Email Threading Behavior \(Release Update\)](#)

We now match email headers to their corresponding cases. With the new threading behavior, new outbound emails don't contain a Ref ID. This update was first made available in Winter '21.

[Use a Default No-Reply Address as System Address for Case Email Notifications \(Release Update\)](#)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. 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 was first made available in Spring '21.

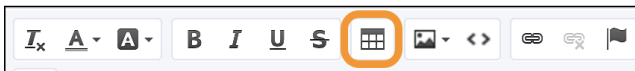
Add Tables to Emails

No more copy-and-paste! In the email composer, use the new table action to add a table to the body of your email. Customize the table's contents, size, caption, and appearance. An email can contain multiple tables.

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

How: The new table feature is automatically available to all Service Cloud users in orgs using Email-to-Case.

To add a table to an email, click the table icon in the email composer's actions menu.



Fill out the table settings.

 A screenshot of the table settings dialog box. It has several input fields:

- * Rows:** A text input field containing the number '3'.
- * Columns:** A text input field containing the number '2'.
- Width:** A text input field containing '500px'.
- Height:** An empty text input field.
- Headers:** A dropdown menu with 'First Row' selected.
- Border Size:** A text input field containing the number '1'.
- Caption:** A text input field containing 'Electric Vehicle Range'.

 At the bottom left, there are two buttons: 'Save' (in blue) and 'Cancel' (in white with a blue border).

Then, add your content to the table. Use the email composer actions menu to style the contents or insert images in the table. To edit the table's cell spacing, padding, and alignment, double left-click on a table border.



Note:

- The table action isn't available in the Lightning email template editor.

- Tables can be copied and pasted into the email composer from other applications, but the styling can be affected.
- Depending on where you're viewing a table in Salesforce, table borders can appear as a double or single line.

To add more table editing options, contact Salesforce.

SEE ALSO:

[Salesforce Help: Email Customers in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Disable Ref ID and Transition to New Email Threading Behavior (Release Update)

We now match email headers to their corresponding cases. With the new threading behavior, new outbound emails don't contain a Ref ID. This update was first made available in Winter '21.

When: This update was first available in Winter '21 and is enforced in Summer '22. This update was originally scheduled to be enforced in Winter '22 but was postponed. 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 review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Disable Ref ID and Transition to New Email Threading Behavior, follow the testing and activation steps.

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 `getCaseIdFromEmailHeaders` replaces `getCaseIdFromEmailThreadId` wherever it occurs in your org's custom code.

SEE ALSO:

[Release Updates](#)

Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. 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 was first made available in Spring '21.

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.

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.

SEE ALSO:

[Release Updates](#)

Slack Apps

Use Slack and Salesforce together to connect with customers, track progress, collaborate seamlessly, and deliver team success from anywhere.

See the Slack Apps release notes for the latest updates: [Salesforce Apps for Slack Release Notes](#)

Work.com

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

See the Work.com release notes for the latest updates: [Work.com Release Notes](#)

Other Salesforce Products and Services

Get the latest information on features from Customer Success Group, Heroku, IdeaExchange, and Trailhead GO.

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](#).

IdeaExchange

Share ideas with the Trailblazer Community and Salesforce product managers with the IdeaExchange. In 2021, we rebuilt the IdeaExchange on Lightning Experience. The new version features an improved search experience that aids discoverability, more informative idea records, and search-as-you-type dupe detection to help avoid posting the same idea twice. For more information, visit the [IdeaExchange](#).

Trailhead GO

Trailhead GO empowers anyone to skill up and connect from anywhere. You can access all of the free Trailhead learning content you love—including the 1000+ badges of marketable skills, trailmixes, and Trailhead LIVE—right from the palm of your hand. Collaborate with Trailblazers, ask questions, and share your knowledge on important topics with the Community in Trailhead GO. Focus on the

learning content that is best completed on a mobile device with the new Trailhead GO compatible filter. And rapidly get the content you want and need with the refreshed Today tab and redesigned Community feed.

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

Learn how to prepare for the multi-factor authentication (MFA) requirement, get help migrating to Einstein Activity Capture, discover resources with the Email and Calendar Integrations learning map, and much more! We also added Trailhead modules and trails, and instructional videos.

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.

[Plan Release Updates More Effectively with Improved Release Notes](#)

To help you plan for your adoption of release updates, we redesigned the Release Updates topic in the release notes. Updates are now organized chronologically by the release when they're scheduled to be enforced. You can quickly see which updates are enforced soon and which updates you have more time to prepare for.

[Get Guidance on the MFA Requirement](#)

The contractual MFA requirement goes into effect on February 1, 2022. We have several new resources to help you get ready.

