

Salesforce Release Notes

Salesforce, Spring '22

Transform your business and succeed from anywhere





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SALESFORCE SPRING '22 RELEASE NOTES

The latest innovations in the Spring '22 release deliver seamless customer and employee experiences, empowering your company to work smarter and succeed from anywhere.

IN THIS SECTION:

How to Use the Release Notes

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

Get Ready for the Release

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

How and When Do Features Become Available?

Some features in Spring '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

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Salesforce Overall

Check out what's blooming in Spring '22. Multi-factor authentication is required starting February 1, 2022. Choose where your prompts and walkthroughs appear. Salesforce Checkout has been replaced with the Your Account app. In Surveys, sentiment analysis can be run on real-time and historical text responses.

Analytics

Customize data with clicks instead of code with the updated Revenue Operations dashboards. Reuse customizations more easily in your dashboards with Lightning Web Components. Get quidance when you search for data with Ask Data for Salesforce (beta).

Commerce

Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2B2C Commerce, Commerce Einstein, and Salesforce Order Management.

Customization

Get better control over who sees what with enhancements to sharing. Use recently expanded guidance to enable ICU locale formats. View and manage permissions more easily with updates to Salesforce Optimizer and the permission set user assignment experience (Beta).

Deployment

Install the updated Spring '22 Ant Migration Tool to use the latest stable library versions.

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

With multi-classification models in Einstein Discovery, predict more than just binary and numeric outcomes. Launch bots in more places with the Einstein Bots API. In Einstein Pilot Consent, let Salesforce data scientists identify patterns in your selected object data to see how Einstein can help. Read on to learn what else Einstein's been up to.

Salesforce Spring '22 Release Notes

Einstein Automate

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

Experience Cloud

Freshen up your site list by archiving outdated sites that have outlived their usefulness, and make space for the shiny new sites that your users need. Create multilingual LWR sites to reach international audiences, and build LWR sites more quickly with new drag-and-drop components. You can also optimize your site's performance with several content delivery network (CDN) enhancements.

Field Service

Use the Field Service learning map to navigate setup tasks and find the right help. Onboard faster with the Key Concepts and Glossary. Create more efficient schedules with bundled service appointments that group nearby work, and use the REST APIs to make the bundler changes you need. Shift enhancements help managers balance assignments and accommodate worker preferences, as well as update shifts in bulk. Add flexible criteria-based preventive maintenance plans to keep your assets in shape. Briefcase Builder and related records priming help save time by letting you choose only what you need to download before going offline.

Hyperforce

Hyperforce is a new infrastructure architecture that unifies the foundations of the various clouds and allows Salesforce to scale rapidly and securely using public cloud partners. Leveraging the public cloud allows Salesforce to expand quickly to new regions that address your local data storage requirements. Hyperforce fosters innovative growth by using common tools, deployment patterns, security practices, and more.

Industries

Industries solutions have even more goodies for specific business verticals, so you don't have to customize Salesforce yourself. Net Zero Cloud (formerly Sustainability Cloud) gives you new ways to measure and act on your organization's carbon footprint. Financial Services Cloud improves deal tracking and record searches, and adds a Branch Management app. Health Cloud offers identity verification to protect sensitive information. Manufacturing Cloud improves forecasting and SKU management. The Business Rules Engine brings Decision Explainer to help you provide clear reasons for application approvals, rejections, and benefit calculations. We've also made advances in the data processing engine, flows, branch management, rebate management, action plans, and loyalty management, all of which are available for multiple Salesforce clouds.

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 and a new Mobile Home card for Pinned Lists Use the new Related Record Priming beta for more accurate and efficient record filtering. Plan for the retirement of tablet app experiences on all devices and the Managed Public Option for Mobile Publisher on Android devices.

Pardot

Enjoy more control over enhanced landing pages, which now include layout templates, header code support, and inline form styles. You also get Lightning templates for Salesforce Engage, and expanded automation support and Einstein Engagement Frequency for enhanced emails. Get more out of Pardot with new objects for Version 5 of the API, and the new Tracking and Consent JavaScript API. Plus, prepare for email privacy changes with Pardot's new open rules audit tool.

Quip

Get the most out of your Salesforce data with Quip. Choose whether you want your users to work in Quip with documents that auto-fill with Salesforce data or in Lightning Experience with Quip documents embedded in Salesforce records. Measure and report on your users' document engagement with faster and more thorough Quip metrics. Use multi-factor authentication to protect your Quip data.

Salesforce Spring '22 Release Notes

Revenue

Enhanced domains don't support new plugins, and we're enforcing data restrictions for Access permission sets. Browser performance improvements are coming, and so is default enforcement of encrypted customer IDs in Payeezy ACH payment methods. Prevent inaccurate credit allocations for invoices with header-level payment allocations. We fixed an error with crediting invoices that have equal total amounts and balances due to payment and debit allocations. Review new order and order product standard field permission requirements.

Sales

Use Revenue Intelligence to generate more revenue with performance dashboards, analytics, and intuitive pipeline visualizations. Pipeline Inspection adds insights about deal progress and engagement. See transcripts for voice and video calls. Enjoy an improved setup experience for Collaborative Forecasts. Create more engaging email content with custom components in email templates created with Email Template Builder. Plan territories with help from overlays using choropleth maps and other boundaries in Salesforce Maps Territory Planning. High Velocity Sales users can start using sales cadences without building their own.

Salesforce CDP

Get deeper integrations with Salesforce partners and products to expand the power of Salesforce CDP, our self-service customer data platform. AppExchange partners and developers can now build and share external activation platforms, letting you expand your activation capabilities with familiar solutions. There's a new SDK to unify Salesforce CDP and Marketing Cloud MobilePush data for messages and insights. And look out for updated documentation to help you on your Salesforce CDP journey.

Salesforce CMS

Explore beta features like enhanced CMS workspaces and improved site search, and learn about how Digital Experiences is the renamed way to access the Salesforce CMS app in Lightning Experience.

Security, Identity, and Privacy

Keep your implementation running securely and smoothly with improved Platform-driven security solutions. Refine how users access your sites, apps, and implementations with domain improvements, built-in authenticators (generally available), single sign-on with Slack, and more authentication options. Preference Center (beta) joins the Privacy Center team, helping customers define their communication preferences. Shield products integrate with a wider range of features and clouds. View more metrics in Security Center. And the new Security Policies (beta) feature in Security Center helps you manage Health Check baselines from a central location for all tenants.

Service

Enjoy a range of new Service Cloud features that help you and your team deliver efficient, flexible service. Use Omni-Channel Flows to dynamically route customer calls and messages to the preferred agent or bot. Let contact center supervisors access real-time Amazon Connect metrics and listen in on calls with Service Cloud Voice. Build fully functional bots with a new bot template and the user-friendly Conversation Canvas, or use the Einstein Bots API platform. Swiftly triage incidents with new Incident Management features like SLA management tools and Omni-Channel support. And meet staffing needs and make scheduling decisions with new tools in your Workforce Engagement toolbox, including historical adherence metrics.

Salesforce for Slack

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

Safety Cloud

In today's uncertain health environment, vaccines and testing are critical for getting people together more safely. Also critical for organizations are secure, personalized, and timely communications about in-person gatherings that help build trust between them, their personnel, and their consumers. With Safety Cloud, organizations can create safer and more trusted events and return-to-work experiences.

Health Verification

Optimize how you manage Health Verification records by assigning them to the user's Person Account. Reduce the likelihood of user error by launching Health Verification forms with customer data pre-filled. Attend to problematic health verifications efficiently with a special queuing option. Use custom metadata types to improve how you manage Health Verification FAQ content and Health Verification notifications.

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

We added new Field Service and Salesforce Maps resources.

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.

- 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.

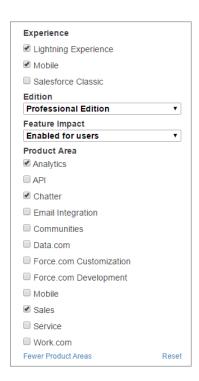
Feature Impact

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.



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	
Automated Case User = System? System User invisible to Sharing rules	Share High-Volume and System User Records in Criteria Based Sharing Rules (partially delivered)
Enable Divisions in Lightning for Accounts	Control the Default Records Your Users See with Scoping Rules (Generally Available) (partially delivered)
More configurable Restriction Rules (support more field types, e.g. picklists)	Use Single Picklists in Restriction and Scoping Rule Criteria (partially delivered)
External Services OpenAPI 3.0 Support	Register More Specs with OpenAPI 3.0 Support
Do Not Default Mime Types for External Services	Map Unsupported Media Types in Your Registration
Development	
Ability to Generate OpenAPI Docs for REST-ful Integration	Generating an OpenAPI 3.0 Specification for sObject REST API (Beta)
Experience Cloud	
Maintenance Mode for Communities	Put Your Site in Maintenance Mode While Making Updates
Allow System Admin to Delete Communities in Ideas	Archive Experience Cloud Sites

IdeaExchange	Idea delivered
CMS - Auto play the carousel, CMS Collections	Autoplay CMS Collections in Aura Sites
Pardot	
Include Landing Pages in list of objects you can query via the API	Pardot API: New and Changed Items
Ability to Create, Update, Delete Pardot email templates via the API	
PARDOT API: Add Query for Email Template	
Include Sender field in Pardot email API	
Custom Templates for Salesforce Engage	Choose Which Email Template Types Are Available in Salesforce Engage
Sales	
Ability to Create Heat, Density, and Concentration Maps in Territory Planning	Overlay Metrics and Other Borders
Security and Identity	
Allow for Customizable Transaction Security Alert Emails	Craft Custom Transaction Security Notification Emails

Release Note Changes

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

May 17, 2022

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

Clarified that LWS can affect Experience Cloud sites that are Aura-based.

Enablement of Lightning Web Security Begins

Clarified that LWS can affect Experience Cloud sites that are Aura-based.

Added information about enabling LWS in sandbox orgs.

May 12, 2022

Sales Cloud for Slack

Sales Cloud for Slack is now available as a beta service.

May 2, 2022

Review and Update Record Stages in Salesforce Meetings

Added release note about Path availability in Salesforce Meetings.

View Detailed Information About Aggregate Rebate Transactions

Updated the How section.

April 25, 2022

Let Your Site Users Deactivate Their Account

The Customizable User Settings component includes new properties that let your users deactivate their account from within Aura sites.

Gain Deeper Insights with Faster Quip Engagement Metrics

Updated the release note to include information about requesting historical engagement metrics from the Quip Admin Console.

April 18, 2022

Package and Deploy Ingestion API Data Streams for Easy Reuse

Added a release note to announce packaging support for Ingestion API data streams in Customer Data Platform.

April 11, 2022

Enable Enhanced Domains (Release Update)

This feature is now available in Government Cloud sandboxes.

Prevent Consecutive API Navigation Calls (Release Update)

This feature affects Lightning components.

Create Custom Components for Email Template Builder

This feature isn't available in Essentials edition.

Swarm on a Case in Slack (Beta)

Added a release note for the new Service Slack App (beta).

Use Change Orders Without Price Books

Added a release note announcing that change orders are now compatible with the Enable Optional Price Books for Orders order setting.

Field Service Customer Engagement

Updated the Where section. The Field Service managed package doesn't need to be installed for these features.

April 4, 2022

Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform

Added a release note announcing availability of business unit aware integration between Marketing Cloud and Customer Data Platform.

Do More with Improved Deep Linking on iOS

The Salesforce Mobile App added link support for quick actions and direct view of record relationship pages.

Lightning Console JavaScript API

The label for Account Role Optimization setting is now Minimize the number of roles created, which improves performance by cutting down processing loads.

raiseAgentWorkFlag, lowerAgentWorkFlag, and lightning:omniChannelWorkFlagUpdatedaren't quite ready for showtime, so we're removing them for now while we make improvements. We'll let you know once they're back up.

Use Location Features in Your Mobile Publisher App

Added a "Why" section to clarify use cases, removed "How" section to reduce unnecessary calls to support, and added a little more detail in shortdesc.

Authenticate across Salesforce for Slack apps using the Salesforce Digital HQ app

Added a release note for the Salesforce Digital HQ app in Slack.

Manage Your Approvals in Slack

Added a release note for managing approvals via the Salesforce Digital HQ app.

Troubleshoot Deployment Errors More Easily

Added a release note about improved error messages when deploying a site using ExperienceBundle.

Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

Added information about access modifier requirements and error messages to the "How" section.

Updates to Access Permission Sets

Added a release note about the new permissions added to Access permission sets.

New and Changed Objects

Added release notes for documenting fields introduced in previous versions for ActionCadence objects for High Velocity Sales.

Move a WhatsApp Number to Salesforce Messaging

Added a release note about the new option to move WhatsApp numbers from other business service providers to Salesforce Messaging.

Manage Conversations and Users in Slack with Invocable Actions (Beta)

Added a release note for Salesforce Flow.

Metadata API

Added information about new values that manage conversations and users in Slack.

Run Flows for Guest Users Is Being Deprecated

Updated a release note to change the release when the Run Flows feature is being deprecated.

Get the Latest Version of Tableau CRM for iOS and Android

Updated the note to add what's new in version 15.1 of the Tableau CRM iOS and Android mobile apps.

Bring Data to Every Conversation with Tableau CRM for Slack (Beta)

Added notes for the beta release of the Tableau CRM app for Slack.

Deploy Faster When Updating Metadata with Source Tracking Enabled

Removed this release note because the feature was removed from the Spring '22 release.

March 29, 2022

Run a Loyalty Program on B2C Commerce Site

Added a release note announcing availability of Loyalty Management for Commerce.

March 21, 2022

Enjoy Enhanced Folder Sharing

Updated the release note to notify the availability of the feature.

Plan and Test Your System for Scale Using Performance Assistant

The application is now enabled automatically. We removed instructions for requesting enablement.

Changed Data Processing Engine Metadata Type

LoyaltyPointsAggregation and NetZero are added as new values in the processType field of the BatchCalcJobDefinition metadata type.

Metadata API

Added information for the triggerOrder field on the Flow metadata type.

Net Zero Cloud

Added release notes announcing the new capabilities to manage your waste footprint, set science-based targets, forecast carbon emissions, and manage supplier sustainability data.

Update Your Google Ads Connector for Pardot

Added a release note about the new Google Ads API and required field updates to the Pardot Google Ads connector.

AIApplication API Doesn't Support delete() on page 221

Removed the delete () call from supported calls.

Get More AlApplication Packaging Information on page 221

Added the packaging information for AlApplication.

March 14, 2022

View All Identity Resolution Summary Statistics Together

Added a release note to announce the new Resolution Summary in Customer Data Platform.

Enable Enhanced Domains (Release Update)

Updated the availability of this feature. It's now available in most sandboxes.

Manage Renewals in the Your Account App

Deleted text indicating that you can't renew within 7 days before the renewal date. The cutoff can vary, depending on your contract.

Updates to Inactive Sandbox Expiration Process

Updated the information regarding who receives emails when an inactive sandbox is going to expire.

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

Clarified that Aura components aren't supported and added a link to documentation about when to enable LWS.

Enablement of Lightning Web Security Begins

Clarified that Aura components aren't supported.

Ensure That Your Code Works in Lightning Web Security with New Tools

Updated screenshot images and added links to documentation for the tools.

High Velocity Sales Will Soon Be Sales Engagement

Added release note about the upcoming change to the feature name.

Medication Review (Formerly Medication Management)

Updated content about the Medication Management Add on.

New: Medication Management Add-On

Updated content about the Medication Management Add on.

Know What's Changed in Medication Review Org Preference Settings

Updated content for the Medication Management Add on.

Protect Patient Safety During Care Transition Using Medication Reconciliation

Updated content for the Medication Management Add on.

Vouchers

Added release notes to announce the ability to update the Voucher Definition and Voucher fields.

March 8, 2022

Consumer Goods Cloud

Added release notes announcing the new features of Consumer Goods cloud.

March 7, 2022

Candidate Patient Object Is No More

Updated text to include reference about Salesforce Classic and to mention what happens to existing records in the object.

New and Changed Objects

Added a release note to announce a new field on the ForecastingUserPreference object to control whether changes in the last 7 days appear on the forecasts page.

Salesforce CDP API: New and Changed Items

- Added a release note to announce the new DataSourceField metadata type.
- Added a release note to announce the new dataSourceFields field on the existing DataSourceObject metadata type.
- Added a release note to announce the new DataSourceBundleDefinition metadata type.
- Added a release note to announce the new DataSrcDataModelFieldMap metadata type.

Use Einstein OCR to Detect Handwritten Text (Beta)

Added a release note to announce that Einstein OCR now supports handwritten text.

February 28, 2022

Plan and Test Your System for Scale Using Performance Assistant

Updated permission requirements.

Find Relevant AppExchange Apps and Experts with Ease

Added a release note announcing the new AppExchange home page, which uses personalized recommendations to help you find the right app or expert.

Experience Reduced Minimum Time Between Apex Queueable Jobs

Added a release note about reduced minimum time between Apex queueable jobs.

Set Organization-Wide Sharing for Products (Release Update)

Corrected the enforcement date of this release update. The enforcement date is Winter '23, not Summer '22.

View Savings at a Glance with the Einstein Case Classification Value Dashboard

Added a release note for the EVF for Case Classification.

View Account Forecasts with Exactly the Information You Need

Updated the release note to include information about creating multiple measure groups for a forecast set.

Use a SAML Digest Algorithm Based on Your Request Signature Method

Added a release note introducing updates to SAML digest algorithm behavior for single sign-on and single logout configurations.

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

Added language support for Portuguese to the Article Answers release note.

Custom Fields with __pc Suffix Aren't Supported for Einstein Predictions on page 220

Added a release note for the support for custom fields in Einstein Predictions.

Unlock Insights on Salesforce CDP Data (Generally Available) on page 130

Updated the release note to include information about replacing live connections created in the beta version.

Generate QR Codes Automatically for Health Verifications

Added a release note to Safety Cloud for new automated QR code generation feathure.

Increase Your Licensing Agility with the Partner Licensing Platform (Developer Preview)

Updated instructions on how to sign up for the developer preview.

Support Is Available for the Outlook Integration in the New Outlook for Mac

Added a release note announcing support for the new Outlook for Mac for the Outlook integration.

February 21, 2022

Test Multiple Identity Resolution Rulesets Faster

Added a release note for changes to Identity Resolution Ruleset ID requirements in Customer Data Platform.

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

Removed announcement of Chinese and Portuguese as supported languages. Support for these languages in Article Answers isn't yet available.

Mitigate the Log4j Security Vulnerability in an Amazon Contact Center

Added release note for this security mitigation.

Provider Network Management

Included information on PNM add on in this overview topic

Prevent Inaccurate Credit Allocations for Invoices with Header-Level Payment Allocations

Added a release note for preventing inaccurate credit allocations.

New Permission Requirements for Standard Order and Order Product Fields

Added a release note about new standard object permission requirements for CPQ actions.

New Permission Requirements for Standard Order and Order Product Fields

Added a release note about new standard object permission requirements for Billing actions.

Other Enhancements in Salesforce Maps Territory Planning

Added a release note about reusing calculated attributes.

Deployment

Added release note for downloading the updated Spring '22 Ant Migration Tool.

Choose Your A/B Test Version at a Glance

Added a release note about the updated display of A/B Test versions when copying or editing an A/B Test email in Pardot.

February 14, 2022

Metadata API

Added information about new fields on LiveChatAgentConfig and LiveAgentSettings metadata types for Service Cloud.

See Recent Changes in Forecast Categories

Added prerequisites to enable the **Show Changes in Last 7 Days** option.

Rebuild Search Indexes up to 60 Times per Hour

Updated guidance for rebuilding search indexes for B2B and B2C storefronts.

Scan a Barcode in a Lightning Web Component (Generally Available)

Added a release note to announce the general availability of the BarcodeScanner API for scanning barcodes in a Lightning web component.

Use Location in a Lightning Web Component

Added a release note to announce the LocationService API for geolocation in a Lightning web component.

Salesforce CPQ

Removed information describing how Salesforce CPQ external configurator plugins aren't supported with enhanced domains. This information is described in a Known Issue.

Tooling API New and Changed Objects

Added information about new objects for Service Catalog.

Health Cloud Has New and Changed Objects

Added links to the relevant data models.

Add Collections Directly to Your Lightning Pages

Added revised steps and image for adding a collection to a Lightning page.

Sales Enablement (myTrailhead)

Moved all myTrailhead release notes under Sales, and added these release notes:

- myTrailhead Is Now Part of Sales Enablement—Added a release note that announces the new name for myTrailhead and lists terminology that's changed in the user experience.
- Preview Modules from Your Trailmaker Content Workspace—Added a release note about previewing a module and its units from your local Trailmaker Content workspace, and sharing the preview with others.
- View and Download Published Content More Efficiently—Added a release note about more easily viewing releases and downloading backpacks for released content.

Recommended Grouping for Tables and Charts in Tableau CRM

Removed this release note because this feature is not yet publicly available. For more information, contact Salesforce.

Format Body Text in Floating Prompts

Added a new release note for the rich text editor now available in floating prompts.

February 7, 2022

Medication Review (Formerly Medication Management)

Added release note for Medication Management add-on.

Metadata API

Updated the Metadata API release notes to notify the availability of the new reference object fields in the DataPacketKitObject metadata type.

HTTP Strict Transport Security (HSTS) Cache Duration Is Increased

Corrected the link in the See Also section.

New and Changed Objects

Added a release note to announce updated descriptions for the VoiceCall object.

Scan Barcodes with Custom Lightning Web Components

Added a release note to announce new barcode scanning feature for Mobile Publisher apps.

Use Location Features in Your Mobile Publisher App

Added a release note to announce new geolocation feature for Mobile Publisher apps.

Enjoy More Notification Options with Marketing Cloud Tools

Added a release note to announce new integration with Marketing Cloud for Mobile Publisher apps.

Easily Debug Your Experience Site with Playground App Simulator

Added a release note to announce new developer debugging feature for Mobile Publisher apps.

Invalid HTML Syntax Results in Warnings

Added a release note to announce invalid HTML syntax warnings for Lightning Web Components.

Create Recurring Absences for Service Resources

Added a release about recurring resource absences for Field Service.

New and Changed Objects

Added a release note to announce updated descriptions for the ChangeRequest, Incident, and Problem objects.

Manage Single Sign-On User Mappings

Added a release note about the Auth. ConfirmUserRegistrationHandler Apex interface.

New and Changed Objects

Added a release note to announce new objects and new fields on the ServiceAppointment object for appointment bundling in Field Service.

Build Your Bot with Confidence in Conversation Canvas

Updated release note to announce planned retirement of current menu-based Bot Builder experience.

Boost Quality Assurance with Supervisor Call Monitoring

Updated a release note to announce the availability of Call Monitoring in Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect.

January 31, 2022

Keep Clients Informed of Potential Issues with Record Alerts

Added information about required permission sets.

Spotlight on Content

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

Customize Components with Lightning Design System Styling Hooks (Generally Available)

Added information about changes since beta release.

Choose Which Template Types Are Available in Salesforce Engage on page 467

Pardot API: New and Changed Items

Added Idea Exchange see altos.

Metadata API

Added entry announcing newly documented fields on the ConversationRecordLookup subtype of the BotVersion metadata type and the newly documented ConversationRecordLookupCondition subtype of the BotVersion metadata type.

Added an entry for the new filterExpression field on the PlatformEventChannelMember metadata type. For more information, see Filter Your Stream of Platform Events with Channels (Beta).

Tooling API New and Changed Objects

Added an entry for the new FilterExpression field on the PlatformEventChannelMember object. For more information, see Filter Your Stream of Platform Events with Channels (Beta).

Disable Ref ID and Transition to New Email Threading Behavior (Release Update)

Added release note.

Embed Multiclass Predictions Using the Einstein Predictions Panel

Corrected feature status in release note to generally available.

Do More with Manufacturing Cloud for Service on page 424

Added a release note for Manufacturing Cloud for Service.

Securely Connect Data Across Amazon DynamoDB and Salesforce (Pilot)

Corrected the product name as per Marketing guidelines.

Use Slack and Salesforce Together to Connect with Customers, Collaborate, Track Progress, and Deliver Team Success

Added a note about Salesforce Slack Apps.

Sales Cloud for Slack (Beta) on page 552

Sell as a team in Slack with the Sales Cloud for Slack app.

Run Flows in User Context via REST API (Release Update)

Corrected the enforcement date.

Optimize how you manage Health Verification records by assigning them to the user's Person Account.

Added a release note about latest Health Verification features.

Enable Enhanced Folder Sharing (Release Update)

Added a release note to announce that this update is postponed indefinitely to reduce customer impact.

January 24, 2022

Customer 360 Guide for Healthcare Payers

Added a release note introducing the Customer 360 Guide for Healthcare Payers.

Set a Higher Query Limit in Explorer and Dashboard Widgets

Added a release note that the guery limit has increased in Explorer and Dashboard widgets.

Clear Workspace Tabs for New Console Sessions

Added information about effects on pinned and unpinned tabs.

Identify Holiday Shifts

Removed this release note because this feature is not yet publicly available. For more information, contact Salesforce.

New and Changed Objects

Added a release note that the RecordsetFilterCriteriald field was added to the Object Reference guide.

Define Resource Preference Based on Location and Assets

Clarified how resource preferences are set in work orders and work order line items.

You Asked for It!

Added Idea requesting the ability to generate OpenAPI specification. Delivered as beta.

Track Agent Downtime with Presence Status Syncing

Added a release note that syncing presence status between Amazon Connect and Service Cloud Voice.

Metadata API on page 276

Added release notes for the mobileFeedbackEmails and deepLinkPublicSecurityKey mobile settings on FieldServiceSettings.

Metadata API

Added a release note about the new ContractType, ESignatureConfig, and ESignatureEnvelopConfig metadata types.

Changes to the Telephony Integration REST API on page 602

Added a release note to announce the new Telephony-Provider-Name REST API header for Service Cloud Voice.

Safety Cloud

Created a release note for the inaugural release of Safety Cloud.

Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)

Updated this release note to specify that the Spring '22 enforcement date shown in the Salesforce UI is incorrect.

New and Changed Objects on page 252

Added release notes to announce a datatype change for the JobName and TaskName fields of the ServiceSetupProvisioning object.

January 19, 2022

Removed: Use the Latest Unified Profile Data with More Frequent Ruleset Refreshes

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.

January 17, 2022

You Asked for It!

Added Ideas that we delivered.

Get Org-Specific Domain Hostnames and Information

Added a release note, which highlights the use case for new Apex classes.

Bot Protection Is Added to Forms

Added release note about reCAPTCHA change.

Plan and Test Your System for Scale Using Performance Assistant

Changed the title of the release note and added instructions on how to enable the application.

Use DataWeave in Apex to Enable Data Transformation to Different Formats (Pilot)

Restricted the scope of the feature to scratch orgs and updated the pilot agreement.

Log into Outlook Integration Faster and More Securely

Removed this release note because this feature is not yet publicly available. For more information, contact Salesforce.

Securely Update Email Addresses and Reset Passwords (Release Update)

Added a release note to announce this update is now being enforced.

Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)

Added a release note to announce this update is now being enforced.

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

Changed the release when two-column layouts start being ignored from Summer '22 to Winter '23.

Other Changes to Flow Screen Components

The Dependent Picklists component isn't rebuilt in Lightning Web Components (LWC), and its Flow Builder preview is available only for objects that are supported in the User Interface API.

Include Translations in Extension Packages for Base Package Components

Removed this release note. This feature isn't quite ready for showtime, so we removed it for now while we make improvements. We'll let you know when it's back.

Disable Users from Logging Into an Org or Experience Cloud Site with Login Credentials as URL Query String Parameters (Release Update)

Corrected name of release update.

January 12, 2022

Industries

Removed instances of Consumer Goods from the short description and removed all Consumer Goods related release notes because Consumer Goods has an off-cycle release and the new features are not available yet.

January 11, 2022

Loyalty Management

Updated the names of the Loyalty Management licenses.

January 10, 2022

Customize Components with Lightning Design System Styling Hooks (Generally Available)

Added a release note to announce the styling hooks feature is generally available.

New and Changed Objects

Added release notes about the new forecastingfilter and forecastingfiltercondition objects.

New and Changed Objects in Loyalty Management

Added information about new member enrollment channels.

Fine-Tune Operating Hours with Holidays

Removed this release note because this feature is not yet publicly available.

Identify Holidays with the Dispatcher Console

Removed this release note because this feature is not yet publicly available.

Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

Corrected name of release update.

Log In to Google Again to Continue Syncing Contacts

To avoid a contact sync interruption, Einstein Activity Capture users are prompted to reconnect their Google account in Salesforce.

Update Your Google API Settings for Contact Sync Before Spring '22

To avoid a contact sync interruption for Lightning Sync users, work with your Google administrator to update your Google API settings before the Spring '22 release.

Pipeline Inspection

Updated the where section in Pipeline Inspection release notes to clarify the availability of Pipeline Inspection in certain Editions.

Find Which Apex Classes Implement an Interface (Beta)

Updated title and content to reflect beta feature status.

January 3, 2022

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

Added a release note to announce a change in the subsequent release that you can prepare for now.

Launch Einstein Bots Anywhere with the Einstein Bots API (Beta)

Removed references to the Slack SDK.

Launched the Feedback Management Learning Map

Added a release note about the feedback management learning map introduced for Salesforce Surveys.

User Interface API

We added support for more objects.

New and Changed Objects

Added release notes about the new BackgroundColor and IsNonStandard fields on the existing Shift and ShiftTemplate objects.

Added a release note about the new IsHolidayShift field on the Shift object.

Identify Holidays in the Dispatcher Console

Added details about how to identify operating hours holidays and associated rule violations in the dispatcher console.

Apex: New and Changed Items (System Namespace)

Corrected the class containing parse () methods from System. DomainCreator to System. DomainParser.

December 22, 2021

Salesforce Spring '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 #Spring22Feedback.
- **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 Spring '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.
- Spring '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.
- Spring '22 Release Website. Check out the new features.
- 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 Spring '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

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

Check out what's blooming in Spring '22. Multi-factor authentication is required starting February 1, 2022. Choose where your prompts and walkthroughs appear. Salesforce Checkout has been replaced with the Your Account app. In Surveys, sentiment analysis can be run on real-time and historical text responses.

Franklad for

Dominos

Cambrida

Feature	Enabled for users	enabled for administrators/ developers	Requires administrator setup	Salesforce to enable
	General Enh	ancements		
Get Ready for the Multi-Factor Authentication Requirement			~	
Keep Working with Tab-Focused Dialogs (Release Update)			~	
Improve Salesforce Compatibility with Assistive Technology	~			
Allow Prototyping of Your Data with Einstein Pilot Consent				
	User Enga	agement		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Choose Where Your Prompts Appear		~		
Add Images to a Prompt with a URL		~		
Explore More Resources in the Guidance Center		~		
Learn About Salesforce In-App Content		~		
Format Body Text in Floating Prompts				
Gather User Feedback for Trailhead and myTrailhead Content in Lightning Experience	~			
	Your Acco	ount App		
Say Goodbye to Checkout and Hello to the Your Account App		▽		
Give Your Billing Users Free Access to the Your Account App		~		
Manage Renewals in the Your Account App		~		
Find Key Information at a Glance and Share Contract Pages		₹		
The Your Account App Is Available in Salesforce Classic		₹		
	Lightning	Console		
Clear Workspace Tabs for New Console Sessions			~	
	Salesforce	Surveys		
Reduce Messaging Costs by Sending Short Survey URLs	~			
Spotlight on Content				
Feedback Management Learning Map				
	Salesforce	Scheduler		
Manage Service Resource Availability by Using Shifts			~	
Prevent Appointment Bookings on Holidays			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Support Multiple Languages for Standard and Custom Fields with Data Translation			~	
Present Relevant Work Type Groups to Customers			~	
	Sea	rch		
Einstein Search				
Einstein Search for Knowledge (Pilot)			~	
Adjust Natural Language Search Results (Pilot)			~	
Use Natural Language Search with Tasks	~			
Distinguish Similarly Named Users or Groups with Profile Images	✓			
Search Results Objects Page Has a New Name (Beta)	~			
Get Search Results for More Objects	~			
	Salesforce Da	ata Pipelines		
Bring Tableau CRM and Data Pipelines Data Together		~		
Schedule Recipe Jobs After Other Jobs Complete	~			
Troubleshoot Recipe Jobs with Expanded Monitoring		~		
Other Enhancements to Data Pipelines	<u>~</u>			

Analytics

Customize data with clicks instead of code with the updated Revenue Operations dashboards. Reuse customizations more easily in your dashboards with Lightning Web Components. Get guidance when you search for data with Ask Data for Salesforce (beta).

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Reports and	Dashboards		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Easily Find the Right Report Type for New Reports (Beta)				~
Edit Multiple Fields Inline on the Report Run Page (Beta)			~	
Automatically Tune Your Dashboards to Your Business Goals with Dynamic Gauge Charts (Generally Available)	<u>~</u>			
Enjoy Enhanced Folder Sharing	✓			
	Tablea	u CRM		
Analytics Data Integration				
Check Your Data at a Glance in Data Manager (Beta)				
Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Generally Available)			~	
Adopt the New and Improved Tableau CRM Connectors		~		
Sync Data from HubSpot (Beta)		~		
Output Your Tableau CRM Data to Azure Data Lake (Beta)			~	
Sync Data Faster from Objects That Cascade Hard Deletes		~		
Update Dataset Column Values with Data from Another Source		~		
Combine Unrelated Records with Cross Join (Beta)	~			
Configure Your Fiscal Year in Data Prep	~			
Choose the Columns That You Want to Keep	✓			
Get a Wider Spectrum of Sentiment with the Measure Output Type	~			
Gauge Accuracy with Sentiment Scores	✓			
Save Time with Improved Forecasting	✓			
Embed Multiclass Predictions in Your Dataset During Data Prep	<u>~</u>			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Big Recipes Faster		~		
Set Up Transformations More Easily with Transform Panel Improvements		~		
Manage Direct Data Filters in a Separate Node		~		
Build with Data Prep for Government Cloud Plus		~		
Analytics Prebuilt Apps				
Understand Your Pipeline with the New Customer Insights Pipeline Trending Waterfall Chart	<u>~</u>			
Shine a Light on Your Energy and Utility Sales Processes	~			
Create Meaningful and Elegant Apps with the Updated Analytics Design App	~			
Analytics App Building				
Include Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Generally Available)			~	
Turn Detailed Data into Eye-Catching Insights with Repeater Widgets (Generally Available)	✓			
Unlock Insights on Salesforce CDP Data (Generally Available)	v			
Change Record Ownership in Tableau CRM			~	
Resize Table Columns and Wrap Text to Fit Content	~			
Add Relative and Dynamic URLs in Link Widgets			~	
Access Tableau CRM Templated App Logs Anytime in Analytics Studio			~	
Improved Experience When Navigating Between Tableau CRM Dashboards			~	
Optimize Dashboard Performance with Global Filters on Live Datasets	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Filters for Live Datasets in Embedded Dashboards Using JSON	~			
Get More Date Grouping Options for Live Data	~			
Explore Google BigQuery Data Directly (Beta)	✓			
Set a Higher Query Limit in Explorer and Dashboard Widgets	✓			
SAQL and SQL		~		
Einstein Discovery				
Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)	▽			
Reveal Untapped Insights from Your Unstructured Data (Pilot)				~
Embed Multiclass Predictions in Salesforce Flows	~			
Fine-Tune Prediction Accuracy with Trending Data (Pilot)				~
Handle Missing Values in Your Datasets (Pilot)				~
Get More Insightful Column Analysis in Einstein Data Reports	~			
Improve Dataset Distributions with Class Weights (Generally Available)	~			
Get Report Insights in More Languages	✓			
Correct Drifting Models Faster with Enhanced Live Data Monitoring	~			
Upload External Models Faster with Automatic Variable Detection	~			
Embed Multiclass Predictions Using the Einstein Predictions Panel	✓			
Build Higher-Quality Models with Data Leakage Detection	~			
Manage Deployed Models Without Redeploying	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Gather Insights Directly from Your Snowflake Schema (Pilot)				✓
Speed Up Story Creation with Smart Sampling (Pilot)				~
Tableau CRM for Everyone				
Get Insights More Easily with Ask Data for Salesforce (Beta)				✓
Add Collections Directly to Your Lightning Pages	<u>~</u>			
Share Dashboard Views Through Collections	~			
Find Your Way with Navigation Breadcrumbs	~			
Analytics Mobile Apps				
View Lenses and Explore Data in the Salesforce Mobile App	<u>~</u>			
Get the Latest Version of Tableau CRM for iOS and Android	~			

Commerce

Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2B2C Commerce, Commerce Einstein, and Salesforce Order Management.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Salesforce B2B and	B2B2C Commerce		
Get Help Faster and Easier	✓			
Promotions for Your B2B Store				
Create and Share Coupons for Your B2B Store	✓			
Deliver Extra Discounts with More B2B Store Promotions per Cart	~			
Offer Fixed Discounts on B2B Store Products	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Combine Discounts Under One B2B Store Promotion	~			
View All Promotions Applied to an Order	~			
Enhance Commerce Promotions with Apex	~			
Promotions Are Manual by Default	~			
Set Decimal Amounts for Promotion Quantities	~			
Import Product Images	~			
View Images in the Product Workspace	~			
Import Products for a B2B Store	~			
Add Products with Fewer Clicks	~			
Assign Media to Product Variations			~	
Create a Purchase Quantity Rule with a Maximum of 100 Million for B2B Stores			~	
Save Time with Default Records for New Stores	~			
Easily Assign a Catalog and Categories	~			
Configure More Searchable Values		~		
Manage Sorting for Search Output			~	
Replace the B2B2C Search Results Component for Improved Search			~	
Learn More About Commerce Search Auto-Correction		~		
Rebuild Search Indexes up to 60 Times per Hour			~	
Understand Preconfigured Permission Sets			~	
Create a Parent-Child Relationship Between Cart Items	<u>~</u>			
Order List Component Is More Accessible	~			
View Order Summaries for Commerce Stores	<u>~</u>			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Commerc	e Einstein		
Extend Commerce Einstein Cookie Privacy to Logged-In Shoppers in B2C Stores			~	
Use Commerce Einstein Recommendations Components Across the B2B2C Shopper Journey	▽			
Choose from More Commerce Einstein Recommendation Use Cases in B2C Stores	✓			
Enhance How Commerce Einstein Displays Recommendations in B2C Stores	▽			
Enable Commerce Einstein in B2B Stores			~	
	Salesforce Orde	er Management		
Process Even Exchanges for Order Items Before Fulfillment			~	
Enjoy Better Data Integrity in Salesforce Order Management Screen Flows			~	
Use Actions to Add Order Items and Combine Get Availability and Find Routes	✓			
Get Better DOM Routing Flow Performance	~			
Prepare for and Manage Omnichannel Inventory Downtime		~		
Use Change Orders Without Price Books		~		

Customization

Get better control over who sees what with enhancements to sharing. Use recently expanded guidance to enable ICU locale formats. View and manage permissions more easily with updates to Salesforce Optimizer and the permission set user assignment experience (Beta).

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Shar	ring		
Enable Stronger Protection for Your Users' Personal Information (Release Update)			<u>~</u>	
Manage Personal Information Fields via Field Set		~		
Share High-Volume and System User Records in Criteria Based Sharing Rules	<u>~</u>			
Use Field Restriction, Restriction, and Scoping Rules in Unlocked Packages	<u>~</u>			
Control the Default Records Your Users See with Scoping Rules (Generally Available)				✓
Use Single Picklists in Restriction and Scoping Rule Criteria	~			
	Globali	zation		
Enable ICU Locale Formats (Release Update)			~	
Connect with Customers Who Speak and Read Yiddish			~	
Use myTrailhead and Workforce Engagement Management in More Languages	<u>~</u>			
Review Updated Term Translations	~			
Prepare for Updated JDK Locale Formats	~			
	Permis	ssions		
Test Permission Set Groups with the calculatePermissionSetGroup() Method		~		
View Improved Critical Permissions Assignments for Manage Users in Optimizer		<u>~</u>		
Manage Permission Sets and Permission Set Group Assignment Expiration Dates with an Enhanced User Experience (Beta)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Expanded Transaction Security Policies for Permission Set Events (Beta)	2.143.04.101.030.0	▽	30.06	- Chable
	External	Services		
Register More Specs with OpenAPI 3.0 Support		~		
Include More Operations with Composition and Polymorphism Support		✓		
Map Unsupported Media Types in Your Registration		~		
Access External Services Actions in Flow as a Guest User		~		
MIME Type Is Changed to Media Type in External Services Help		~		
	Lightning A	pp Builder		
Monitor Your Slowest Desktop Record Pages		~		
Use Orchestrator Work Guide to Connect Users with Tasks (Generally Available)		✓		
Bring in Analytics Assets to Your Lightning Page		~		
	Salesforce	Connect		
Securely Connect Data Across Amazon DynamoDB and Salesforce (Pilot)				~
Monitor Your Background Operations		~		
	АррЕхс	hange		
Find Relevant AppExchange Apps and Experts with Ease	~			

Development

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Lightning Co	omponents		
Write More Robust UI Tests with UTAM (Generally Available)		~		
Enable Third-Party Integrations with Light DOM (Beta)		~		
Create Web Apps with Lightning Web Runtime on Node.js (Developer Preview)		~		
Secure Your Components Better, Stronger, Faster with Lightning Web Security (Generally Available)		✓		
Enablement of Lightning Web Security Begins		~		
Ensure That Your Code Works in Lightning Web Security with New Tools		~		
Invalid HTML Syntax Results in Warnings		~		
Customize Your Datatable with New Features		~		
Scan a Barcode in a Lightning Web Component (Generally Available)		~		
Use Location in a Lightning Web Component		~		
Lightning Components Release Updates	5			
Enforce CORS Allowlist for Lightning Apps (Release Update)			~	
Enable Secure Static Resources for Lightning Components (Release Update)			~	
	Einstein	Vision		
Use Einstein OCR to Detect Handwritten Text (Beta)		~		
	Einstein I	Platform		
Custom Fields withpc Suffix Aren't Supported for Einstein Predictions			<u>~</u>	
AlApplication API Doesn't Support delete()			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More AlApplication Packaging Information			~	
	Visual	force		
Securely Call the Visualforce Remoting API (Release Update)		~		
Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)		✓		
Prevent Consecutive API Navigation Calls (Release Update)		~		
	Ар	ex		
Get Org-Specific Domain Hostnames and Information		~		
Use DataWeave in Apex to Enable Data Transformation to Different Formats (Pilot)				✓
Find Which Apex Classes Implement an Interface (Beta)		~		
Experience Reduced Minimum Time Between Apex Queueable Jobs		~		
	AF	기		
Legacy API Versions 7.0 Through 20.0 will be retired in Summer '22			~	
	Packa	ging		
Remove Metadata Components from Second-Generation Managed Packages (Generally Available)				✓
Specify Package Ancestors Using New Keywords		~		
Require Multi-Factor Authentication for Logins to Subscriber Orgs (Release Update)			~	
Understand Component Behaviors in Managed Packages	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increase Your Licensing Agility with the Partner Licensing Platform (Developer Preview)				▽
Include Field Restriction, Restriction, and Scoping Rules in Unlocked Packages	~			
	Sandb	ooxes		
Updates to Inactive Sandbox Expiration Process		~		
	Platform Devel	opment Tools		
Plan and Test Your System for Scale Using Performance Assistant			~	
Develop Platform Apps with Ease		~		
	Lightning De	sign System		
Customize Components with Lightning Design System Styling Hooks (Generally Available)		▽		
	Salesforce	Functions		
Salesforce Functions (Generally Available)				~
	AppExchang	ge Partners		
Discover Metadata Details with AppExchange App Analytics Subscriber Snapshots				✓
	Change Da	ta Capture		
Receive Change Event Notifications for More Objects		~		
	Platform	Events		
Filter Your Stream of Platform Events with Channels (Beta)		~		
Connect Salesforce Events with Amazon EventBridge in AWS (Pilot)				✓