[Make the Most of the Improved Salesforce Scheduler Documentation](#)

Check out the new [Salesforce Scheduler Developer Guide](#) that brings all Salesforce Scheduler developer resources to one place. The Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs topic shows how to use the Salesforce Scheduler APIs to build a custom scheduling app. You can use the app to schedule and modify appointments including anonymous and multi-resource appointments. For easy access and navigation, we moved the Salesforce Scheduler help topics from the *Extend Salesforce with Clicks, Not Code* guide to a standalone [Salesforce Scheduler Help](#). And, we added useful information about flow screen component attributes to the help.

[Understand User Interface Language Support](#)

To help you better understand your users' experience across Salesforce, we documented the languages that are supported in the Salesforce user interface (UI). The new User Interface Language Support Help page shows the languages that are available in the UI by product.

[Discover Resources with the Email and Calendar Integration Learning Map](#)

Salesforce offers several products that integrate Salesforce with Microsoft® or Google™ email and calendar applications. The Email and Calendar Integrations learning map provides resources for every stage of your journey. Check out videos, help topics, and Trailhead modules in one place, and bookmark the learning map for future reference.

[Learn About Migrating to Einstein Activity Capture](#)

The Lightning Sync migration assistant helps you easily move to Einstein Activity Capture. Several new resources can help you along the way.

[Learn How Einstein Search Uses Your Data](#)

Einstein Search is now on by default, bringing the power of AI to search. Got questions about what Einstein Search does with your data? We've got answers.

Explore Features with Trailhead

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Check out Trailhead at <https://trailhead.salesforce.com>, and find the right trail for you. Here are the latest modules and trails.

Modules

Visual Remote Assistant

Connect customers and employees with real-time visual support via mobile devices.

Filed Service Mobile

We updated the module to include a new unit with details on customizing push notifications, moving the sample data, adding a quick action, and creating a flow.


Trails

Boost Field Service with Mobile







Bring the power of Field Service to your mobile devices.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new  [Deliver Learning Content for Specific Audiences with myTrailhead Content Permissions](#) video shows how to create collections of content, including trails and modules, that you want to make available only to certain users in a myTrailhead subdomain.

And don't miss these new Field Service videos:

- The new  [Any Criteria-Based Maintenance](#) video shows how to use any criteria to create preventive maintenance plans.
- The new  [User Time-Zone on Shift UI](#) video shows how dispatchers and agents can see shifts in a resource's time zone.
- The new  [Mobile Base Product Transfers](#) video shows how to transfer products from one location to another, for example, from the warehouse to the company inventory location.
- The new  [Visual Remote Assistant](#) video shows how to connect remotely with customers and provide the same exceptional service with remote real-time visual support.
- The new  [Appointment Assistant: Self Service Scheduling](#) video shows how to let your customers confirm, reschedule, or cancel their upcoming appointments.
- The new  [Intelligible Recurrence Pattern on Defining Maintenance Work Rule](#) video shows how to schedule recurring work rules by using a calendar interface instead of manually entering RRULE values.

Plan Release Updates More Effectively with Improved Release Notes

To help you plan for your adoption of release updates, we redesigned the Release Updates topic in the release notes. Updates are now organized chronologically by the release when they're scheduled to be enforced. You can quickly see which updates are enforced soon and which updates you have more time to prepare for.

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

SEE ALSO:

[Release Updates](#)

Get Guidance on the MFA Requirement

The contractual MFA requirement goes into effect on February 1, 2022. We have several new resources to help you get ready.

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

How: Check out these new MFA resources.

MFA Requirement: What's Top of Mind for Salesforce Trailblazers

See the top issues that customers are asking about, and get more guidance on what to expect when the MFA requirement goes into effect.

MFA Enforcement Roadmap

Keep track of when Salesforce will auto-enable and enforce MFA for your Salesforce products.

MFA Requirement Checker

Verify that your implementation satisfies the terms of the MFA requirement.

SEE ALSO:

[Get Ready for the Future Requirement to Enable Multi-Factor Authentication \(MFA\)](#)

Make the Most of the Improved Salesforce Scheduler Documentation

Check out the new [Salesforce Scheduler Developer Guide](#) that brings all Salesforce Scheduler developer resources to one place. The Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs topic shows how to use the Salesforce Scheduler APIs to build a custom scheduling app. You can use the app to schedule and modify appointments including anonymous and multi-resource appointments. For easy access and navigation, we moved the Salesforce Scheduler help topics from the *Extend Salesforce with Clicks, Not Code* guide to a standalone [Salesforce Scheduler Help](#). And, we added useful information about flow screen component attributes to the help.