Einstein Automate

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
MuleSoft Composer for Salesforce			<u>~</u>	
OmniStudio				~
	Orchestrator (Ger	nerally Available)		
Orchestrate Multiuser Processes		~		
Customize Entry and Exit Conditions with Evaluation Flows		~		
Assign Interactive Steps to Groups or Queues		~		
Process Background Steps Asynchronously		~		
Trigger Your Orchestration from Custom Code		~		
Orchestration Debugging (Generally Av	vailable)			
Debug Your In-Progress Orchestration		~		
Debug a Failed Orchestration		~		
Orchestration Deployment (Generally A	Available)			
Package Your Orchestration		~		
Deploy Orchestrations with Change Sets		~		
Orchestration Management (Generally	Available)			
View Orchestration Runs		~		
Cancel Orchestrations		~		
Orchestration Work Items (Generally Av	vailable)			
Increase Productivity with Orchestrator Work Guide			~	
Manage Assigned Work with the Orchestration Work Items List View		~		
Reassign Orchestration Work Items		~		
	Salesfor	ce Flow		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder		·	<u> </u>	
Place Flow Elements Automatically with Auto-Layout (Generally Available)		~		
Visualize All Your Record-Triggered Flows in One Place with Flow Trigger Explorer		~		
Translate and Customize Button Labels in the Flow Screen Footer (Generally Available)		~		
Generate Choice Options from Record Collections		~		
Filter Items into a Collection in Flow Builder		~		
Place More Fields Directly on Flow Screens (Beta)		~		
Define the Run Order of Record-Triggered Flows for an Object		~		
Configure Flows with Your Keyboard and Screen Reader		~		
Open Subflows from the Auto-Layout Canvas		~		
Connect Elements in For-Each Loops to Elements Outside of the Loop		~		
Do More with Terminated Paths in Auto-Layout		~		
Track Flows in Browser Tabs		~		
Easily Add Frequently Used Elements to Record-Triggered Flows via Shortcuts		~		
Flow Runtime				
Two-Column Flow Layouts Are Superseded by Multicolumn Screens		~		
Make Custom Screen Components React to Other Components on the Same Flow Screen (Pilot)				<u>~</u>
Flow and Process Run-Time Improvements in API Version 54.0		~		
Other Changes to Flow Screen Components	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
URL-Launched Screen Flows Use a White Background	~			
Flow Management				
Convert Workflow Rules to Flows with the Migrate to Flow Tool (Beta)		~		
Flow Extensions				
Manage Conversations and Users in Slack with Invocable Actions (Beta)		~		
Flow and Process Release Updates				
Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)			<u>~</u>	
Analyze Screen Flow Usage (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)			~	
Run Flows in User Context via REST API (Release Update)			~	
	Einstein Nex	t Best Action		
Build Einstein Next Best Action Strategies in Flow Builder (Generally Available)		▽		
Show Flow-Generated Recommendations on Lightning App Pages (Generally Available)		▼		

Experience Cloud

Freshen up your site list by archiving outdated sites that have outlived their usefulness, and make space for the shiny new sites that your users need. Create multilingual LWR sites to reach international audiences, and build LWR sites more quickly with new drag-and-drop components. You can also optimize your site's performance with several content delivery network (CDN) enhancements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Archive Experience Cloud Sites (Generally Available)		✓		
Say Hello to the Digital Experiences App in Lightning Experience		~		
Support More Site Members with Experience Cloud Licenses	~			
	LWR 9	Sites		
Create Multilingual LWR Sites (Beta)		~		
Style Your LWR Sites with New Branding Fonts		✓		
Specify the Base Font Sizes for Your LWR Mobile and Desktop Sites		~		
Take Advantage of Improved Site Search and Enhanced CMS Workspaces (Beta)			~	
	Compo	nents		
Let Your Site Users Deactivate Their Account			~	
Use the Overlap, Card, Columns, and Language Selector Components in LWR Sites		✓		
Override Default HTML Tags in the Text Block Component		~		
Build Better Microsites with the Marketing Cloud Form Component (Generally Available)		✓		
Improve Site Performance with the Updated Lead Form Component		~		
Autoplay CMS Collections in Aura Sites		~		
Embed Multiclass Predictions with the Updated Einstein Predictions Component		✓		
	Developer P	roductivity		
Track Events on LWR Sites in Standard Components Enabled with Light DOM		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build Localized Component Labels on LWR Sites with Custom Labels		~		
Get Information About the Current Site in Lightning Web Components		~		
Quickly Bind Data to Components in ExperienceBundle		~		
Troubleshoot Deployment Errors More Easily		✓		
	Site Perfo	ormance		
Get the Service Not Available Page by Default with Salesforce's CDN for Digital Experiences		✓		
Stay on the Target URL When Using the Service Not Available Page	~			
Account Role Optimization Is On by Default for Role-Based Licenses		✓		
Label for Account Role Optimization Setting Was Changed			~	
Switch from Shared to Single Certificates for Sites	~			
Put Your Site in Maintenance Mode While Making Updates		~		
Use Micro-Batching to Process More Self-Registrations on High-Traffic Sites (Generally Available)			<u>~</u>	
Cache More Guest User and Static Content with Salesforce's CDN for Digital Experiences	~			
	Guest Use	r Security		
Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users (Release Update)			✓	
Create Sharing Rules to Retain and Control Guest Users' Product Access (Release Update)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Security ar	nd Sharing		
Set Up Single Sign-On with Slack Credentials		~		
Secure Personal Information Fields from External and Guest Users via Field Set	~			
Grant Access to HVU or System User Records in Criteria-Based Sharing Rules		~		
Share Market Development Fund Data	✓			
HSTS Browser Cache Duration Is Increased	✓			
Run Flows for Guest Users Is Being Deprecated		~		

Field Service

Use the Field Service learning map to navigate setup tasks and find the right help. Onboard faster with the Key Concepts and Glossary. Create more efficient schedules with bundled service appointments that group nearby work, and use the REST APIs to make the bundler changes you need. Shift enhancements help managers balance assignments and accommodate worker preferences, as well as update shifts in bulk. Add flexible criteria-based preventive maintenance plans to keep your assets in shape. Briefcase Builder and related records priming help save time by letting you choose only what you need to download before going offline.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Spotlight on Field	d Service Content		
Chart a Successful Journey with the Field Service Learning Map	~			
Understand Key Concepts and Common Terms in Field Service	~			
	Resource M	anagement		
Bundle Your Service Appointments to Simplify Scheduling			~	
Use Colors to Find Shifts Fast		~		
Be a Scheduling Hero and Quickly Find Shift Candidates	~			
Save Time with Mass Shift Updates	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Limit Nonstandard Shifts and Boost Your Team's Work-Life Balance		~		
Tighten Your Service Resources' Security by Hiding Their Location			~	
Reduce CPU Usage While You're Inactive	✓			
Field Service Settings Tab Uses More Inclusive Language	~			
Define Resource Preference Based on Location and Assets		~		
Create Recurring Absences for Service Resources				
Ensure a Smooth Dispatcher Console Experience When Calling Visualforce Remoting API			~	
Service Appointment Status Updates Are No Longer Unlimited	<u>~</u>			
	Asset Man	agement		
Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria (Generally Available)		✓		
	Administration	and Processes		
Create Account-Specific Work Plans		~		
	Customer E	ngagement		
Deliver Service Anytime, Anywhere with Visual Remote Assistant for Experience Cloud			✓	
Let Customers Request a Remote Visual Support Session			~	
Document Your Sessions with Screenshots			~	
	Mol	oile		
Work More Efficiently with Bundled Service Appointments			~	
Make Appointment Status Changes Easier (Beta)			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Mobile Settings in Lightning Experience	~			
Stop Deep Link Security Dialogs From Interrupting Your Work (Generally Available)			~	
Get Valuable User Feedback Sent to Your Inbox			~	
Choose Your Favorite App to Streamline Emails	~			
Get Right to Work in the Salesforce App from the Actions Launcher	~			
Save Time By Priming Only the Records You Need (Beta)			~	
	REST	API		
Manage Your Bundles Using APIs			~	

Hyperforce

Hyperforce is a new infrastructure architecture that unifies the foundations of the various clouds and allows Salesforce to scale rapidly and securely using public cloud partners. Leveraging the public cloud allows Salesforce to expand quickly to new regions that address your local data storage requirements. Hyperforce fosters innovative growth by using common tools, deployment patterns, security practices, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Salesforce in More Regions with Hyperforce			~	

Industries

Industries solutions have even more goodies for specific business verticals, so you don't have to customize Salesforce yourself. Net Zero Cloud (formerly Sustainability Cloud) gives you new ways to measure and act on your organization's carbon footprint. Financial Services Cloud improves deal tracking and record searches, and adds a Branch Management app. Health Cloud offers identity verification to protect sensitive information. Manufacturing Cloud improves forecasting and SKU management. The Business Rules Engine brings Decision Explainer to help you provide clear reasons for application approvals, rejections, and benefit calculations. We've also made advances in the data processing engine, flows, branch management, rebate management, action plans, and loyalty management, all of which are available for multiple Salesforce clouds.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Net Zero	o Cloud		
Hello Net Zero Cloud			~	
Manage Your Waste Footprint			~	
Set Science-Based Targets			~	
Forecast Carbon Emissions			~	
Manage Supplier Sustainability Data			~	
Achieve Carbon Neutrality with Net Zero Analytics	<u>~</u>			
New and Changed Objects for Net Zero Cloud				
New Connect REST APIs		~		
	Financial Sei	rvices Cloud		
Financial Deal Management				
Record More Data About Financial Deals		~		
Show Details About Financial Deal Parties			~	
Interaction Summaries				
Give Your Users Insights into Accounts and Key Contacts			~	
Interaction Summaries Are Available for More Objects		~		
Prevent Duplicate Interaction Records			~	
Record Alerts				
Keep Clients Informed of Potential Issues with Record Alerts			~	
Interest Tags				
Personalize Client Interactions by Using Interest Tags			~	
Residential Loan Applications				
Give Read-Only Users Edit Access to Residential Loan Applications			~	
Group Members and Details Componer	it			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize Group Members and Details Component			~	
Branch Association				
Branch Association (Beta) Preference Has Been Retired	~			
Insurance for Financial Services Cloud				
Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics	▼			
New and Changed Objects in Financial Services Cloud		~		
REST API		~		
Apex: New Items				
	Health	Cloud		
Identity Verification				
Protect Health Information by Verifying Caller Identity		~		
Verify Callers Before Sharing Sensitive Information		~		
Build Identity Verification Context		~		
Get Verification Data		~		
Extend Your Identity Verification Flows with Custom Flow Screen Components		~		
Candidate Patient Object Is No More			~	
Intelligent Sales Enhancements				
Schedule Planned Cycle Counts from the Desktop	<u>~</u>			
Schedule Ad Hoc Cycle Counts from the Mobile App	~			
Work with the Latest Data When Performing Cycle Counts	~			
Perform Cycle Counts Using the Mobile App	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Your Intelligent Sales Implementation for Your Business		~		
Configure Work Types for Cycle Counts		~		
Medication Review (Formerly Medication	on Management)			
Enjoy More Flexibility with Custom Flows to Add Medications			~	
Get More Information on Each Medication			~	
Know What's Changed in Medication Review Org Preference Settings			~	
Make the Most of the Enhanced Patient Medication Manager Lightning Component	~			
New: Medication Management Add-On				
Protect Patient Safety During Care Transition Using Medication Reconciliation			~	
Find Potential Drug Interactions in a Patient's Medication Regimen			~	
Provider Network Management				
Manage Payment Agreement Terms for Contracts			~	
Gain Flexibility with Custom Contract Payment Agreement Types			~	
Manage Network Participation Records Associated with a Contract			~	
Enable Site User Access for Provider Network Management			~	
Customer 360 Guide for Healthcare Pay	ers			
Explore Healthcare Payer Business Scenarios			~	
Health Cloud Has New and Changed Objects		~		
Health Cloud Has New Invocable Actions				
REST API		~		
	Loyalty Ma	nagement		
Promotion Setup				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Design Business Scenarios to Process Transactions	~			
Update Values Used in Rules with Ease	✓			
Configure Your Business Scenario	~			
Process Transactions According to Your Business Requirements		~		
Launch Flows for Transactions		~		
Make Space for New Ledgers			~	
Target Members with Promotions in Real Time with Interaction Studio			~	
Run a Loyalty Program on B2C Commerce Site				~
Vouchers				
Issue Multiple Use Vouchers Using Existing Voucher Definitions	~			
Modify Issued Vouchers	~			
Get a Loyalty Management License Based on Your Needs				
Try Loyalty Management for Free	~			
Other Changes in Loyalty Management				
Personalize Loyalty Ledgers		~		
Improve Security of Your Member Data with Shield Platform Encryption			~	
New and Changed Objects in Loyalty Management		~		
REST API		~		
New Invocable Action in Loyalty Management		~		
New and Changed Loyalty Management Metadata Types		~		
	Manufactu	ring Cloud		
View Account Forecasts with Exactly the Information You Need			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Generate More Granular Forecasts			~	
Include More Products and Schedules on Your Sales Agreements			~	
Boost Partner Collaboration on Forecasts			~	
Simplify Forecast Calculations			~	
Data Processing Engine Template Enhancements			~	
Do More with Manufacturing Cloud for Service			~	
Develop Accurate Forecasts and Grow Your Business (Generally Available)	~			
New Objects for Manufacturing Cloud		~		
	Consumer G	oods Cloud		
Manage Multiple Markets with Sales Orgs		✓		
Retail Execution Planning				
Create Effective Visits with Visit Templates and Trip Lists		✓		
Create Impactful Promotions with Tactics, Rewards, and Sales Folder		✓		
Manage Product Assortments Better with Listing Modules		~		
Manage Orders Better with Order Templates and Disposal Lists		~		
Offline Visit Planning and Execution				
Handle Orders Efficiently Even When Offline		✓		
Get Accurate Order Prices Offline with Advanced Pricing Setup (Pilot)		~		
Schedule Visits on the Go with the Offline Mobile App		~		
Make Sales Reps Pitch Ready with Sales Folder		▽		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enjoy Quick Access to Third-Party Apps with Quick Access Cards		~		
View Tableau CRM Dashboards with Analytics Cards		~		
Personalize Your Offline Mobile App		~		
Advanced Customer and Product Data	Management			
Manage Customer Data Easily		~		
Handle Products Efficiently by Defining Product Hierarchies and UoMs		~		
Manage Territories with Org Unit Hierarchies		~		
	Public Secto	r Solutions		
Automate Decision Processes by Using Business Rules Engine (Generally Available)			<u>~</u>	
Help Constituents and Auditors to Make Better Decisions			~	
Manage Licenses, Permits, and Inspections Effectively with Data-Driven Insights	~			
Public Sector Solutions Has New Tooling API Objects			~	
REST API		~		
	Industries Comm	on Components		
Data Processing Engine				
Update Data Processing Engine Definitions with Ease		~		
Delete Previous Runs		~		
Find the Sum of a Field		~		
Changed Object in Data Processing Engine		~		
Changed Tooling API Objects in Data Processing Engine		~		
Changed Data Processing Engine Metadata Type		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Changed Objects in Monitor Workflow Services		~		
Batch Management				
Remove Batch Job Runs		~		
Changed Objects in Monitor Workflow Services		~		
Action Plans				
Include More Fields in Action Plan Template Tasks		~		
Customize Fields in the Action Plans Printable View			~	
Share Action Plans and Action Plan Templates More Easily	~			
Change Owners of Action Plan Templates and Action Plans	~			
Filter Action Plan Templates by Status	~			
Clean Up the Action Plan Templates List			~	
Decision Table				
Increase Outcomes Every Hour		~		
Einstein Relationship Insights				
Get Notified of Relationship Recommendations	~			
Get Relationship Recommendations from Gmail	~			
Intelligent Form Reader				
Enhance Form Field Mapping		~		
Accurately Extract Field Names		~		
Interest Tagging				
Connect REST API		~		
Rebate Management				
Visualize Progress Against Rebates with Ease			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Detailed Information About Aggregate Rebate Transactions			~	
Automate Rebate Calculations with a New Rebate Orchestration Flow			~	
New Objects for Rebate Management		~		
New Invocable Actions in Rebate Management		~		
New Action Type Value in Rebate Management		~		
Record Alerts				
Connect REST API		~		
Apex: New Items				
Record Alerts Has New Metadata Types		~		
Record Alerts Has New Tooling API Objects		~		

Mobile

Get more done in the Salesforce mobile app with new features like the new full-width tablet app experience and a new Mobile Home card for Pinned Lists Use the new Related Record Priming beta for more accurate and efficient record filtering. Plan for the retirement of tablet app experiences on all devices and the Managed Public Option for Mobile Publisher on Android devices.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Salesforce N	Mobile App		
Everything That's New in the Salesforce	Mobile App			
Salesforce Mobile App Requirements Have Changed	~			
Run Your Business on Tablets (Generally Available)			~	
Quickly Reference Lists with the Mobile Home Pinned Lists Card	~			
Mobile Home Enablement Just Got Easier	~			
Easily See and Monitor Mobile Security Policies Across Orgs				~

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Plan for Retirement of Two Tablet Experiences			~	
Scroll Through Keyword Based Search Results			~	
Do More with Improved Deep Linking on iOS			~	
	Briefcase	Builder		
Get Relevant Data in Briefcase Builder with Related Record Priming (Beta)			~	
	Mobile P	ublisher		
Plan for Managed Public Option for Android's Retirement	✓			
Easily Debug Your Experience Site with Playground App Simulator		~		
Scan Barcodes with Custom Lightning Web Components		~		
Use Location Features in Your Mobile Publisher App			~	
Enjoy More Notification Options with Marketing Cloud Tools			~	
Let Experience Cloud Site Users Deactivate Their Account			~	

Pardot

Enjoy more control over enhanced landing pages, which now include layout templates, header code support, and inline form styles. You also get Lightning templates for Salesforce Engage, and expanded automation support and Einstein Engagement Frequency for enhanced emails. Get more out of Pardot with new objects for Version 5 of the API, and the new Tracking and Consent JavaScript API. Plus, prepare for email privacy changes with Pardot's new open rules audit tool.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Marketin	ng Assets		
Enhanced Landing Page Experience				
Customize Pardot Form Styles in the Enhanced Landing Page Builder			~	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set a Redirect for Unpublished Landing Pages			~	
Add Scripts to Landing Pages			~	
Build Faster with Page Layouts and Breadcrumbs			~	
Changes to Content Last Saved Fields			~	
Create Custom Components for Email Template Builder	▽			
Choose Which Email Template Types Are Available in Salesforce Engage		₹		
Reduce Email Fatigue with Einstein Engagement Frequency			~	
Improvements to the Pardot Slack Connector (Beta)				
Bot Protection Is Added to Forms			~	
Choose Your A/B Test Version at a Glance	✓			
Update Your Google Ads Connector for Pardot	✓			
	Autom	nation		
Push Emails from Lightning Experience to Automation Rules and Completion Actions	✓			
Specify Tracker Domains for Automated Emails in Lightning	▽			
Filter Pardot Automations with Einstein Account Tier Field			~	
Prepare Your Pardot Automations for Email Privacy Changes	~			
Activate External Activity Objects for Automation More Easily		~		
Plan for Pardot Drip Program Retirement	~			
Drip Program Reports Are Moving	✓			
	Metrics and	Reporting		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improved Thresholds for Metrics Guard Filtering	▽			
Sender Field Was Changed in B2BMA Dataset			~	
Visitor Filters Apply Retroactively	~			
	Pardot APIs	and Admin		
Pardot API: New and Changed Items		~		
Pardot Classic App Is Being Retired	~			

Quip

Get the most out of your Salesforce data with Quip. Choose whether you want your users to work in Quip with documents that auto-fill with Salesforce data or in Lightning Experience with Quip documents embedded in Salesforce records. Measure and report on your users' document engagement with faster and more thorough Quip metrics. Use multi-factor authentication to protect your Quip data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
When to Expect Quip Features	✓			
Get Ready for Upcoming Multi-Factor Authentication Enforcement			~	
Keep Your Quip Users Working in Lightning Experience with Admin Control Enhancements		✓		
See Which Quip Users Are Connected to Salesforce		~		
Gain Deeper Insights with Faster Quip Engagement Metrics		~		
Get Better Performance and Save Time with the Quip Automation API		~		
Get More Flexibility and Increased Stability with Quip's APIs		~		
Gain More Efficiency with Quip CLI		~		
Get the Enhanced Quip Experience	✓			

Revenue

Enhanced domains don't support new plugins, and we're enforcing data restrictions for Access permission sets. Browser performance improvements are coming, and so is default enforcement of encrypted customer IDs in Payeezy ACH payment methods. Prevent inaccurate credit allocations for invoices with header-level payment allocations. We fixed an error with crediting invoices that have equal total amounts and balances due to payment and debit allocations. Review new order and order product standard field permission requirements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
rediole	Salesfor	•	зетор	enable
Data Restrictions Are Enforced for Access Permission Sets			~	
Updates to Access Permission Sets				
Get Ready for Browser Performance Improvements for Salesforce CPQ (Release Update)			~	
New Permission Requirements for Standard Order and Order Product Fields				
	Salesford	e Billing		
Prevent Inaccurate Credit Allocations for Invoices with Header-Level Payment Allocations				
Encrypted Customer IDs Are Enforced by Default for Payeezy ACH Payment Methods			~	
Behavior for Crediting Invoices with Matching Balances and Total Amounts Due to Allocations Was Corrected			~	
New Permission Requirements for Standard Order and Order Product Fields				

Sales

Use Revenue Intelligence to generate more revenue with performance dashboards, analytics, and intuitive pipeline visualizations. Pipeline Inspection adds insights about deal progress and engagement. See transcripts for voice and video calls. Enjoy an improved setup experience for Collaborative Forecasts. Create more engaging email content with custom components in email templates created with Email Template Builder. Plan territories with help from overlays using choropleth maps and other boundaries in Salesforce Maps Territory Planning. High Velocity Sales users can start using sales cadences without building their own.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Revenue In	telligence		
Generate More Revenue and Build Stro	nger Pipelines with Ro	evenue Insights		
Understand Your Revenue Performance in a Snap with the Overview Dashboard	✓			
Improve Team Productivity with the Team Performance Dashboard			~	
See Your Bottom Line with the Sales Performance Dashboard			~	
See Pipeline Changes in a Dynamic Chart			~	
	Pipeline Ir	nspection		
Get More Insights About Opportunity Progress in Pipeline Inspection	✓			
Get Activity and Engagement Details in Pipeline Inspection	✓			
See Pipeline Changes from the Flow Tab			~	
Edit Opportunity Fields Inline in Pipeline Inspection	✓			
Track Territory and Opportunity Team Progress in Pipeline Inspection	~			
	Core Sales	Features		
Collaborative Forecasts				
Experience a More Efficient Collaborative Forecasts Setup		▽		
Get Insights from Core Forecasting KPIs Quickly		~		
See Recent Changes in Forecast Categories		~		
Choose Which Opportunity RecordTypes to Include or Exclude from Your Forecasts		~		
Enterprise Territory Management				
Exclude Specific Accounts from Territory Assignment Rules	~			
Track Changes to Territory Assignments	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Status of Territory Assignment Rule Jobs Programmatically			~	
Products				
Set Organization-Wide Sharing for Products (Release Update)			~	
Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)			<u>~</u>	
	Sales Enablemer	nt (myTrailhead)		
myTrailhead Is Now Part of Sales Enablement		~		
Preview Modules from Your Trailmaker Content Workspace		~		
View and Download Published Content More Efficiently		~		
	Productivit	y Features		
Einstein Activity Capture				
Change the Time Frame Used When Emails Are Initially Added to the Activity Timeline		~		
Review All Einstein Activity Capture Settings When Creating a Configuration		~		
Decide Whether to Share Sensitive Emails with Other Users			~	
See Activity Metrics Data for Emails Sent and Received		~		
Delete Accounts Connected to Einstein Activity Capture	✓			
Finish Your Move from Lightning Sync		~		
Log In to Google Again to Continue Syncing Contacts	~			
Email Experience				
Adjust List Email Settings for Inbox Users	✓			
Analyze List Email Performance with Custom Reports	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Verify Your Email Address to Send Email Through Salesforce			~	
Email Templates				
Create Custom Components for Email Template Builder	~			
Activities				
Learn More About Voice and Video Calls in the Activity Timeline	~			
See More Filtering Choices in the Activity Timeline	~			
Skim More Info in the Streamlined Activity Timeline	~			
Sort Past Activities by the Completed Date			~	
Salesforce Inbox				
Change Settings for List Emails Sent from Lightning Experience	~			
Track Engagements for Emails with Multiple Recipients Sent from Inbox		~		
Inbox Mobile App	~			
WDC (Legacy Work.com)				
WDC (Legacy Work.com) Is Being Retired	~			
	Salesford	ce Maps		
Salesforce Maps				
Build Marker Layers Easily		~		
Map New and Updated Shape Layers		~		
Salesforce Maps Territory Planning				
Overlay Metrics and Other Borders		~		
Clean Up Deleted Datasets and Their Alignments		~		
Map New and Updated Boundaries		~		
Other Enhancements in Salesforce Maps Territory Planning		~		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Maps Advanced				
Create Routes from External Apps and Custom Workflows		~		
Salesforce Maps Live Tracking				
Build Live Layers Easily		~		
	Salesforce	Meetings		
Review and Update Record Stages in Salesforce Meetings			~	
	Einstein Conver	sation Insights		
Access Transcripts for Voice and Video Calls	~			
See Conversation Data in More Places	~			
See Coaching Recommendations in Your Call Highlights Email	<u>~</u>			
Adjust the Frequency of Call Highlights Emails		~		
	High Velo	city Sales		
Start Selling Fast with Included Sales Cadences	~			
Capture and Add New Prospects to Sales Cadences with a Bot Template			~	
Track Engagements for Multi-Recipient Emails	~			
See Call and Email Engagement for Contacts on Accounts			~	
Pause Sales Cadence Targets for a Specific Length of Time	<u>~</u>			
Understand the Sales Cadence History of Your Prospects	~			
High Velocity Sales Will Soon Be Sales Engagement	~			
Other Enhancements to High Velocity Sales	~			
Sales Cloud for Slack (Beta)				~

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Integration v	with Google		
Gmail Integration				
Track Engagements for Multi-Recipient Emails in the Gmail Integration with Inbox		~		
Lightning Sync for Google				
Update Your Google API Settings for Contact Sync Before Spring '22			~	
Check Out Einstein Activity Capture Improvements for Google Customers			~	
	Integration wi	ith Microsoft [®]		
Teams Integration				
Get the Salesforce Information You Need During Microsoft Teams Meetings	~			
Outlook Integration				
Track Engagements for Multi-Recipient Emails in the Outlook Integration with Inbox		~		
Support in Older versions of Outlook and Windows Ending			~	
Support Is Available for the Outlook Integration in the New Outlook for Mac	~			
Lightning Sync for Microsoft® Exchange	•			
Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers			~	
Finish Your Move to Einstein Activity Capture		~		
Salesforce for Outlook				
Salesforce for Outlook Is Retiring in June 2023	~			
Find Version-Specific Salesforce for Outlook Release Notes	~			

Salesforce CDP

Get deeper integrations with Salesforce partners and products to expand the power of Salesforce CDP, our self-service customer data platform. AppExchange partners and developers can now build and share external activation platforms, letting you expand your activation capabilities with familiar solutions. There's a new SDK to unify Salesforce CDP and Marketing Cloud MobilePush data for messages and insights. And look out for updated documentation to help you on your Salesforce CDP journey.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Package and Deploy Ingestion API Data Streams for Easy Reuse	Endoled for Osers	✓ ✓	зеюр	Chable
Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform	<u>~</u>			
View All Identity Resolution Summary Statistics Together	~			
Test Multiple Identity Resolution Rulesets Faster	~			
Track Known and Anonymous Individual Profiles	~			
Share a Mobile SDK Across Salesforce CDP and Marketing Cloud MobilePush	~			
View Dynamic Profile Explorer Data Using Lightning Builder	~			
Build Streaming Insights with Insight Builder	~			
Create Complex Metrics on Metrics with Insight Builder	<u>~</u>			
Build More Sophisticated Insights with New Functions	<u>~</u>			
Create Data Actions on Streaming Engagement Data to Drive Automations	<u>~</u>			
Package an External Activation Platform	~			
Create Better Segments with Different Individual Entity Rulesets	~			
Save Time with More Reliable Segment Publishing	<u>~</u>			
Create Segments with B2C Commerce Attributes	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Gain Insight from Segment and Activation Counts in Publish History	~			
Reach More Customers with External Activation Platforms	~			
Unlock Tableau CRM Insights on Salesforce CDP Data	~			
Use Universal ID Lookup API to Query Across Salesforce CDP	~			
Use Query V2 API to Connect to Java classPath Tools	~			
Salesforce CDP API: New and Changed Items		~		
Navigate the Salesforce CDP Journey	✓			
Download Release Notes PDF for Salesforce CDP Releases Before Winter '22	✓			

Salesforce CMS

Explore beta features like enhanced CMS workspaces and improved site search, and learn about how Digital Experiences is the renamed way to access the Salesforce CMS app in Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce CMS App Is Now Digital Experiences in Lightning Experience		~		
Try Out Improved Site Search and Enhanced CMS Workspaces (Beta)			~	

Security, Identity, and Privacy

Keep your implementation running securely and smoothly with improved Platform-driven security solutions. Refine how users access your sites, apps, and implementations with domain improvements, built-in authenticators (generally available), single sign-on with Slack, and more authentication options. Preference Center (beta) joins the Privacy Center team, helping customers define their communication preferences. Shield products integrate with a wider range of features and clouds. View more metrics in Security Center. And the new Security Policies (beta) feature in Security Center helps you manage Health Check baselines from a central location for all tenants.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Dom	nains		
Disable Redirections from Your Previous My Domain		~		
Enable Enhanced Domains (Release Update)			~	
Integrate Salesforce Edge Network on Hyperforce	✓			
HTTP Strict Transport Security (HSTS) Cache Duration Is Increased	~			
	Identity and Acco	ess Management		
Built-In Authenticators as a Verification Method Are Now Generally Available			~	
Salesforce Support Users, Partner Support Users, and Subscribers with High-Assurance Sessions Bypass Multi-Factor Authentication During Log In As				~
Let Users Access Salesforce with Slack Credentials			~	
Give Authorized Access to Einstein Bot APIs	~			
JWT Bearer Flow Supports High Assurance Sessions		~		
Disable Users from Logging Into an Org or Experience Cloud Site with Login Credentials as URL Query String Parameters (Release Update)	▼			
Securely Update Email Addresses and Reset Passwords (Release Update)			~	
Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)			<u>~</u>	
Manage Single Sign-On User Mappings		~		
Use a SAML Digest Algorithm Based on Your Request Signature Method		~		
	Privacy	Center		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Build and Publish Consent Forms with Preference Center (Beta)		~		
	Salesford	ce Shield		
Event Monitoring				
Craft Custom Transaction Security Notification Emails			~	
Unlock Automated Responses to Detected Threat Events with Flows			~	
Monitor Changes to Permission Sets and Permission Set Groups (Beta)		~		
Identify Connected Apps that Send API Requests			<u>~</u>	
Shield Platform Encryption				
Encrypt Users' Email Addresses (Generally Available)			~	
Encrypt Social Persona and Social Post Fields			~	
Encrypt Your Loyalty Program Member Data			~	
	Security	Center		
Monitor All Connected Apps		~		
Deploy Security Policies (Beta)		~		
See More Metrics in Security Center		~		
	Other C	hanges		
Create HTTPS Hyperlinks by Default	<u>~</u>			

Service

Enjoy a range of new Service Cloud features that help you and your team deliver efficient, flexible service. Use Omni-Channel Flows to dynamically route customer calls and messages to the preferred agent or bot. Let contact center supervisors access real-time Amazon Connect metrics and listen in on calls with Service Cloud Voice. Build fully functional bots with a new bot template and the user-friendly Conversation Canvas, or use the Einstein Bots API platform. Swiftly triage incidents with new Incident Management features like SLA management tools and Omni-Channel support. And meet staffing needs and make scheduling decisions with new tools in your Workforce Engagement toolbox, including historical adherence metrics.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
	Chan	•	•	
Voice				
Route Calls with Omni-Channel Flows (Generally Available)	✓			
Boost Quality Assurance with Supervisor Call Monitoring	✓			
Launch Amazon Real-Time Metrics Dashboard from Omni Supervisor	~			
Track Agent Downtime with Presence Status Syncing			~	
Share Voice Calls with Universal Call Recording			~	
Respect Agent Capacity for Voice Calls (Beta)			✓	
Match Callers to End User Records with Phone Channels (Generally Available)			~	
Transfer Callers to Available Agents	~			
Make Outbound Calls Correctly With Phone Number Auto-Formatting	~			
Create Custom Call Settings for Your Agents in Omni-Channel		~		
Monitor Service Cloud Voice Issues with Amazon CloudWatch			~	
Set Up Voice with Partner Telephony from Amazon Connect in Fewer Steps		~		
Improve Transcriptions with Contact Lens for Amazon Connect (Pilot)			~	
Enhance Transcriptions with Custom Vocabulary and Vocabulary Filters			~	
Mitigate the Log4j Security Vulnerability in an Amazon Contact Center			~	
Get the Enhanced Service Cloud Voice Experience	~			
	Rout	ting		
Manage All Agents from Omni Supervisor	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Focus Supervisors' Attention on Key Queues and Skills		~		
Invoke an Omni-Channel Flow to Route Non-Real-Time Objects	~			
	Einstein fo	or Service		
Einstein Bots				
Reach More Audiences with Multiple Language Einstein Bots (Generally Available)		~		
Build Your Bot with Confidence in Conversation Canvas		~		
Launch Einstein Bots Anywhere with the Einstein Bots API (Beta)		~		
Update Your Active NLP Bot		~		
Einstein Bots Analytics		~	~	
Get More from Your Knowledge Base with Article Answers Improvements (Beta)	~	~		
Branch Out with the New Sales Bot Template		~		
Build Trust with New Einstein Bot Certifications		~		
Einstein Classification				
View Savings at a Glance with the Einstein Case Classification Value Dashboard			~	
Einstein Article Recommendations			~	
	Workforce E	ngagement		
Prepare for Demand with Long-Term Forecasts	~			
Tackle Staffing Requirements with Long-Term Capacity Plans	~			
Learn from Historical Adherence to Build Better Schedules			~	
Save Time with Mass Shift Update	✓			
Set Date Ranges with Ease on Workload Histories and Intelligent Forecasts	~			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Limit Non-Standard Shifts and Boost Agents' Work-Life Balance	~			
Improve Coverage with Scheduling Across Secondary Territories	~			
Streamline Configuration with Easy-to-Find Tools			~	
Use Color to Find Shifts Fast	✓			
Let Your Call Center Teams Work in Their Language	▽			
	Incident Ma	nagement		
Fix Incidents Faster with Integrated Paths to Resolution	▽			
Understand an Incident's Full Impact with Related Lists	✓			
Simplify Incident Management Setup with Preconfigured Page Layouts	✓			
Maintain Customer Trust During an Outage with Service Level Agreements	✓			
Route Incidents to the Right Team with Omni-Channel	✓			
	Swarmin	g (Beta)		
Swarm on a Case to Resolve Customer Issues (Beta)				
	Service Slack Ap	p Release Notes		
Swarm on a Case in Slack (Beta)				
	Know	ledge		
Share Knowledge Article Links that Don't Expire	~			
Click an Image for a Larger View	~			
Get Accurate Knowledge Article View Counts	▽			
	Other C	hanges		
Move a WhatsApp Number to Salesforce Messaging				~

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)	✓			
Encrypt PII Data in Social Customer Service			~	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			~	

Safety Cloud

In today's uncertain health environment, vaccines and testing are critical for getting people together more safely. Also critical for organizations are secure, personalized, and timely communications about in-person gatherings that help build trust between them, their personnel, and their consumers. With Safety Cloud, organizations can create safer and more trusted events and return-to-work experiences.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver Safer In-Person Experiences for Event Staff and Attendees with Safety Cloud				✓
Generate QR Codes Automatically for Health Verifications				~

Health Verification

Optimize how you manage Health Verification records by assigning them to the user's Person Account. Reduce the likelihood of user error by launching Health Verification forms with customer data pre-filled. Attend to problematic health verifications efficiently with a special queuing option. Use custom metadata types to improve how you manage Health Verification FAQ content and Health Verification notifications.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Optimize Health Verification Records Management with Person Accounts				~
Complete Health Verifications Quickly and Easily				~

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Route Health Verifications to the Needs Review Queue				✓
Customize Health Verification Notifications				~
Create FAQ Content More Easily with Custom Metadata Types				~

Supported Browsers

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 browsers supported for Lightning Experience with this difference: 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 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.

Desktop and Laptop Browsers

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

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

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



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

Tablet Browsers

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

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.



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

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



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

Supported Browsers for Tableau CRM

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

Salesforce Overall

Check out what's blooming in Spring '22. Multi-factor authentication is required starting February 1, 2022. Choose where your prompts and walkthroughs appear. Salesforce Checkout has been replaced with the Your Account app. In Surveys, sentiment analysis can be run on real-time and historical text responses.

IN THIS SECTION:

General Enhancements

Multi-factor authentication is required starting February 1, 2022. Keep working with tab-focused dialogs. Improve the performance of assistive technology.

User Engagement

Control when and where your prompts and walkthroughs appear with more location options. Add images to your in-app guidance by linking to them from a URL. Allow users to submit feedback on content that they complete in Learning Paths.

Your Account App

The Your Account app now replaces Salesforce Checkout. Manage renewals in the Your Account app. Use free Identity licenses for Your Account app users. Contract list and detail views are improved. The Your Account app is now available in Salesforce Classic as well as Lightning Experience.

Lightning Console

Start new console sessions without loading workspace tabs from previous sessions.

Salesforce Surveys

Discover and learn about customer feedback management journey with a learning map.

Salesforce Scheduler

Use Shifts to easily manage service resource availability across service territories with ever-changing working hours. Create holidays to avoid appointment bookings for hours or days when a service territory is closed. Use data translation for standard and custom fields of objects to let users build the Salesforce Scheduler experience in multiple languages. And present only the work type groups that are most relevant to a customer by using the Filter by Work Type Group IDs attribute.

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 Al-powered Einstein Search. The more users engage with Einstein Search, the more likely Einstein returns the most useful search results.

Salesforce Data Pipelines

Use datasets between Data Pipelines and Tableau CRM, and manage recipe runs with improved event-based scheduling that waits until other runs complete.

General Enhancements

Multi-factor authentication is required starting February 1, 2022. Keep working with tab-focused dialogs. Improve the performance of assistive technology.

IN THIS SECTION:

Get Ready for the Multi-Factor Authentication Requirement

Starting February 1, 2022, customers are contractually required to use multi-factor authentication (MFA) when accessing Salesforce products. To satisfy this requirement, you can turn on MFA directly in Salesforce or you can 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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '24.

Improve Salesforce Compatibility with Assistive Technology

To make Salesforce compatible with assistive technology, like screen readers, disable the Load Lightning Pages While Scrolling preference, which is enabled by default in users' personal settings. When this preference is enabled, it turns on Progressive Page Rendering.

Allow Prototyping of Your Data with Einstein Pilot Consent

Let Salesforce data scientists do prototyping and exploration with your data so that you can work smarter. Track where your customers are focused. For example, when users search for content or use an app, services can observe what customers are paying attention to and find patterns to best advertise their content. Grant access only to the apps and objects that you choose. Specify the data that you want us to analyze, and we'll do the rest.

Get Ready for the Multi-Factor Authentication Requirement

Starting February 1, 2022, customers are contractually required to use multi-factor authentication (MFA) when accessing Salesforce products. To satisfy this requirement, you can turn on MFA directly in Salesforce or you can 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, according to the Salesforce Trust and Compliance Documentation, all Salesforce customers are contractually required to use MFA for direct and SSO logins to Salesforce products.

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 that 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 implement and roll out MFA:

- 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**.
- Get customizable templates for rollout planning and change management by downloading the MFA Rollout Pack.
- Make sure that your implementation satisfies the terms of the MFA requirement with the MFA Requirement Checker.

SEE ALSO:

Knowledge Article: Salesforce Multi-Factor Authentication FAQ

Salesforce Help: Meet the Multi-Factor Authentication Assistant (Right-click to view in a new tab or window.)

External Link: How MFA Works to Protect Account Access (video)

External Link: MFA for Salesforce Customer Site

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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '24.

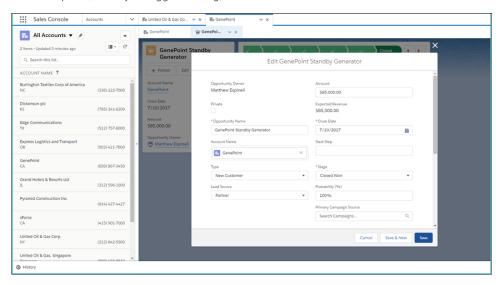
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing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

When: This update is postponed to Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then 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 dialogs require the focus of only the tab that triggered them, allowing users to interact with the rest of the app.

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

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



SEE ALSO:

Release Updates

Improve Salesforce Compatibility with Assistive Technology

To make Salesforce compatible with assistive technology, like screen readers, disable the Load Lightning Pages While Scrolling preference, which is enabled by default in users' personal settings. When this preference is enabled, it turns on Progressive Page Rendering.

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

How: To disable the Load Lightning Pages While Scrolling preference from your personal settings, enter *Advanced User Details* in the Quick Find box, and then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, and then select **Personal Information**

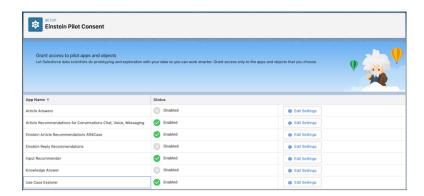
Allow Prototyping of Your Data with Einstein Pilot Consent

Let Salesforce data scientists do prototyping and exploration with your data so that you can work smarter. Track where your customers are focused. For example, when users search for content or use an app, services can observe what customers are paying attention to and find patterns to best advertise their content. Grant access only to the apps and objects that you choose. Specify the data that you want us to analyze, and we'll do the rest.

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

Who: This feature is available to admins participating in an Einstein pilot program.

How: From Setup, in the Quick Find box, enter *Einstein Pilot Consent*. Edit settings for the apps and objects you want to grant access to.



SEE ALSO:

Einstein Release Notes

Salesforce Help: Grant Access to Your Einstein Pilot Data For Prototyping (Right-click to view in a new tab or window.)

User Engagement

Control when and where your prompts and walkthroughs appear with more location options. Add images to your in-app guidance by linking to them from a URL. Allow users to submit feedback on content that they complete in Learning Paths.

IN THIS SECTION:

Choose Where Your Prompts Appear

Now you can choose the page and app that you want your prompt or walkthrough to show up on. Previously, when you created in-app guidance, your only option was for a specified page and app.

Add Images to a Prompt with a URL

Now you have more options for adding images to your in-app guidance. Make your in-app guidance more engaging by linking to a .jpg, .jpeg, .png, or .gif file. Use animated .gifs to further articulate the guidance in a prompt. Link to images instead of uploading them to save time and storage space.

Explore More Resources in the Guidance Center

Find the most current Trailhead modules, videos, and more for setting up Digital Engagement, Financial Services Cloud, and Pardot in the Guidance Center.

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.

Format Body Text in Floating Prompts

You can now format body text in single floating prompts and prompts used in walkthroughs. Using the rich text editor when you set up your body text permits you to bold, italicize, and underline your text to make the prompt more noticeable. Don't like how you formatted your body text? Use the format reset to remove all the formatting. Also, with this change, the character count increases to 300 because HTML formatting includes more characters.

Gather User Feedback for Trailhead and myTrailhead Content in Lightning Experience

Give users the opportunity to send feedback about the Trailhead or myTrailhead modules that they complete in the Learning Paths panel or the Learning Home app in Lightning Experience. When a user completes an assigned module, they can rate the module on a five-star scale. For myTrailhead content, your company can review all the ratings that users submit and use the feedback to quide content planning.

Choose Where Your Prompts Appear

Now you can choose the page and app that you want your prompt or walkthrough to show up on. Previously, when you created in-app guidance, your only option was for a specified page and app.

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

How: From Setup, in the Quick Find box, enter *In-App Guidance*, and then select **In-App Guidance**.

As you create a prompt or walkthrough, select an option from the Prompt Location dropdown.



SEE ALSO:

Salesforce Help: Considerations for In-App Guidance

Add Images to a Prompt with a URL

Now you have more options for adding images to your in-app guidance. Make your in-app guidance more engaging by linking to a .jpg, .jpeg, .png, or .gif file. Use animated .gifs to further articulate the guidance in a prompt. Link to images instead of uploading them to save time and storage space.

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

How: From Setup, in the Quick Find box, enter In-App Guidance, and then select In-App Guidance.