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

Understand User Interface Language Support

To help you better understand your users' experience across Salesforce, we documented the languages that are supported in the Salesforce user interface (UI). The new User Interface Language Support Help page shows the languages that are available in the UI by product.

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

SEE ALSO:

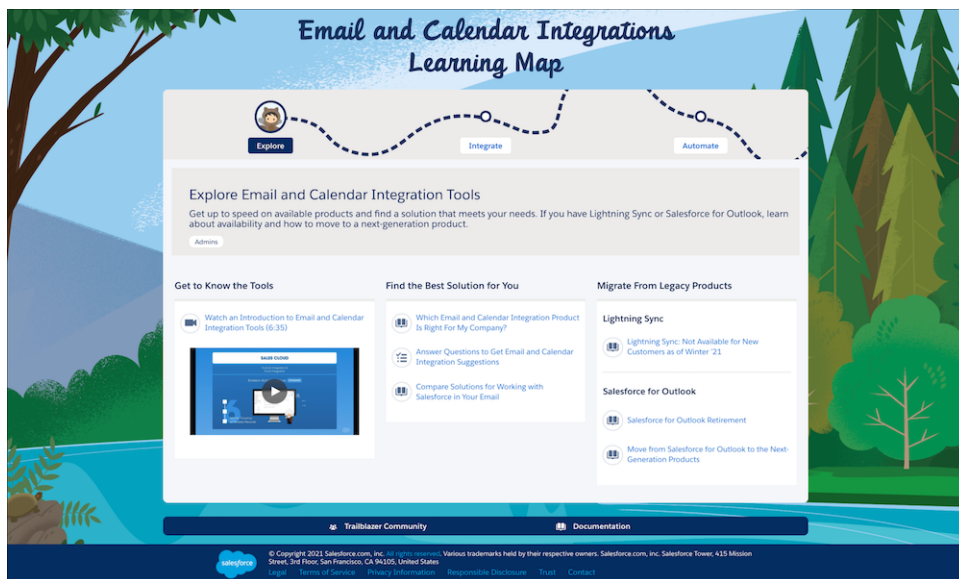
[Salesforce Help: User Interface Language Support](#)

Discover Resources with the Email and Calendar Integration Learning Map

Salesforce offers several products that integrate Salesforce with Microsoft® or Google™ email and calendar applications. The Email and Calendar Integrations learning map provides resources for every stage of your journey. Check out videos, help topics, and Trailhead modules in one place, and bookmark the learning map for future reference.

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

How: Head over to the [Email and Calendar Integration learning map](#) to see resources for every stage of the journey.



Learn About Migrating to Einstein Activity Capture

The Lightning Sync migration assistant helps you easily move to Einstein Activity Capture. Several new resources can help you along the way.

Where: Lightning Sync and Einstein Activity Capture are available in various editions.

Who: The Lightning Sync migration assistant is available only to companies that connect to Salesforce with Microsoft Exchange.

How: These resources guide you through your move to Einstein Activity Capture.

- [Watch a video \(English only\)](#)
- [Read the migration guide](#)

SEE ALSO:

[Move to Einstein Activity Capture Easily](#)

Learn How Einstein Search Uses Your Data

Einstein Search is now on by default, bringing the power of AI to search. Got questions about what Einstein Search does with your data? We've got answers.

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

How: For information, see [How Does Einstein Search Use My Data?](#)

Release Updates

Salesforce periodically provides release updates that improve the performance, logic, security, and usability of our products. The Release Updates page provides a list of updates that can be necessary for your organization to enable. Some release updates affect existing customizations.

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run option that lets you enable an update and examine any changes to your org, including changes to customizations, before that update's Complete Steps By date.

To view release updates, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**.

Enforced with This Release

These updates are scheduled to be enforced this release.

Delete Your Original Territory Management Sharing Records (Release Update)

With this update, your original territory management sharing records are deleted to prevent issues in Enterprise Territory Management. This update was first made available in Summer '21 and is enforced in Winter '22.

Deploy a My Domain (Release 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. If you prefer to use a different My Domain name, you can change it. Because your My Domain affects all application URLs, we recommend that you test and deploy a My Domain before this update is enforced. This update was first made available in Winter '21 and is enforced in Winter '22.

Enforce OAuth Scope for Lightning Apps (Release 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 was first made available in Summer '21 and is enforced in Winter '22.

Removal of Guest User Access to Recognition Badges in Experience Builder Sites (Release Update)

To make sure that recognition badges aren't visible to guest users unintentionally, the default rules now allow only authenticated users to see them. But you can turn off the default setting if you prefer. This update was first made available in Winter '22 and is enforced in Winter '22.

Securely Access Aura Components (Release 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 was first made available in Summer '21 and is enforced in Winter '22.