As you create a prompt or walkthrough, click Link to an image with a URL, and then enter the image's URL.



Salesforce Help: Considerations for In-App Guidance

Salesforce Help: Define Prompts

Salesforce Help: Define Walkthroughs

Explore More Resources in the Guidance Center

Find the most current Trailhead modules, videos, and more for setting up Digital Engagement, Financial Services Cloud, and Pardot in the Guidance Center.

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

Why: The Guidance Center includes these new resources.

- **Get Started with Digital Engagement and Messaging**—With Service Cloud Digital Engagement you can have personalized 1-to-1 conversations with customers on their preferred channels. Understand the basics, set up messaging, and learn more about Omni-Channel setup.
- **Get Started with Financial Services Cloud**—Review suggested learning resources for wealth management, mortgage, or insurance.
- **Get Started with Pardot**—Unite your marketing and sales departments so that they can work better together. Get to know Pardot's B2B marketing automation features by reviewing setup, lead nurturing, and reporting resources.

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 and Enhancing Salesforce (Right-click to view in a new tab or window.)

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.

Floating prompt	Instructs admins to activate Messaging.
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Floating prompt	Instructs admins to assign Messaging user permissions.
Floating prompt	Instructs admins to set up routing for Messaging.
Floating prompt	Highlights tips and best practices for user management to admins.
Docked prompt	Encourages admins to set up email to case in Sales Cloud.
Docked prompt	Encourages admins to set up Gmail integration with Salesforce.
Docked prompt	Notifies admins when pages have too many elements that can affect performance.
Docked prompt	Announces a new Salesforce tablet experience and reminds admins to enable it.
Docked prompt	Highlights how to use conditions and actions to design a process rule for Loyalty Management.
Walkthrough	Highlights tips and best practices for Process Rules and Process Parameters related lists for Loyalty Management.

How: Salesforce in-app content appears without any setup.

If you think this content isn't applicable to your users, 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**.

SEE ALSO:

Salesforce Help: Salesforce In-App Content in Lightning Experience (Right-click to view in a new tab or window.)

Format Body Text in Floating Prompts

You can now format body text in single floating prompts and prompts used in walkthroughs. Using the rich text editor when you set up your body text permits you to bold, italicize, and underline your text to make the prompt more noticeable. Don't like how you formatted your body text? Use the format reset to remove all the formatting. Also, with this change, the character count increases to 300 because HTML formatting includes more characters.

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

How: From Setup, in the Quick Find box, enter In-App Guidance, and select **In-App Guidance**. As you create a floating prompt, format your body text using the rich text editor on the upper left of the body text box.

Gather User Feedback for Trailhead and myTrailhead Content in Lightning Experience

Give users the opportunity to send feedback about the Trailhead or myTrailhead modules that they complete in the Learning Paths panel or the Learning Home app in Lightning Experience. When a user completes an assigned module, they can rate the module on a five-star scale. For myTrailhead content, your company can review all the ratings that users submit and use the feedback to guide content planning.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions. This change also applies to myTrailhead, which is available to customers with Enterprise, Performance, or Unlimited editions.

Who: The ability to rate completed modules is available to all users. If your company assigns myTrailhead content in Learning Paths, users with the myTrailhead Branding Management permission can view ratings data from the Trailmaker Settings app in your myTrailhead subdomain.

How: This enhancement is available by default. The ratings data is stored in a system that's compliant with General Data Protection Regulation (GDPR) and isn't visible to users.

SEE ALSO:

Salesforce Help: Learning Paths

Salesforce Help: Show myTrailhead Content in Learning Paths and Learning Home

Salesforce Help: View Learner Feedback for Your Published Modules

Your Account App

The Your Account app now replaces Salesforce Checkout. Manage renewals in the Your Account app. Use free Identity licenses for Your Account app users. Contract list and detail views are improved. The Your Account app is now available in Salesforce Classic as well as Lightning Experience.

IN THIS SECTION:

Say Goodbye to Checkout and Hello to the Your Account App

Get a new, self-service solution for managing your Salesforce subscriptions. The Your Account app replaces Salesforce Checkout.

Give Your Billing Users Free Access to the Your Account App

Use Identity licenses to provide access to the Your Account app to users who don't need full access to Salesforce. You can assign up to 100 free Identity licenses.

Manage Renewals in the Your Account App

When your contract reaches 90 days prior to its renewal date, a message appears on the Your Account app home page and on the contract details page. You can view your contract and confirm the renewal, request changes, or choose not to renew.

Find Key Information at a Glance and Share Contract Pages

The Contract list page is redesigned so that more information about your contract is available without clicking. Collaborate with ease through the shareable Contract list and detail page URLs.

The Your Account App Is Available in Salesforce Classic

The Your Account app is now available in Salesforce Classic. Previously, the Your Account app was available only to Lightning Experience customers.

Say Goodbye to Checkout and Hello to the Your Account App

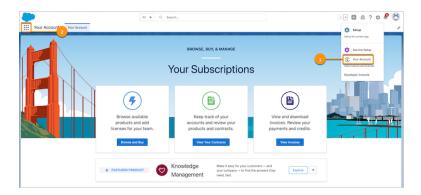
Get a new, self-service solution for managing your Salesforce subscriptions. The Your Account app replaces Salesforce Checkout.

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

Why: If you previously used Salesforce Checkout, a new landing page introduces you to the Your Account app. You can navigate to the Your Account app or learn more about the app.



How: To open the Your Account app, click **Setup** (a).



Select **Your Account** (1) or locate the Your Account app in the App Launcher (2). To view the Your Account app, log in to your Salesforce account.

Give Your Billing Users Free Access to the Your Account App

Use Identity licenses to provide access to the Your Account app to users who don't need full access to Salesforce. You can assign up to 100 free Identity licenses.

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

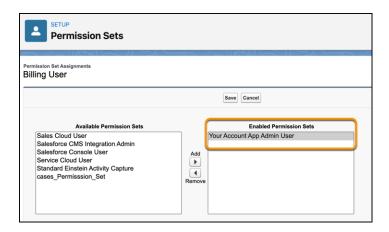


Note: The Your Account App Admin User permission set is needed only for Identity license users. Admins and other Salesforce users who have the Manage Billing permission have access to the Your Account app and don't need the Your Account App Admin User permission set.

How: For access to the Your Account app, create users with Identity licenses.



Assign the Your Account App Admin User permission set to the Identity license users who need access to the Your Account app.



Salesforce Help: Give Your Billing Users Free Access to the Your Account App (Right-click to view in a new tab or window.)

Salesforce Help: Add a Single User

Salesforce Help: Assign Permission Sets to a Single User

Salesforce Help: Salesforce Identity Licenses

Manage Renewals in the Your Account App

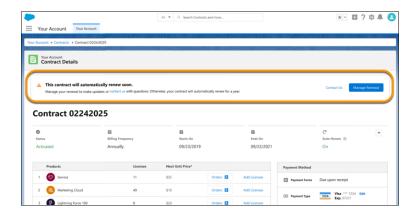
When your contract reaches 90 days prior to its renewal date, a message appears on the Your Account app home page and on the contract details page. You can view your contract and confirm the renewal, request changes, or choose not to renew.

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

How: A new Subscription Time Remaining column in the Contract List page alerts you to your contract status and time remaining.

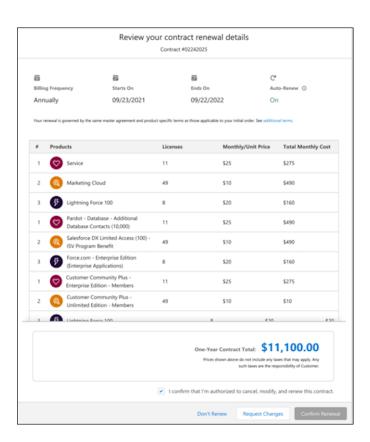


When you view the contract details, a renewal status pane appears at the top of the contract detail page.



Save time and avoid interruption by reviewing your contract, requesting changes, and confirming automatic renewal.

Note: Renewal management is unavailable in some cases. For help with your contract, check in with your Renewal Manager.



SEE ALSO:

Salesforce Help: Manage Renewals (Right-click to view in a new tab or window.)

Find Key Information at a Glance and Share Contract Pages

The Contract list page is redesigned so that more information about your contract is available without clicking. Collaborate with ease through the shareable Contract list and detail page URLs.

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

Why: Previously, the Contract list required you to expand a contract to view key information. Now contract status, billing frequency, contract end date, auto-renew status, and subscription time remaining are available at a glance. You can also filter contracts based on their active status.

The Your Account App Is Available in Salesforce Classic

The Your Account app is now available in Salesforce Classic. Previously, the Your Account app was available only to Lightning Experience customers.

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

Who: To use the Your Account app, users must have the Manage Billing permission or the Your Account App Admin User permission set.

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

Lightning Console

Start new console sessions without loading workspace tabs from previous sessions.

IN THIS SECTION:

Clear Workspace Tabs for New Console Sessions

Start new console sessions without loading workspace tabs from previous sessions. When this option is enabled, opening a new console session clears pinned and unpinned tabs. Only admins with the View Setup and Configuration and Customize Application permissions can enable this feature.

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Start new console sessions without loading workspace tabs from previous sessions. When this option is enabled, opening a new console session clears pinned and unpinned tabs. Only admins with the View Setup and Configuration and Customize Application permissions can enable this feature.

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

How: In the app's App Settings, select **App Manager**. Under Setup and Personalization, select **App Personalization Settings**. Select **Clear workspace tabs for each new console session**.

Salesforce Surveys

Discover and learn about customer feedback management journey with a learning map.

IN THIS SECTION:

Reduce Messaging Costs by Sending Short Survey URLs

Carriers split long messages into multiple messages and charge by volume. Now you can reduce messaging costs by reducing the number of messages required to send your surveys by shortening survey URLs. You can shorten URLs to fewer than 160 characters by using any URL shortening service.

Spotlight on Content

We launched a learning map about the feedback management journey.

Reduce Messaging Costs by Sending Short Survey URLs

Carriers split long messages into multiple messages and charge by volume. Now you can reduce messaging costs by reducing the number of messages required to send your surveys by shortening survey URLs. You can shorten URLs to fewer than 160 characters by using any URL shortening service.

Where: This change applies to Lightning Experience and Salesforce Classic in Partner Developer, Enterprise, Performance, Unlimited, and Developer editions where Salesforce Feedback Management Starter or Growth license is enabled.

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

How: Use the Apex-based interface, sfdc_surveys. SurveyInvitationLinkShortener, to let customers use any URL shortening service, such as bitly, or tiny url. Make a REST API call to the shortening service in the getShortenedURL function provided by the Apex interface.

Spotlight on Content

We launched a learning map about the feedback management journey.

IN THIS SECTION:

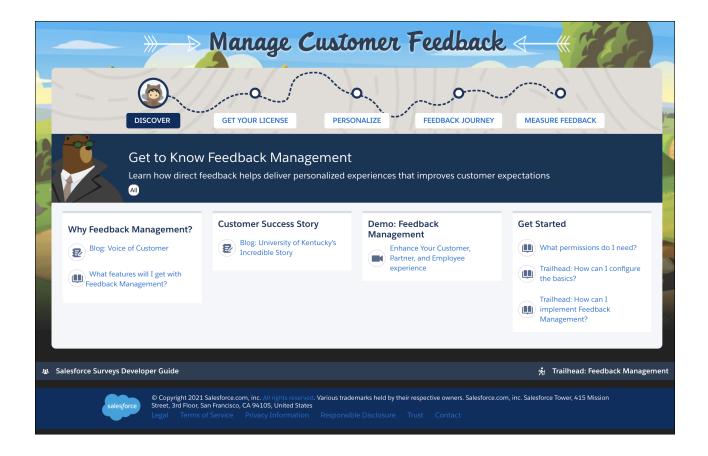
Feedback Management Learning Map

Do you want to explore and learn about ways to manage you customer feedback?

Feedback Management Learning Map

Do you want to explore and learn about ways to manage you customer feedback?

The Salesforce Surveys Feedback Management learning map guides you through different license offerings, setup and implementation, and provides resources for every step of your journey. Check out customer success story, blogs, demos, help topics, and Trailhead links in one place, and set out to deliver personalized experiences that improves customer expectations.



Salesforce Scheduler

Use Shifts to easily manage service resource availability across service territories with ever-changing working hours. Create holidays to avoid appointment bookings for hours or days when a service territory is closed. Use data translation for standard and custom fields of objects to let users build the Salesforce Scheduler experience in multiple languages. And present only the work type groups that are most relevant to a customer by using the Filter by Work Type Group IDs attribute.

IN THIS SECTION:

Manage Service Resource Availability by Using Shifts

Service territory managers can use shifts to easily create, edit, and view the ever-changing working hours of service resources. Service territory managers can also create one or more tentative shifts and assign a service resource to a shift. The assigned service resource can acknowledge and confirm the tentative shift. Service resources can set up and update their own working hours. Service resources can also set up shifts beyond their service territory's operating hours and even set up shifts for more than one service territory. Both service territory managers and service resources can directly create confirmed shifts. A shift is applicable only when confirmed. You can also access the Shift entity via Experience cloud or APIs.

Prevent Appointment Bookings on Holidays

Create holidays to prevent bookings on hours or days when a service territory is non-operational due to state or regional holidays, or due to unforeseen circumstances. When you create a holiday, Salesforce Scheduler shows time slots for only the operational hours or days of the service territory. The available time slots apply to service resources working exclusively for the holiday-linked service territory. Appointments that are already booked for an unplanned holiday require rescheduling.

Support Multiple Languages for Standard and Custom Fields with Data Translation

Translate data of standard—name and description—and custom—text—fields in Work Type Group, Service Territory, and Service Resource objects. Use data translation to support multiple languages for administrators who implement their own screens by using Scheduler APIs and custom SOOLs.

Present Relevant Work Type Groups to Customers

Declutter the Select Work Type Group screen using the Filter by Work Type Group IDs flow attribute. This flow attribute helps you show users the work type groups that they're interested in by filtering the work type groups by their IDs.

Manage Service Resource Availability by Using Shifts

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

How: For service territory managers and service resources, set up roles and assign the required permissions to create and confirm shifts.

To determine the available time slot of a service resource based on their shifts:

- Consider shifts instead of the service territory member's operating hours. Select the **Use service territory member's shift** option in the associated scheduling policy.
- Consider an intersection of shifts and the service territory's operating hours. Select the **Use service territory's operating hours** with shifts option.

SEE ALSO:

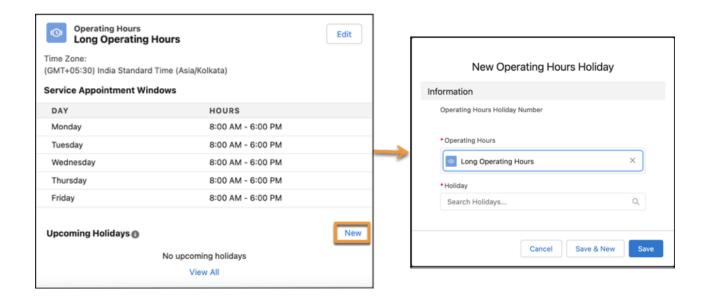
Salesforce Scheduler Help: Manage Shifts in Salesforce Scheduler

Prevent Appointment Bookings on Holidays

Create holidays to prevent bookings on hours or days when a service territory is non-operational due to state or regional holidays, or due to unforeseen circumstances. When you create a holiday, Salesforce Scheduler shows time slots for only the operational hours or days of the service territory. The available time slots apply to service resources working exclusively for the holiday-linked service territory. Appointments that are already booked for an unplanned holiday require rescheduling.

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

How: Create holidays and link them to a service territory. Click **New** for upcoming holidays under operating hours, and then link a holiday to the service territory. To display the complete list of holidays (upcoming and elapsed), click **View All**.



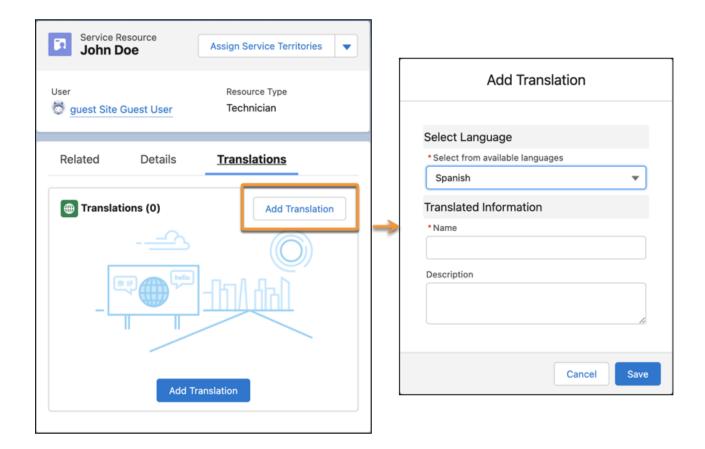
Salesforce Scheduler Help: Set up Holidays in Salesforce Scheduler

Support Multiple Languages for Standard and Custom Fields with Data Translation

Translate data of standard—name and description—and custom—text—fields in Work Type Group, Service Territory, and Service Resource objects. Use data translation to support multiple languages for administrators who implement their own screens by using Scheduler APIs and custom SOQLs.

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

How: From Setup, navigate to Company Information and select **Enable Data Translation**. From setup, enable **Translation Language Settings**, and then add languages and assign translators for each language. To translate data for custom fields, enable translation for the custom fields. To add data translations, add the Translations tab to object pages, and then click **Add Translation**.



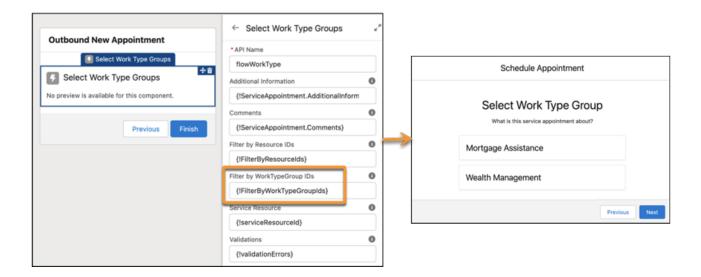
Salesforce Scheduler Help: Manage Objects' Data Translations

Present Relevant Work Type Groups to Customers

Declutter the Select Work Type Group screen using the Filter by Work Type Group IDs flow attribute. This flow attribute helps you show users the work type groups that they're interested in by filtering the work type groups by their IDs.

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

How: Enter a comma-separated list of work type group IDs for the work type groups that you want to show on the Select Work Type Group screen.



Salesforce Scheduler Help: Filter Work Type Groups

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 Al-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

Einstein Search is on by default in Lightning Experience at no extra cost. Einstein Search gives users a smarter search without taking away search features that they rely on. Einstein Search for Knowledge helps service agents and their customers find knowledge articles relevant to their issues. Plus, actionable natural language search filters now let users change the search for better results.

Get Search Results for More Objects

These objects are now searchable.

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IN THIS SECTION:

Einstein Search for Knowledge (Pilot)

Einstein Search for Knowledge gets relevant knowledge articles to your service agents and their customers. It also provides them with a better self-service experience.

Adjust Natural Language Search Results (Pilot)

Sometimes search results aren't what users had in mind. A user can now change how Einstein Search interprets a natural language query by selecting filters that appear at the top of the search results page. The search results are updated in real time based on the new selections.

Use Natural Language Search with Tasks

Natural Language Search (NLS) just got better. Your users can now enter NLS queries for task objects. In the search box, enter phrases like my tasks this week or tasks with status in progress. Einstein Search evaluates the query and finds matching records.

Distinguish Similarly Named Users or Groups with Profile Images

For records that support profile images, instant results and record previews now show the profile image next to the associated record. By default, people and groups support profile photos. If you enable social accounts, contacts, and leads for Twitter, users can also see profile images. You can also enable account logos to replace logos that come from social profiles.

Search Results Objects Page Has a New Name (Beta)

In Setup, the Search Results Objects page is now titled Objects to Always Search. The new title clarifies that Einstein Search always looks at the objects that you choose.

SEE ALSO:

Einstein Release Notes

Einstein Search for Knowledge (Pilot)

Einstein Search for Knowledge gets relevant knowledge articles to your service agents and their customers. It also provides them with a better self-service experience.

IN THIS SECTION:

Search for Knowledge Articles Written in Multiple Languages (Pilot)

Service agents working across the globe can now get Knowledge search results in multiple languages. Search looks for articles that match words in an agent's query and returns the ones that are in their personal profile language and in the Knowledge base default language. To override the defaults or add languages, an agent can modify the Knowledge language filter. Search returns relevant results for all the specified languages. Multilanguage search applies only to the global search box and the Knowledge search sidebar.

Work More Efficiently with Knowledge Search Filters (Pilot)

When a user applies Knowledge filters from the global search box or Knowledge sidebar, the filters persist as long as the user stays in the same browser tab and session. The filters are also synchronized between the search box and sidebar. If the user refreshes the browser, opens a new browser tab, or ends the session, search resets the filters to the defaults.

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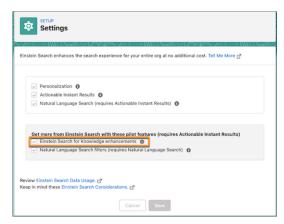
Where: This change applies to Lightning Experience and all versions of the Salesforce Mobile app in Essentials, Professional, Enterprise, Performance, and Unlimited editions with Lightning Knowledge enabled.



Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's

sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: To try the Einstein Search for Knowledge pilot, from Setup, in the Quick Find box, enter *Einstein Search*, and then select **Settings**. In the pilot features box, select **Einstein Search for Knowledge enhancements**.



SEE ALSO:

Salesforce Help: Find Articles Faster with Einstein Search for Knowledge (Pilot) (Right-click to view in a new tab or window.)

Work More Efficiently with Knowledge Search Filters (Pilot)

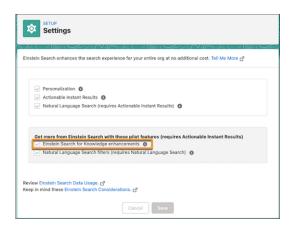
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Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions with Lightning Knowledge enabled.



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How: To try the Einstein Search for Knowledge pilot, from Setup, in the Quick Find box, enter *Einstein Search*, and then select **Settings**. In the pilot features box, select **Einstein Search for Knowledge enhancements**.



Salesforce Help: Persisted Knowledge Search Filters (Pilot) (Right-click to view in a new tab or window.)

Adjust Natural Language Search Results (Pilot)

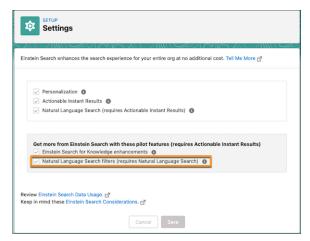
Sometimes search results aren't what users had in mind. A user can now change how Einstein Search interprets a natural language query by selecting filters that appear at the top of the search results page. The search results are updated in real time based on the new selections.

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



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How: To try this feature, from Setup, in the Quick Find box, enter *Einstein Search* then select **Settings**. In the pilot features box, select **Natural Language Search filters**.



SEE ALSO:

Salesforce Help: Change Your Natural Language Search Results Using Filters (Pilot) (Right-click to view in a new tab or window.)

Use Natural Language Search with Tasks

Natural Language Search (NLS) just got better. Your users can now enter NLS queries for task objects. In the search box, enter phrases like my tasks this week or tasks with status in progress. Einstein Search evaluates the query and finds matching records

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

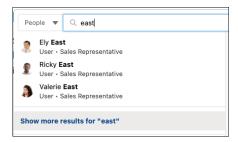
SEE ALSO:

Salesforce Help: Use Natural Language Search to Find Records (Right-click to view in a new tab or window.)

Distinguish Similarly Named Users or Groups with Profile Images

For records that support profile images, instant results and record previews now show the profile image next to the associated record. By default, people and groups support profile photos. If you enable social accounts, contacts, and leads for Twitter, users can also see profile images. You can also enable account logos to replace logos that come from social profiles.

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



SEE ALSO:

Salesforce Help: Set Up Social Accounts, Contacts, and Leads (Right-click to view in a new tab or window.)
Salesforce Help: Enable Account Logos(Right-click to view in a new tab or window.)

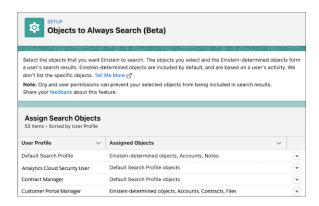
Search Results Objects Page Has a New Name (Beta)

In Setup, the Search Results Objects page is now titled Objects to Always Search. The new title clarifies that Einstein Search always looks at the objects that you choose.

Where: This change applies to Lightning Experience 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.



Salesforce Help: Influence Search Results for Different Users (Beta)(Right-click to view in a new tab or window.)

Get Search Results for More Objects

These objects are now searchable.

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

Object	Product Area
Ad Creative Size Type	Media Cloud
Ad Order Item	Media Cloud
Ad Quote	Media Cloud
Ad Quote Line	Media Cloud
Ad Server	Media Cloud
Ad Server Account	Media Cloud
Ad Server User	Media Cloud
Ad Space Creative Size Type	Media Cloud
Ad Space Group Member	Media Cloud
Ad Space Specification	Media Cloud
Air Travel Emission Factor	Net Zero Cloud
Air Travel Energy Use	Net Zero Cloud
Al Sentiment Result	Industries Common Services
Annual Emissions Inventory	Net Zero Cloud
Annual Emissions Reduction Target	Net Zero Cloud
Appointment Reason	Health Cloud
Background Operation	Platform Services

Object	Product Area
Building Energy Intensity	Net Zero Cloud
Building Energy Intensity Value	Net Zero Cloud
Building Size Category	Net Zero Cloud
Bundled Care Fee Agreement	Health Cloud
Calculation Matrix	Insurance Cloud
Calculation Matrix Row	Insurance Cloud
Calculation Procedure	Insurance Cloud
Carbon Emissions Scope Allocations	Net Zero Cloud
Carbon Emissions Scope Allocation Values	Net Zero Cloud
Claim Recovery	Insurance Cloud
Commission Schedule	Insurance Cloud
Commission Schedule Assignment	Insurance Cloud
Coupon	Commerce Cloud
Data Action	Marketing Cloud-Customer Data Platform
Data Action Target	Marketing Cloud-Customer Data Platform
Data Connection Gcs	Marketing Cloud-Customer Data Platform
Data Connector Credential	Marketing Cloud-Customer Data Platform
Data Connector Gcs	Marketing Cloud-Customer Data Platform
Data Lake Object Instance	Marketing Cloud-Customer Data Platform
Electricity Emissions Factor Set	
Emissions Activity	Net Zero Cloud
Emissions Forecast Factor	Net Zero Cloud
Emissions Reduction Commitment	Net Zero Cloud
Emissions Reduction Target	Net Zero Cloud
Fee Schedule Definition	Health Cloud
Freight Hauling Emissions Factor	Net Zero Cloud
Freight Hauling Energy Use	Net Zero Cloud
Generated Waste	Net Zero Cloud
Ground Travel Emissions Factor	Net Zero Cloud
Ground Travel Energy Use	Net Zero Cloud

Object	Product Area
Holiday	Salesforce Field Services
Hotel Stay Emission Factor	Net Zero Cloud
Hotel Stay Energy Use	Net Zero Cloud
Identity Resolution	Marketing Cloud-Customer Data Platform
Inflation Rate	Net Zero Cloud
Media Channel	Media Cloud
Media Content Title	Media Cloud
Med Recon Recommendation	Health Cloud
Med Recon Stmt Recommendation	Health Cloud
Medication Dispense	Health Cloud
Medication Reconciliation	Health Cloud
Medication Statement Details	Health Cloud
Other Emissions Factor Set	Net Zero Cloud
Other Emissions Factor Set Item	Net Zero Cloud
Payment Request	Insurance Cloud
Payment Request Line	Insurance Cloud
Privacy Request	Platform Services
Procurement Emissions Factor Set	Net Zero Cloud
Procurement Emissions Factor Set Item	Net Zero Cloud
Program Rebate Type Product	Manufacturing Cloud
Rebate Member Aggregate Item	Manufacturing Cloud
Refrigerant Emissions Factor	Net Zero Cloud
Rental Car Emissions Factor	Net Zero Cloud
Rental Car Energy Use	Net Zero Cloud
Reported Consumption	Net Zero Cloud
Scope 3 Carbon Footprint	Net Zero Cloud
Scope 3 Emissions Source	Net Zero Cloud
Scope 3 Procurement Item	Net Zero Cloud
Scope 3 Procurement Summary	Net Zero Cloud
Service Point	Net Zero Cloud

Object	Product Area
Stationary Asset Carbon Footprint	Net Zero Cloud
Stationary Asset Carbon Footprint Item	Net Zero Cloud
Stationary Asset Energy Use	Net Zero Cloud
Stationary Asset Environmental Source	Net Zero Cloud
Supplier	Net Zero Cloud
Sustainability Scorecard	Net Zero Cloud
Vehicle Asset Carbon Footprint	Net Zero Cloud
Vehicle Asset Emissions Source	Net Zero Cloud
Vehicle Asset Energy Use	Net Zero Cloud
Waste Disposal Emissions Factor Set	Net Zero Cloud
Waste Disposal Emissions Factor Set Item	Net Zero Cloud
Waste Footprint	Net Zero Cloud
Waste Footprint Item	Net Zero Cloud

Salesforce Help: Searchable Fields by Object in Lightning Experience (Right-click to view in a new tab or window.)

Salesforce Data Pipelines

Use datasets between Data Pipelines and Tableau CRM, and manage recipe runs with improved event-based scheduling that waits until other runs complete.

IN THIS SECTION:

Bring Tableau CRM and Data Pipelines Data Together

Are you tired of recreating Tableau CRM recipes in Data Pipelines to generate the same dataset? When using both Tableau CRM and Data Pipelines products, you now choose which product's limits a recipe's run and dataset will use. You can use either products' datasets as inputs when building recipes to avoid recreating and updating recipes in both products. Also, you can oversee recipe and dataset product associations with updated recipe and dataset monitor pages.

Schedule Recipe Jobs After Other Jobs Complete

Control the priority and order of recipe jobs based on your business and data needs with improved event-based scheduling that waits until other jobs complete. Set your scheduled jobs to kick off after the needed data refreshes or only after a required job completes. Previously, you could set event-based schedules to run only after the related local connection synced.

Troubleshoot Recipe Jobs with Expanded Monitoring

Investigate and optimize your recipe jobs with the more detailed Jobs Monitoring page. Details like wait time, overall and per-step duration, and detailed error messages are available. You can see at a glance, for example, whether a recipe run was completed later than usual because of increased rows or wait time. You can also improve recipe run times by testing different transformation configurations and by monitoring each job's processing duration.

Other Enhancements to Data Pipelines

Learn about other important improvements to enrich your recipes in Data Pipelines.

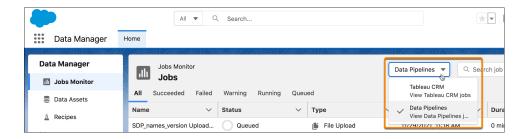
Bring Tableau CRM and Data Pipelines Data Together

Are you tired of recreating Tableau CRM recipes in Data Pipelines to generate the same dataset? When using both Tableau CRM and Data Pipelines products, you now choose which product's limits a recipe's run and dataset will use. You can use either products' datasets as inputs when building recipes to avoid recreating and updating recipes in both products. Also, you can oversee recipe and dataset product associations with updated recipe and dataset monitor pages.

Where: This change applies to Tableau CRM in Lightning Experience when using the new Data Manager (beta). Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

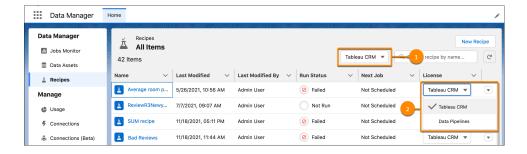
Who: Users with both a Tableau CRM and a Data Pipelines license. Data Pipelines isn't available to Government Cloud customers.

How: When saving a recipe for the first time, select its product, which determines which limits and queue are used and which users have access to the data. For example, a recipe associated with Data Pipelines uses your org's Data Pipelines allotted monthly job runtime, and its dataset isn't available to Tableau CRM users unless they also have a Data Pipelines license.



To use data from a Tableau CRM or Data Pipeline recipe in another recipe, add the dataset as an input node.

The new Data Manager, available as beta for Tableau CRM, helps you manage and track the product associated with recipes and datasets.



On the Recipes tab, sort the recipes by product (1), or change the association with the recipe's License dropdown (2).

On the Data Assets tab, view the data associated with each product using the product dropdown.



Salesforce Help: How Tableau CRM and Salesforce Data Pipelines Work Together (Right-click to view in a new tab or window.)

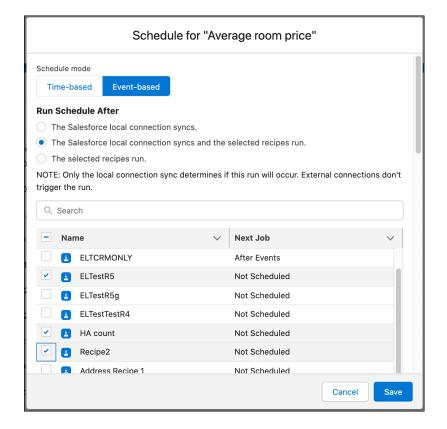
Schedule Recipe Jobs After Other Jobs Complete

Control the priority and order of recipe jobs based on your business and data needs with improved event-based scheduling that waits until other jobs complete. Set your scheduled jobs to kick off after the needed data refreshes or only after a required job completes. Previously, you could set event-based schedules to run only after the related local connection synced.

Where: This change applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: Data Pipelines isn't available to Government Cloud customers.

How: When you schedule a recipe, choose up to five recipes that complete before this job can begin.



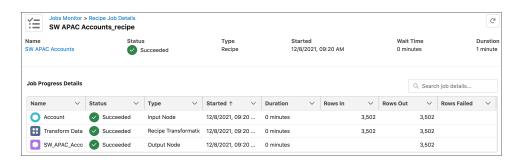
Salesforce Help: Run and Schedule Recipes (Right-click to view in a new tab or window.)

Troubleshoot Recipe Jobs with Expanded Monitoring

Investigate and optimize your recipe jobs with the more detailed Jobs Monitoring page. Details like wait time, overall and per-step duration, and detailed error messages are available. You can see at a glance, for example, whether a recipe run was completed later than usual because of increased rows or wait time. You can also improve recipe run times by testing different transformation configurations and by monitoring each job's processing duration.

Where: This change applies to Tableau CRM in Lightning Experience when using the new Data Manager (beta). Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To see detailed run information, click a recipe's name on the Jobs Monitor tab of the Data Manager.



SEE ALSO:

Salesforce Help: Monitor Sync and Recipes (Right-click to view in a new tab or window.)

Other Enhancements to Data Pipelines

Learn about other important improvements to enrich your recipes in Data Pipelines.

Where: This change applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

Pull Data from Hubspot (Beta)

You can now connect to and extract data from Hubspot into Data Pipelines for integration with other data. To learn more, see Sync Data from HubSpot (Beta) on page 111.

Push Data to Azure Data Lake (Beta)

You have another option to output from a Data Pipelines recipe to an external data source, Microsoft's Azure Data Lake. To learn more, see Output Your Tableau CRM Data to Azure Data Lake (Beta) on page 111.

Swap Dataset Column Values from Another Source

Use the Update node to replace a column's values if key pairs match. To learn more, see Update Dataset Column Values with Data from Another Source on page 113.

Join Unrelated Records (Beta)

You have a new option for the Join transformation. Use a cross join to connect unrelated records. To learn more, see Combine Unrelated Records with Cross Join (Beta) on page 115.

Define a Fiscal Year Specific to Data Prep Data

If you don't have an org-wide custom fiscal year set up, you can now use a custom fiscal year for Data Pipelines data. To learn more, see Configure Your Fiscal Year in Data Prep on page 116.

Fine-Tune a Dataset by Dropping Columns

Refine your datasets by choosing the columns that you want to keep and dropping the rest with Drop transformation. To learn more, see Choose the Columns That You Want to Keep on page 117.

View Sentiment as a Measure

You can now view the Detect Sentiment transform node result as a decimal number and use it in formulas. To learn more, see Get a Wider Spectrum of Sentiment with the Measure Output Type on page 117.

Evaluate Detect Sentiment Transformation Accuracy

It's easier to check the Detect Sentiment transformation's accuracy with the new sentiment score column. To learn more, see Gauge Accuracy with Sentiment Scores on page 118.

Aggregate Forecasts Automatically with More Grouping Options

The Time Series Forecast transformation now automatically aggregates measures and lets you choose additional groupings. To learn more, see Save Time with Improved Forecasting on page 119.

Create Large Recipes with Data Prep Improvements

The process of building recipes with hundreds of nodes is faster with zoom options, node cleanup, visibility of build progress, and error message linking. To learn more, see Build Big Recipes Faster on page 120.

Manage Transformations Better with Panel Changes

The panel for configuring transformations is improved with the options to resize the space, customize the API name, and hide multiple columns simultaneously. To learn more, see Set Up Transformations More Easily with Transform Panel Improvements on page 121.

Add and Update Direct Data Filters with a Separate Node

The data pulled into a recipe through Direct Data is now controlled with a separate filter node. To learn more, see Manage Direct Data Filters in a Separate Node on page 122.

Analytics

Customize data with clicks instead of code with the updated Revenue Operations dashboards. Reuse customizations more easily in your dashboards with Lightning Web Components. Get guidance when you search for data with Ask Data for Salesforce (beta).

IN THIS SECTION:

Reports and Dashboards

Easily choose the best report type for your new report. Check out recently used report types, see which fields and objects are included, and hide unused report types. For dashboards that track your business goals and performance, create dynamic gauge charts that stay current as your business grows. Keep your report fields up to date with multi-row, inline editing. Edit multiple fields on the report run page, and then save with a single click.

Tableau CRM

Push your data from Tableau CRM into Microsoft's Azure Data Lake when you use a Data Prep recipe. Try the new Customer Insights Pipeline Trending Waterfall Chart that shows the beginning and end values of the pipe as well as what's moved in and out. Create reusable and customized visualizations for dashboards with Lightning Web Components. Use Ask Data for Salesforce (beta) to guide you in answering your data questions.

Reports and Dashboards

Easily choose the best report type for your new report. Check out recently used report types, see which fields and objects are included, and hide unused report types. For dashboards that track your business goals and performance, create dynamic gauge charts that stay current as your business grows. Keep your report fields up to date with multi-row, inline editing. Edit multiple fields on the report run page, and then save with a single click.

IN THIS SECTION:

Easily Find the Right Report Type for New Reports (Beta)

Take the guesswork out of report type selection when creating a report. With the enhanced report type selector, quickly access recently used report types and view the fields and objects that are included. See at a glance which report types are standard or custom, and keep the number of available report types manageable by hiding ones that you don't need.

Edit Multiple Fields Inline on the Report Run Page (Beta)

Now you can update statuses and clean up data without rerunning your reports. Save time while staying up to date by editing multiple records inline on the report run page. Make inline changes in multiple rows or columns, and then save all the changes with a single click. It's a perfect way to update multiple statuses or clean up data without having to rerun your report.

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

Dashboard gauge charts are great for tracking 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.

Enjoy Enhanced Folder Sharing

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. All orgs are now updated to enhanced folder sharing. Legacy folder sharing is no longer available.

Easily Find the Right Report Type for New Reports (Beta)

Take the guesswork out of report type selection when creating a report. With the enhanced report type selector, quickly access recently used report types and view the fields and objects that are included. See at a glance which report types are standard or custom, and keep the number of available report types manageable by hiding ones that you don't need.

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

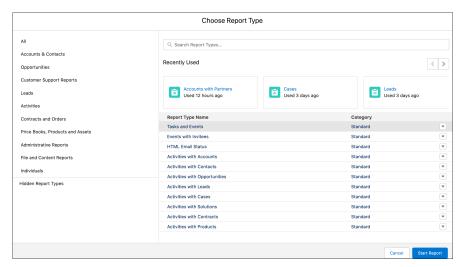


Note: Salesforce is no longer accepting requests for beta access to this feature. The feature becomes generally available in Summer '22.

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

Start a new report on the Reports tab. In the Choose Report Type windows, you can still select report type categories on the left and search for report types by name in the search bar.

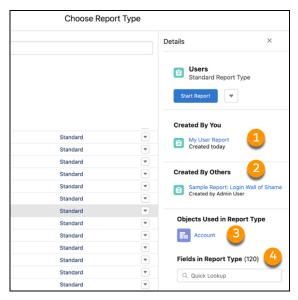
But now there's much more.



Say you want to create a report that's similar to one that you created last week, but you can't remember what report type you used. No problem! Scroll through the Recently Used list to find the type that you used and when you used it.



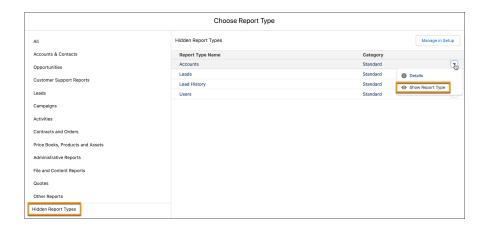
To display pertinent details about a report type, click it in the search results or in the Recently Used list.



The details panel lists all the reports created by you (1) or others in your org (2) that are based on the report type. It also lists the objects that the report type uses (3). Click a report link to open it, or click an object link to open the object record in Setup.

And what if you're not sure whether the report type includes particular fields that you need for your report? Scroll or do a quick lookup in the Fields area (4).

If you have the Manage Custom Report Types user permission, you can also hide report types from the details panel or report types list, just like you can in Salesforce Classic. Hidden report types disappear from the search results and all the category-specific lists, and you can't use them to create reports. They're listed under Hidden Report Types and available to show again if needed.



Edit Multiple Fields Inline on the Report Run Page (Beta)

Now you can update statuses and clean up data without rerunning your reports. Save time while staying up to date by editing multiple records inline on the report run page. Make inline changes in multiple rows or columns, and then save all the changes with a single click. It's a perfect way to update multiple statuses or clean up data without having to rerun your report.

Where: This change applies 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.

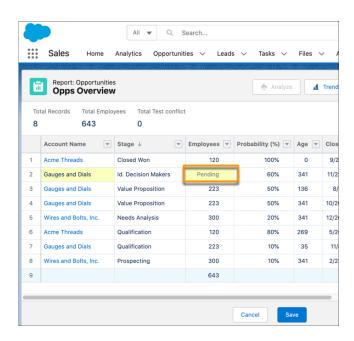
Now open the report. You can edit any field that shows a pencil icon when you hover. When you apply an edit, the background color changes to indicate that a new value is stored. You can change additional fields in the same row or a different row.



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



If you edit a field that has related fields in the same record, the other fields are marked as Pending. When the changes are saved, the related fields are updated with the new value. This example shows an opportunity report with an edit to the account name. Because the number of employees for an account is related to the account name, the Employees value is marked as Pending.

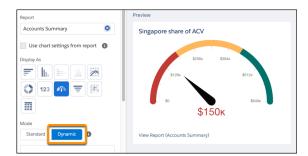


Automatically Tune Your Dashboards to Your Business Goals with Dynamic Gauge Charts (Generally Available)

Dashboard gauge charts are great for tracking 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: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions

How: When adding a gauge chart in the dashboard builder, select **Standard** or **Dynamic** mode. In Standard mode, you use fixed values to create the gauge chart. In Dynamic mode, you have 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. Because the chart is dynamic, improvements in the Singapore team's performance are automatically reflected in the chart.



Enjoy Enhanced Folder Sharing

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. All orgs are now updated to enhanced folder sharing. Legacy folder sharing is no longer available.

Where: This change applies to Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Enhanced Folder Sharing simplifies folder creation and changes how you interact with reports and dashboards in shared folders. Benefits include:

- Consistent sharing concepts across users, roles, and groups
- Sharing reports and dashboards with individual users
- Three access levels for each folder: view, edit, manage
- A symmetric set of user permissions for reports and dashboards

Tableau CRM

Push your data from Tableau CRM into Microsoft's Azure Data Lake when you use a Data Prep recipe. Try the new Customer Insights Pipeline Trending Waterfall Chart that shows the beginning and end values of the pipe as well as what's moved in and out. Create reusable and customized visualizations for dashboards with Lightning Web Components. Use Ask Data for Salesforce (beta) to guide you in answering your data questions.