Securely Call the Visualforce Remoting API (Release 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 was first made available in Spring '21 and is enforced in Winter '22.

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

This update enables process and flow formulas to reference a record's field when the field is accessed via a null lookup relationship field or null record variable. Now process and flow formulas can return null values when the calculations involve a null record variable or null lookup relationship field. This update was first made available in Spring '19. 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 Winter '22.

In Spring '21, Salesforce enabled the test run option for this update because of a known issue with the scheduled enforcement. You can still disable the test run until the update is enforced in Winter '22.

Scheduled to Be Enforced in Spring '22

These updates are scheduled to be enforced in Spring '22. The list can include new, previously announced, and previously postponed release updates.

Analyze Screen Flow Usage (Release Update)

With this update, you can use reports to examine run-time details about your screen flows. Use these metrics to discover usage patterns and in turn to optimize your screen flows for users. This update is available for Salesforce orgs that don't already capture run-time metrics for screen flows. This update was first made available in Spring '21.

Assign New Access Permission Sets and Review New Permissions (Release Update)

Ensure that users have secure and appropriate levels of access to objects and fields. Assign the new Salesforce CPQ Admin User Access and Salesforce CPQ Partner User Access permission sets to your Salesforce CPQ admins and partner users. Review the new permissions added to the Salesforce CPQ Customer User Access permission set. Then use a CPQ package setting to test the permission sets before they're enforced in Spring '22.

Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)

To better protect your Salesforce data, this update changes how unauthenticated guest access to product records is controlled. To prevent guest users from losing access to products, create and test guest user sharing rules. The Product org-wide sharing default for external users is no longer applied to guest users, and guest user access is set to Private. This setting can't be changed. This update was first made available in Winter '22.

Enforce CORS Allowlist for Lightning Apps (Release Update)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server though it's enforced on the browser. This update enforces the allowlist on the server so that disallowed requests are blocked earlier and not processed on the server. This update was first made available in Winter '22.

Keep Working with Tab-Focused Dialogs (Release Update)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This update was first made available in Winter '20.

Login Credentials Using URL Query Strings Are Disabled (Release Update) on page 568

With this update, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Users who try to do so are redirected to the login page. This update improves security.

Set Organization-Wide Sharing for Products (Release Update)

To better protect your Salesforce data, this update adds org-wide sharing settings for product records. As of Spring '22, in new orgs only, the update will set the org-wide sharing default for products to Private for external users. Sharing rules and manual sharing aren't supported. This update was first made available in Winter '22.

Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. 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 was first made available in Spring '21.

Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

When accessing Apex methods defined by custom controllers, the Visualforce Expression Language doesn't correctly validate the access modifiers of the method. Developers can sometimes access unauthorized data on managed and system classes. To improve security, this update validates the Apex method access modifier and throws an error if the Visualforce Expression Language can't access it. This update was first made available in Winter '22.

Scheduled to Be Enforced in Summer '22

These updates are scheduled to be enforced in Summer '22. The list can include new, previously announced, and previously postponed release updates.

Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)

This update lets Salesforce accurately measure, log, and limit the CPU time consumed by flows and processes. 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. This update was first made available in Spring '21.

Disable Ref ID and Transition to New Email Threading Behavior (Release Update)

We now match email headers to their corresponding cases. With the new threading behavior, new outbound emails don't contain a Ref ID. This update was first made available in Winter '21.

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

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22.

Enable Enhanced Domains (Release 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 this update is enforced. This update was first made available in Summer '21.

Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Release 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 was first made available in Winter '21 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Summer '22.

Scheduled to Be Enforced in Winter '23

These updates are scheduled to be enforced in Winter '23. The list can include new, previously announced, and previously postponed release updates.

Prevent Consecutive API Navigation Calls in Visualforce Pages (Release 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 and scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23.

Scheduled to Be Enforced in Spring '23

These updates are scheduled to be enforced in Spring '23. The list can include new, previously announced, and previously postponed release updates.

Enable ICU Locale Formats (Release Update)

To do business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across

the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20.

Scheduled to Be Enforced in Summer '23

These updates are scheduled to be enforced in Summer '23. The list can include new, previously announced, and previously postponed release updates.

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)

This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. 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. This update was first made available in Summer '19.

Canceled Updates

These updates were announced in a previous release but are now canceled. They were removed from the Release Updates node and won't be enforced.

Enable Secure Static Resources for Lightning Components (Release Update)

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.

SEE ALSO:

[Plan Release Updates More Effectively with Improved Release Notes](#)

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

IoT Cloud has been discontinued.

For a complete list of changes to the Trust & Compliance documents related to this release, see the [Salesforce Trust & Compliance Documentation Change Log](#).