IN THIS SECTION:

Analytics Data Integration

Push data from Data Prep recipes to Azure Data Lake (beta). Replace a column's values when key pairs match. Define a fiscal year specific to Tableau CRM data.

Analytics Prebuilt Apps

Try the new Customer Insights Pipeline Trending Waterfall Chart that shows the beginning and end values of the pipe as well as what's moved in and out. The new chart makes it easy to understand how close you are to meeting your quotas at-a-glance. Use the new Tableau CRM for Energy and Utilities App to make informed decisions about your Energy and Utilities sales.

Analytics App Building

Use the power of Lightning Web Components to create custom charts and widgets for dashboards. Create a customized and stylized view of query data with repeater widgets. Adjust column width by dragging the column's right border in explorer and dashboard tables.

Einstein Discovery

Use multiclass models to predict outcomes with 3 to 10 possible values. Segment your data with free text clustering. Embed multiclass predictions in Salesforce flows. Fine-tune prediction accuracy with trending data.

Tableau CRM for Everyone

With intelligent, self-service analytics, Ask Data for Salesforce (beta) guides you in answering your data questions. Display collections of curated dashboards and lenses on Lightning pages with the new Tableau CRM Collection component. Manage how you want your collection dashboards to be seen, and enable consistent views for shared users.

Analytics Mobile Apps

Explore lenses and datasets in the Analytics tab in the Salesforce mobile app. Plus, sort tables in dashboards faster by tapping column headers in Tableau CRM for iOS, and save your data explorations as a lens in Tableau CRM for Android.

Analytics Data Integration

Push data from Data Prep recipes to Azure Data Lake (beta). Replace a column's values when key pairs match. Define a fiscal year specific to Tableau CRM data.

IN THIS SECTION:

Check Your Data at a Glance in Data Manager (Beta)

Data Manager has a brand new look. The streamlined Connections view in Data Manager now lets you see connections in a column list. Get details when you click on a connection. In the new Usage view, we've improved visibility into your usage and limits.

Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Generally Available)

Want to break free from GMT and view time-sensitive dashboard data in another time zone? We've got you covered. Now you can view dashboard data in the time zone that matters most to your business. In case you didn't know, dashboard data is converted to the GMT time zone. That means when your California-based support team creates a case late on Wednesday (in California time), the creation date could suddenly change to early Thursday in their customer support dashboard. With Single Custom Time Zone, you can ensure that time-sensitive data is more precise and relevant to your global audience. This feature is now generally available.

Adopt the New and Improved Tableau CRM Connectors

It's time to make the switch. The remote connectors that you use to sync data to Tableau CRM have been improved with new versions. Connections with the same or better options and performance are automatically switched to the new versions on a rolling basis during the Summer '22 release. For connectors that require the connection to be manually recreated and associated recipes and dataflows updated, migrate and test before the deadline to avoid stale datasets. Customers new to Tableau CRM after August 1, 2021, and all government cloud customers, only use the new connector versions.

Sync Data from HubSpot (Beta)

Pull your marketing, sales, and customer service data from HubSpot into Data Manager without code by using the HubSpot connector for Tableau CRM. For example, analyze a marketing campaign by merging Hubspot marketing data with Salesforce purchase data in a recipe, and then build a dashboard to see if increased marketing results in more sales.

Output Your Tableau CRM Data to Azure Data Lake (Beta)

Push your data from Tableau CRM into Microsoft's Azure Data Lake when you use a Data Prep recipe. A recipe combines and updates data from multiple sources, intelligently fills in missing values, and transforms data into datasets tailored to your business needs. With the Azure Data Lake output connector, datasets are pushed and written as one or more .csv files for you to improve your overall business processes with better data. For example, you can output processed and transformed customer service data to help agents improve customer satisfaction.

Sync Data Faster from Objects That Cascade Hard Deletes

Speed up data extraction from objects that cascade hard deletes by using incremental data sync. Incremental data sync pulls only new, updated, and deleted records. Previously, you pulled all records every sync from objects that hard deleted their child records when the parent record is deleted, like ContentVersion and CampaignMember. To minimize data drift, the inclusion or exclusion of records from operations while sync is running, we recommend that you use Periodic Full Sync.

Update Dataset Column Values with Data from Another Source

With the Update node, swap column values with data from another data source when key pairs match. For example, to update selected account names after a series of recent acquisitions and mergers, replace the name from an uploaded spreadsheet based on matching account IDs. Previously, without key pair matching, you'd include every account's name in the spreadsheet and clean up with a Join node.

Combine Unrelated Records with Cross Join (Beta)

The latest addition to Data Prep's join types is the cross join. A cross join pairs every row from one dataset with every row of another dataset (known as the Cartesian Product). For example, cross join meals with drinks to find all the possible menu combinations, or stores and products for stock tracking.

Configure Your Fiscal Year in Data Prep

Analyze your Tableau CRM data by a fiscal year without impacting your entire org or taking manual steps. Define your fiscal year in Data Prep and automatically apply it to your Data Prep data. Previously, the fiscal month offset attribute had to be modified in each dataset's JSON. This feature is only available for orgs that don't have an org-wide custom fiscal year defined in the company profile.

Choose the Columns That You Want to Keep

Refine your datasets by choosing the columns that you want to keep and dropping the rest with Drop transformation. Previously, you could only choose which columns you wanted to remove. For example, say you've got a dataset with 100 columns and only 10 are needed. Now it's easy to select only the 10 columns you want to keep, rather than selecting the 90 columns you want to remove.

Get a Wider Spectrum of Sentiment with the Measure Output Type

View sentiment as a measure and to get more depth. You can now choose to get a detected sentiment as decimal value on a 5-point scale and use it in formulas. For example, apply sentiment detection to your customer's survey comments and then calculate an average sentiment by account, product, or location.

Gauge Accuracy with Sentiment Scores

Data Prep's Detect Sentiment is a smart transform that just got even smarter. Einstein now self-assesses its confidence in the accuracy of the sentiment and reports back to you by adding new sentiment score columns. The scores help you understand the accuracy of the sentiment output and can be used in formulas. For example, trigger a support case when an online review has negative sentiment with a strong sentiment score.

Save Time with Improved Forecasting

Data Prep's time series forecasting now does the work for you—no more manually aggregating measures for forecasting. You can also choose additional groupings, such as forecasting for each account, all in one node. Previously, you had to manually aggregate and group in separate nodes.

Embed Multiclass Predictions in Your Dataset During Data Prep

The Discovery Predict transformation for Data Prep recipes now supports Einstein Discovery multiclass models, which predict the most likely outcome among up to 10 possible outcomes. For example, if you offer five support contract levels, use a multiclass model to predict which support contract level a new customer will likely purchase. When you run a recipe with a Discovery Predict transformation, Einstein calculates and saves predicted outcomes to the prediction output field on a row-by-row basis.

Build Big Recipes Faster

Creating large recipes is easier with zoom options, node cleanup, visibility of build progress, and error message linking. For example, you can change your perspective of the data prep graph by zooming out to see all your nodes or zoom in for greater detail. Tidy up your graph using node cleanup to arrange nodes by type, organize the flow of data from left to right, and straighten up relationships. You can monitor whether a node's preview is ready to view with a build progress wheel. We also help you troubleshoot large recipes by linking to the specific node when we detect an error in the recipe.

Set Up Transformations More Easily with Transform Panel Improvements

Give yourself room to configure your transformations by resizing the transform panel. For example, expand the columns pane to view long column names, or shrink it to have more space for a long formula. Customize the API name of derived columns faster from the transform configuration without editing its attributes. Save time hiding or dropping multiple columns with the option to select more than one at a time.

Manage Direct Data Filters in a Separate Node

Direct data filters are now a separate node, making it easier to see whether a direct data input is filtered. Direct data filters speed up recipe runs by reducing the number of records pulled into the recipe. Previously, filters were part of the direct data input node.

Build with Data Prep for Government Cloud Plus

Government Cloud Plus users can now use secure and speedy Data Prep recipes to build, transform, and output datasets for analysis. Data Prep expands on an intuitive, visual interface where you can point-and-click your way to build recipes. Use the graphical view of a recipe to see at a glance where data comes from and how it flows through the recipe to the target. To validate the recipe as you build, you can preview how raw data is transformed at every step. Your recipes are automatically available and eligible for the Data Prep improvements, including smart transformations and troubleshooting.

Check Your Data at a Glance in Data Manager (Beta)

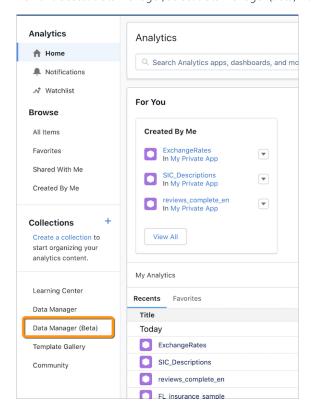
Data Manager has a brand new look. The streamlined Connections view in Data Manager now lets you see connections in a column list. Get details when you click on a connection. In the new Usage view, we've improved visibility into your usage and limits.

Where: Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

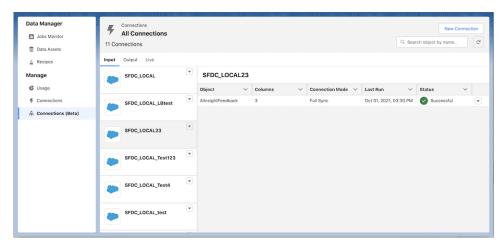


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

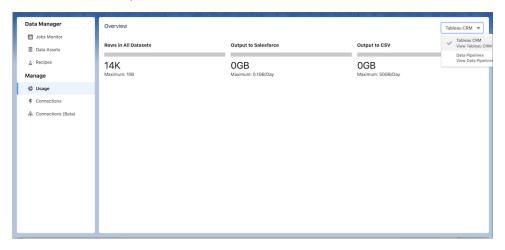
How: To access Data Manager, select Data Manager (Beta) from the Analytics Studio home page.



A connection's details appear as a table in the right pane.



To check if a product is nearing its limit, see the Usage pane. If you have licenses for Tableau CRM and Data Pipelines, click the dropdown to switch between each product's information.



SEE ALSO:

Bring Tableau CRM and Data Pipelines Data Together

Add Accuracy to Your Insights with Date and Time Data in Your Local Time Zone (Generally Available)

Want to break free from GMT and view time-sensitive dashboard data in another time zone? We've got you covered. Now you can view dashboard data in the time zone that matters most to your business. In case you didn't know, dashboard data is converted to the GMT time zone. That means when your California-based support team creates a case late on Wednesday (in California time), the creation date could suddenly change to early Thursday in their customer support dashboard. With Single Custom Time Zone, you can ensure that time-sensitive data is more precise and relevant to your global audience. This feature is now generally available.

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

How: Turn on Single Custom Time Zone in Analytics Setup and select which time zone to use.

Keep these considerations in mind when using Single Custom Time Zone.

- A time zone is defined at the org level.
- All datasets must be refreshed after enabling Single Custom Time Zone and specifying your default org time zone.

- Existing dashboards remain in the GMT time zone.
- After enabling Single Custom Time Zone, new dashboards can use non-GMT time zones.

SEE ALSO:

Salesforce Help: Handle Custom Time Zone Values (Right-click to view in a new tab or window.)

Adopt the New and Improved Tableau CRM Connectors

It's time to make the switch. The remote connectors that you use to sync data to Tableau CRM have been improved with new versions. Connections with the same or better options and performance are automatically switched to the new versions on a rolling basis during the Summer '22 release. For connectors that require the connection to be manually recreated and associated recipes and dataflows updated, migrate and test before the deadline to avoid stale datasets. Customers new to Tableau CRM after August 1, 2021, and all government cloud customers, only use the new connector versions.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.



Note: If you received the email **ATTENTION: Tableau CRM connectors are being replaced**, check the Summer '22 Preview version of this release note after April 25 to see how your connectors are impacted.

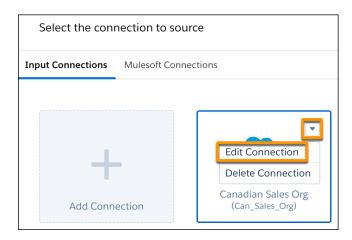
How: Connections created with these connectors continue to use the legacy version until you manually upgrade using the connector's legacy toggle, or we switch them during the Summer '22 release.

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 version shows Boolean values as t or f instead of 0 or 1.
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. To avoid unintended objects, you can only add objects to the connection that have a schema_sample.csv file.
AWS RDS MySQL Connector*	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS Oracle Connector*	No changes.
AWS RDS PostgreSQL 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. To use BigQuery Storage API, set the new version's Use Storage API property to true. The new version doesn't use the staging environment.
Google BigQuery Standard SQL Connector	BigQuery Storage Read API is now supported, which can increase throughput. To use BigQuery Storage API, set the new version's Use Storage API property to true. The new version doesn't use the staging environment.

Connector	Notes
Google Cloud Spanner Connector*	No changes.
Heroku Postgres Connector*	No changes.
Hubspot Connector*	No changes.
Microsoft Azure SQL Database Connector*	No changes.
Microsoft Azure Synapse Analytics Connector*	The Microsoft Azure SQL Data Warehouse connector is now called Microsoft Synapse Analytics Connector to reflect Microsoft's renaming. The connector works the same as it did before and continues to access Azure Data Warehouse SQL pools.
NetSuite Connector	The new version names objects differently than the legacy version. After upgrading, update your recipes and dataflows with the new object names.
Salesforce External Connector*	No changes.
Salesforce Marketing Cloud OAuth 2.0 Connector	 The new version makes more Marketing Cloud data accessible through expanded Data Extension support. The new version names objects differently than the legacy version. After upgrading, update your recipes and dataflows with the new object names. Data extensions aren't impacted. The new version names some fields differently than the legacy version. Data extensions aren't impacted. Top-level and child business unit MID information is now available in the object names using the format ChildObjectName_childMID. The current business unit's Data Extensions are shown with and without their MID suffix, with identical data for both. To view this information, enable the connector property Display Child Data Extensions.
Snowflake Connector*	The new version supports key pair authentication.
Zendesk Connector*	No changes.

^{*}These connectors default to the new version, without the option to revert using the **Use legacy connector** toggle, when you delete all existing connections of its type or deselect their Legacy toggle. For example, if you delete your only AWS RDS MySQL connection that's using the legacy connector, then add an AWS RDS MySQL connection, it uses the new connector version and the **Use legacy connector** toggle isn't available. In testing, the new connector versions are approximately 50% more efficient than the legacy versions and more stable, improving your ability to pull data into Tableau CRM. To use the **Use legacy connector** in this situation, contact Salesforce Customer Support.

To manually upgrade, on the Data Manager Connect tab, select **Connect to Data**. 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 one of these connectors, we recommend that you use the new connector version to avoid another upgrade in the future. If the tests aren't successful, turn on **Use legacy connector**.

Your connections created with the following connectors continue to use the legacy version until you manually migrate to the new version. You can't upgrade them by deselecting **Use legacy connector**.

Connector	Notes
Google Analytics Core Reporting v4 Connector	The new version supports custom objects, uses core reporting API v4.0, and provides additional Google Analytics options.
Marketo Connector	The Marketo Connector and Marketo Legacy Connector reflect the new or legacy version. The new version supports filtering on select objects.
Oracle Eloqua Connector	The new version uses different field names, includes more objects than the legacy version, and doesn't support the Activity object.
SAP HANA Connector	The SAP HANA Cloud Connector and SAP HANA Connector reflect the new or legacy version. The new version supports filtering, uses different connection properties, and is JDBC-based.

To migrate to the new version, create a connection that mirrors the settings of your legacy connection and includes the new required properties. Then update your recipes and dataflows to use the external objects from the new connection. Keep the legacy version for troubleshooting. When you create a connection from this group, it's always the new version.

Your existing connections created with the following connectors have been automatically switched the new version. Connections created with these connectors can only use the new version.

Connector	Notes
AWS RDS Aurora MySQL Connector	The new version supports unsigned INT and unsigned BIGINT fields.

Connector	Notes
AWS RDS Aurora PostgreSQL Connector	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS MariaDB Connector	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS SQL Server Connector	The new version supports unsigned INT and unsigned BIGINT fields.

If you have more questions, you can join the conversation in the Tableau CRM Connectors Trailblazer Group.

SEE ALSO:

Salesforce Help: New Connector Version Upgrades and Considerations (Right-click to view in a new tab or window.)

Sync Data from HubSpot (Beta)

Pull your marketing, sales, and customer service data from HubSpot into Data Manager without code by using the HubSpot connector for Tableau CRM. For example, analyze a marketing campaign by merging Hubspot marketing data with Salesforce purchase data in a recipe, and then build a dashboard to see if increased marketing results in more sales.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available 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.

How: On the Data Manager Connect tab, add a connection, and select *Hubspot Connector* (*beta*). Enter the connector properties, and then save and test. When the connection is ready to go, select which objects to pull, and set a data sync schedule to keep the data fresh.

SEE ALSO:

Salesforce Help: Hubspot Connection (Beta) (Right-click to view in a new tab or window.)

Output Your Tableau CRM Data to Azure Data Lake (Beta)

Push your data from Tableau CRM into Microsoft's Azure Data Lake when you use a Data Prep recipe. A recipe combines and updates data from multiple sources, intelligently fills in missing values, and transforms data into datasets tailored to your business needs. With the Azure Data Lake output connector, datasets are pushed and written as one or more .csv files for you to improve your overall business processes with better data. For example, you can output processed and transformed customer service data to help agents 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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

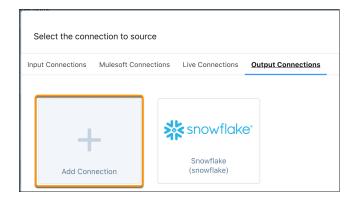


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

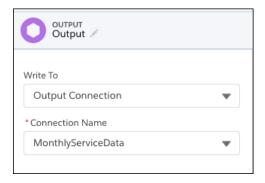
How: Enable the Azure Data Lake output connector from the Analytics page in Setup. On the Data Manager Connect tab, create the connection.



On the Output Connections tab, click **Add Connection**. Select the Azure Data Lake (Beta) connection, enter the connector properties, and save.



Build out your Data Prep recipe, and add an Output node. Select **Output Connection**, and choose the connection. In this example, the dataset is saved to the MonthlyServiceData Azure Data Lake connection.



When the recipe runs, Tableau CRM writes data to the specified object in the folder path within the directory.

SEE ALSO:

Salesforce Help: Azure Data Lake Output Connection (Beta) (Right-click to view in a new tab or window.)

Sync Data Faster from Objects That Cascade Hard Deletes

Speed up data extraction from objects that cascade hard deletes by using incremental data sync. Incremental data sync pulls only new, updated, and deleted records. Previously, you pulled all records every sync from objects that hard deleted their child records when the parent record is deleted, like ContentVersion and CampaignMember. To minimize data drift, the inclusion or exclusion of records from operations while sync is running, we recommend that you use Periodic Full Sync.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: On the Data Manager Connect tab, edit a local object's connection mode. Select Incremental Sync to pull only new, updated, and deleted records to match the changes in the Salesforce object since the previous sync. Best practice is to use select periodic full sync. Periodic full sync runs an incremental sync on each scheduled sync and runs a full sync on the first sync that happens after Friday 11 PM in your org's time zone.

SEE ALSO:

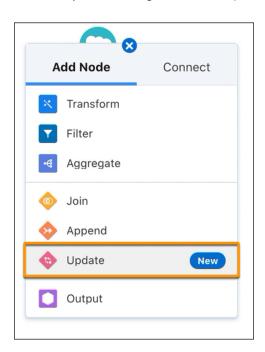
Salesforce Help: Verify the Incremental Sync Settings for Salesforce Data (Right-click to view in a new tab or window.)

Update Dataset Column Values with Data from Another Source

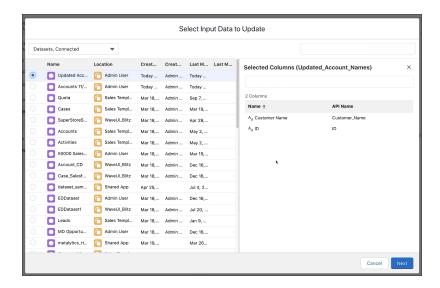
With the Update node, swap column values with data from another data source when key pairs match. For example, to update selected account names after a series of recent acquisitions and mergers, replace the name from an uploaded spreadsheet based on matching account IDs. Previously, without key pair matching, you'd include every account's name in the spreadsheet and clean up with a Join node.

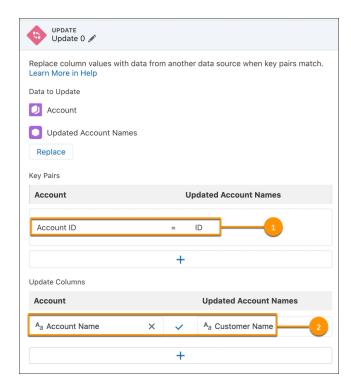
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data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

How: After you add the original data as an input node, add an Update node.



Choose the dataset containing the update data. This example replaces the Account Name of certain rows based on whether their ID is included in a previously uploaded CSV file.





Choose which key pair values must match between the original and update data (1) and which columns to update (2). A column is updated if all key pairs match. If the account ID is included in the uploaded spreadsheet, its name is updated. If the ID isn't included, the original name is left in place.

SEE ALSO:

Salesforce Help: Update Node: Swap Column Values (Right-click to view in a new tab or window.)

Combine Unrelated Records with Cross Join (Beta)

The latest addition to Data Prep's join types is the cross join. A cross join pairs every row from one dataset with every row of another dataset (known as the Cartesian Product). For example, cross join meals with drinks to find all the possible menu combinations, or stores and products for stock tracking.

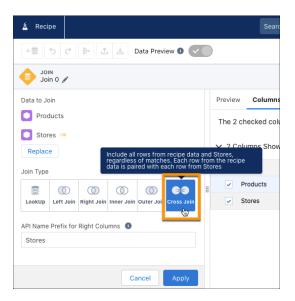
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data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



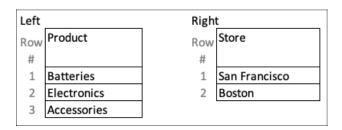
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

When: This feature is added on a rolling basis during the Spring '22 release.

How: In your Data Prep recipe Join node, select Cross Join.



Say your company sells products in San Francisco and Boston. To assist with stock tracking, you can use a cross join to combine the product and store datasets to find all the possible pairs of product and store.



The cross join produces a dataset with a row for each product in both San Francisco and Boston stores.





Note: Because a cross join creates a significantly larger target dataset than the source datasets, it has some limitations. For example, you can perform only one cross join per recipe and generate a maximum of 10 million rows in the target dataset. To learn more about the limitations, see Cross Join.

SEE ALSO:

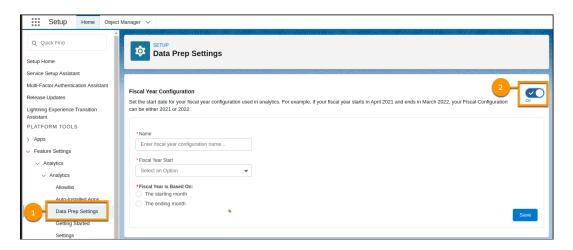
Salesforce Help: Cross Join (Beta) (Right-click to view in a new tab or window.)

Configure Your Fiscal Year in Data Prep

Analyze your Tableau CRM data by a fiscal year without impacting your entire org or taking manual steps. Define your fiscal year in Data Prep and automatically apply it to your Data Prep data. Previously, the fiscal month offset attribute had to be modified in each dataset's JSON. This feature is only available for orgs that don't have an org-wide custom fiscal year defined in the company profile.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: From Setup, in the Quick Find box, enter *Analytics*, then select **Data Prep Settings** (1). Enable Fiscal Year Configuration by clicking the toggle **On** (2).



SEE ALSO:

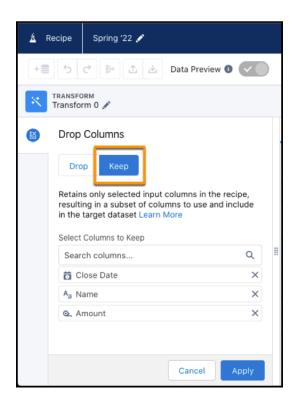
Salesforce Help: Data Prep's Fiscal Year Configuration (Right-click to view in a new tab or window.)
Salesforce Help: Date Formats and Fiscal Dates for Source Data (Right-click to view in a new tab or window.)

Choose the Columns That You Want to Keep

Refine your datasets by choosing the columns that you want to keep and dropping the rest with Drop transformation. Previously, you could only choose which columns you wanted to remove. For example, say you've got a dataset with 100 columns and only 10 are needed. Now it's easy to select only the 10 columns you want to keep, rather than selecting the 90 columns you want to remove.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To choose which columns that you want to keep and drop the rest, click **Keep**.



SEE ALSO:

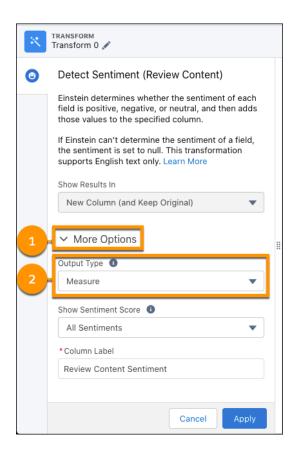
Salesforce Help: Drop Columns Transformation: Drop Columns from the Recipe (Right-click to view in a new tab or window.)

Get a Wider Spectrum of Sentiment with the Measure Output Type

View sentiment as a measure and to get more depth. You can now choose to get a detected sentiment as decimal value on a 5-point scale and use it in formulas. For example, apply sentiment detection to your customer's survey comments and then calculate an average sentiment by account, product, or location.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To detect sentiment as a measure, select **More Options** in your Data Prep recipe Detect Sentiment transform node (1). For Output Type, select **Measure** (2).



SEE ALSO:

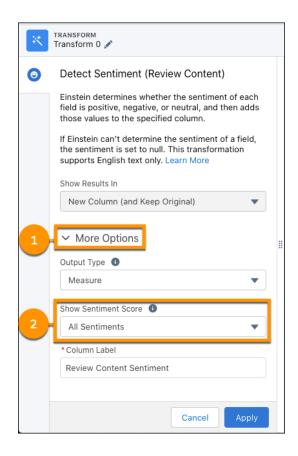
Salesforce Help: Detect Sentiment Transformation: Determine the Sentiment of Text (Right-click to view in a new tab or window.)

Gauge Accuracy with Sentiment Scores

Data Prep's Detect Sentiment is a smart transform that just got even smarter. Einstein now self-assesses its confidence in the accuracy of the sentiment and reports back to you by adding new sentiment score columns. The scores help you understand the accuracy of the sentiment output and can be used in formulas. For example, trigger a support case when an online review has negative sentiment with a strong sentiment score.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In your Data Prep recipe Detect Sentiment transform node, select **More Options** (1). For Show Sentiment Score, select **All Sentiments** (2).



SEE ALSO:

Salesforce Help: Detect Sentiment Transformation: Determine the Sentiment of Text (Right-click to view in a new tab or window.)

Save Time with Improved Forecasting

Data Prep's time series forecasting now does the work for you—no more manually aggregating measures for forecasting. You can also choose additional groupings, such as forecasting for each account, all in one node. Previously, you had to manually aggregate and group in separate nodes.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To use the improved time series forecasting, in the Data Prep editor, select **Time Series Forecast** in a transform node.

SEE ALSO:

Salesforce Help: Time Series Forecasting Transformation: Forecast Measures (Right-click to view in a new tab or window.)

Embed Multiclass Predictions in Your Dataset During Data Prep

The Discovery Predict transformation for Data Prep recipes now supports Einstein Discovery multiclass models, which predict the most likely outcome among up to 10 possible outcomes. For example, if you offer five support contract levels, use a multiclass model to predict which support contract level a new customer will likely purchase. When you run a recipe with a Discovery Predict transformation, Einstein calculates and saves predicted outcomes to the prediction output field on a row-by-row basis.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In your Data Prep recipe Einstein Predict node, select the prediction definition associated with the multiclass model that you want to use. Specify the prediction output field name and label, and then save.

SEE ALSO:

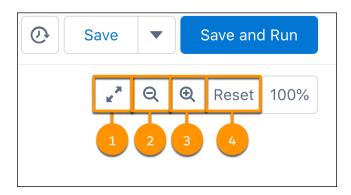
Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)

Build Big Recipes Faster

Creating large recipes is easier with zoom options, node cleanup, visibility of build progress, and error message linking. For example, you can change your perspective of the data prep graph by zooming out to see all your nodes or zoom in for greater detail. Tidy up your graph using node cleanup to arrange nodes by type, organize the flow of data from left to right, and straighten up relationships. You can monitor whether a node's preview is ready to view with a build progress wheel. We also help you troubleshoot large recipes by linking to the specific node when we detect an error in the recipe.

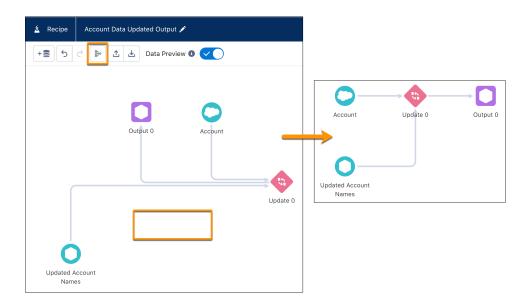
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data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

How: To change your graph zoom, open the zoom controls by clicking the current zoom %.



Auto-zoom to fit the graph to your screen (1), zoom out to see more of the graph (2), zoom in to see more details (3), or return the graph to 100% view (4).

To introduce structure to a disordered graph, click **Cleanup**. Input nodes are moved to the left and output to the right, with intermediate steps placed in between.



When the data preview for a node doesn't complete immediately, view the preview build status at a glance with the progress wheel. Mouse over the wheel to see the percent built.



SEE ALSO:

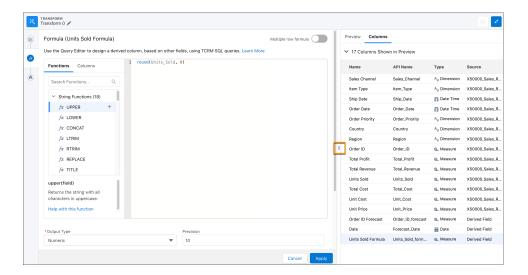
Salesforce Help: Best Practices When Building Recipes (Right-click to view in a new tab or window.)

Set Up Transformations More Easily with Transform Panel Improvements

Give yourself room to configure your transformations by resizing the transform panel. For example, expand the columns pane to view long column names, or shrink it to have more space for a long formula. Customize the API name of derived columns faster from the transform configuration without editing its attributes. Save time hiding or dropping multiple columns with the option to select more than one at a time.

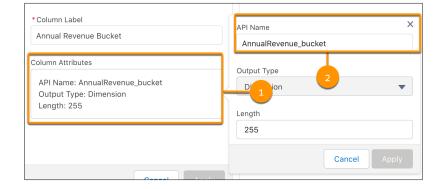
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How: Drag the panel slider to change its width. Give more space for configuration by widening the panel, or see more preview and column details by narrowing the panel.



Assign the API name of a column derived from a transformation on the transformation's configuration panel.





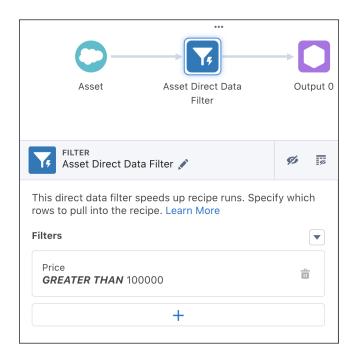
For some transformations, view the Column Attributes (1) to update the API name (2).

Manage Direct Data Filters in a Separate Node

Direct data filters are now a separate node, making it easier to see whether a direct data input is filtered. Direct data filters speed up recipe runs by reducing the number of records pulled into the recipe. Previously, filters were part of the direct data input node.

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. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Add a filter node after a direct data input node. The filter's graph icon has a lightning bolt to denote that it's a direct data filter.



SEE ALSO:

Salesforce Help: Pull Data Directly into Recipes (Right-click to view in a new tab or window.)

Build with Data Prep for Government Cloud Plus

Government Cloud Plus users can now use secure and speedy Data Prep recipes to build, transform, and output datasets for analysis. Data Prep expands on an intuitive, visual interface where you can point-and-click your way to build recipes. Use the graphical view of a recipe to see at a glance where data comes from and how it flows through the recipe to the target. To validate the recipe as you build, you can preview how raw data is transformed at every step. Your recipes are automatically available and eligible for the Data Prep improvements, including smart transformations and troubleshooting.

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: Data Prep is available to Government Cloud Plus customers.

How: Open or create a recipe to use Data Prep.

SEE ALSO:

Salesforce Help: Create a Recipe with Data Prep (Right-click to view in a new tab or window.)

Analytics Prebuilt Apps

Try the new Customer Insights Pipeline Trending Waterfall Chart that shows the beginning and end values of the pipe as well as what's moved in and out. The new chart makes it easy to understand how close you are to meeting your quotas at-a-glance. Use the new Tableau CRM for Energy and Utilities App to make informed decisions about your Energy and Utilities sales.

IN THIS SECTION:

Understand Your Pipeline with the New Customer Insights Pipeline Trending Waterfall Chart

Whether your pipeline is trending up or down, now you can see details about the deals and adjust your planning to meet your quotas. The new Customer Insights Pipeline Trending Waterfall Chart shows the beginning and end values of the pipe as well as what's moved in and out. And you can see where each opportunity falls in the pipeline, including new, closed won, and closed lost.

Shine a Light on Your Energy and Utility Sales Processes

With the new Tableau CRM for Energy and Utilities App, it's easy to know which opportunities are most likely to generate a sale, track how many quotes you've created, and know whether customers have responded to them. A comprehensive dashboard provides details about opportunities, quotes, and sales.

Create Meaningful and Elegant Apps with the Updated Analytics Design App

The updated Analytics Design App (Analytics Design Toolkit) includes dashboard components and layouts to make it simple to create intuitive and elegant apps. Dashboard components include KPI panels and use case widgets. The panels and widgets support activities like benchmarking, performance trending, segmenting, and monitoring activities over time, such as revenue or performance. Additionally, layouts allow you to embed panels in key pages, making it easy to access critical information when you need it. Layouts support master-detail, progressive discovery, and standalone and embedded layouts.

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How: The new Pipeline Trending Waterfall chart is on the Customer Insights Opportunity Gallery page. To use it, go to Tableau CRM Analytics Studio, click **Create**, and select **App**. Find and select **Customer Insights**. Then follow the instructions in the wizard to create your app. If you have an existing Customer Insights app, upgrade it to view the new functionality. To upgrade your app, from the home page click the **New version available**, and then follow the wizard's instructions. Upgrading an app removes any customizations.

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With the new Tableau CRM for Energy and Utilities App, it's easy to know which opportunities are most likely to generate a sale, track how many quotes you've created, and know whether customers have responded to them. A comprehensive dashboard provides details about opportunities, quotes, and sales.

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 Energy and Utilities App is only for Energy and Utility Cloud users. To create a Tableau CRM for Energy and Utilities App, you must also have the Tableau CRM for Energy and Utilities App license.

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

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The updated Analytics Design App (Analytics Design Toolkit) includes dashboard components and layouts to make it simple to create intuitive and elegant apps. Dashboard components include KPI panels and use case widgets. The panels and widgets support activities like benchmarking, performance trending, segmenting, and monitoring activities over time, such as revenue or performance. Additionally, layouts allow you to embed panels in key pages, making it easy to access critical information when you need it. Layouts support master-detail, progressive discovery, and standalone and embedded layouts.

How: The updated Analytics Design Kit supercharges your ability to create intuitive and meaningful apps. To use it, go to Tableau CRM Analytics Studio, click **Create**, and select **App**. Find and select **Design Analytics Toolkit**. Then follow the instructions in the wizard to create your app. If you have an existing Analytics Design app, upgrade it to view the new functionality. To upgrade your app, from the home page click **New version available**, and then follow the wizard's instructions. Upgrading an app removes all customizations.

Analytics App Building

Use the power of Lightning Web Components to create custom charts and widgets for dashboards. Create a customized and stylized view of guery data with repeater widgets. Adjust column width by dragging the column's right border in explorer and dashboard tables.

IN THIS SECTION:

Include Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Generally Available)

Build richer and more customized dashboards with the power of Lightning Web Components. With Lightning Web Components, you can create customized reusable extensions for use anywhere in Lightning Experience. Create 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. This feature is now generally available to all Tableau CRM users.

Turn Detailed Data into Eye-Catching Insights with Repeater Widgets (Generally Available)

Repeater widgets transform tabular data by showing select fields from a query in a scrollable list in your dashboard. Best of all, repeater widgets are based on the number of data rows in a query. So you create just one customized grouping of text, numbers, charts, and images, and you're done. Now your dashboard users can scroll through a customized and stylized view of query data. If you've been using repeater widgets, you can now add images and charts in addition to text and numbers.

Unlock Insights on Salesforce CDP Data (Generally Available)

With Tableau CRM Direct Data for Salesforce CDP, view actionable insights on CDP data in embedded dashboards for any Salesforce record. Get started with Tableau CRM Direct Data for Salesforce CDP without moving your data, prepping it, or creating live datasets. This feature, now generally available, includes a streamlined setup since the last release. You can now explore CDP objects in Tableau CRM dashboards without creating a live connection from Data Manager's Connect tab or a live dataset for CDP data.

Change Record Ownership in Tableau CRM

Change ownership in your data without leaving your Tableau CRM dashboard. Access the Change Owner action for objects like Account and Opportunity directly from the custom actions menu. Transfer account ownership easily when sales teams are updated.

Resize Table Columns and Wrap Text to Fit Content

Say goodbye to limited column resizing options in explorer and dashboard tables. You can now adjust a column width by dragging its right border. To make scanning table content even easier, take advantage of text wrapping for column headers and cells. The text wrapping option for cells replaces the Number of Lines per Row menu in the table properties panel.

Add Relative and Dynamic URLs in Link Widgets

The link widget now supports relative URL destinations that start with a slash and dynamic URLs created via bindings. Use relative links to connect other pages, like a list of recently viewed opportunities, inside the Salesforce experience. Create dynamic links based on query results and user selections. When a user selects an account record, the binding for that URL value now links to that account's external home page.

Access Tableau CRM Templated App Logs Anytime in Analytics Studio

See which assets were created for your templated app or check why app creation failed. Find valuable information for Tableau CRM templated apps on the Details page in Tableau CRM Analytics Studio. Previously, this information was available only by email to the user who created the app.

Improved Experience When Navigating Between Tableau CRM Dashboards

Tableau CRM dashboard links to other dashboards now handle state cleanly, resetting the filters and selections when navigating to an open dashboard tab instead of adding to the existing state. If the destination dashboard link is already open with filters and selections, that state is cleared before applying new filters and selections from the source dashboard. Users get a cleaner and more readily understood experience as they navigate between dashboards.

Optimize Dashboard Performance with Global Filters on Live Datasets

Focus on a subset of records in Snowflake or Google BigQuery (beta) without slowing down your dashboard. Add a global filter to dashboards with live data from these data sources to efficiently filter queries and widgets by the same field. For example, on a dashboard that's set up to monitor accounts, apply Region as the global filter to review trends across geographical areas.

Configure Filters for Live Datasets in Embedded Dashboards Using JSON

When you want to narrow the data shown in embedded dashboard tables and charts based on the Salesforce record context, consider using a filter. With filters applied to live datasets in embedded dashboards, you can simultaneously filter multiple widgets and components in a Lightning page by the same measure, dimension, or date field.

Get More Date Grouping Options for Live Data

Choosing the right level of granularity is key to identifying data trends over time. You can now group live data in Snowflake and Salesforce CDP by compound dates, such as Year-Quarter, Year-Month, Year-Week, and Year-Month-Day. For example, group the current year's orders further by quarter to spot seasonal changes in your pipeline.

Explore Google BigQuery Data Directly (Beta)

Skip the hassle of bringing Google BigQuery data into Salesforce and prepping it before you can analyze it. With Tableau CRM Direct Data for Google BigQuery, run explorations directly on your data in Google BigQuery after creating a live connection to it. You can query the data in real time, explore it in tables, and visualize it in charts. To continuously monitor important metrics and accelerate business decision-making, you can also include your BigQuery data in dashboards.

Set a Higher Query Limit in Explorer and Dashboard Widgets

You get more flexibility when exploring data with the increased maximum limit of 25,000 for query results in the explorer and dashboard widgets. Previously, you edited the query in SAQL or JSON mode to set a limit higher than 10,000.

SAQL and SQL

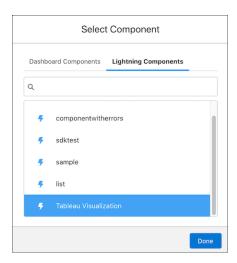
Convert multivalue fields to strings, and use more math and string functions in SQL queries. Add specificity to WHERE statements with the BETWEEN operator.

Include Custom Functionality in Tableau CRM Dashboards with Lightning Web Components (Generally Available)

Build richer and more customized dashboards with the power of Lightning Web Components. With Lightning Web Components, you can create customized reusable extensions for use anywhere in Lightning Experience. Create 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. This feature is now generally available to all Tableau CRM users.

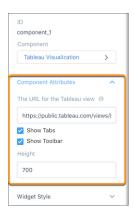
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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



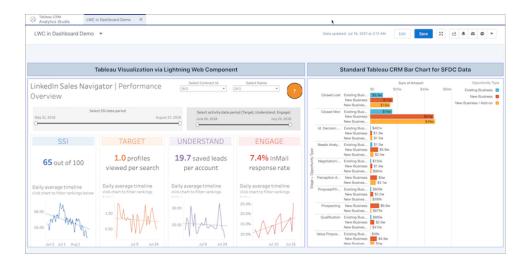
If no custom Lightning web components are available, the component list is empty.

Use the widget properties to define the attributes for your Lightning web component. Each component has different attributes that are defined by the component configuration, such as text fields, properties, Boolean options, and URLs.



Preview your changes, and save your dashboard.

Bring Tableau visualizations directly into your Tableau CRM dashboards. Create a Lightning web component with a Tableau visualization and drop it in with your Tableau CRM charts.



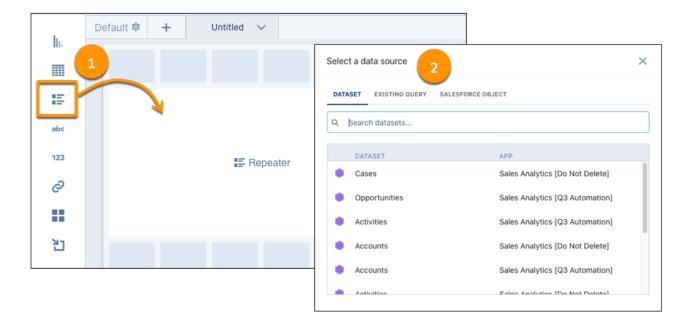
(1) Important: You can use Lightning web components in Tableau CRM dashboards with mobile web browsers. Lightning web components in dashboards aren't available in the Salesforce mobile app for iOS and Android or Tableau CRM for iOS and Android.

Turn Detailed Data into Eye-Catching Insights with Repeater Widgets (Generally Available)

Repeater widgets transform tabular data by showing select fields from a query in a scrollable list in your dashboard. Best of all, repeater widgets are based on the number of data rows in a query. So you create just one customized grouping of text, numbers, charts, and images, and you're done. Now your dashboard users can scroll through a customized and stylized view of query data. If you've been using repeater widgets, you can now add images and charts in addition to text and numbers.

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

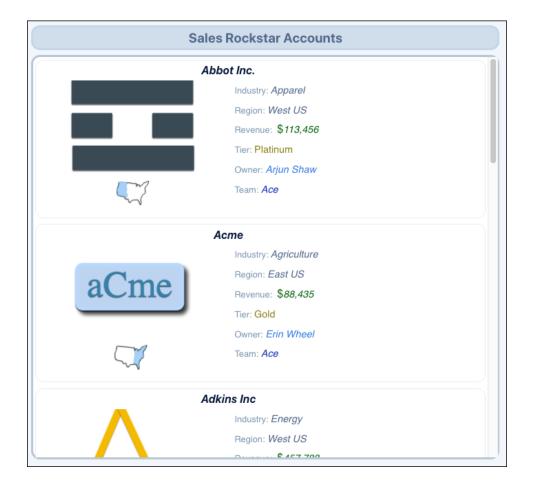
How: To create a repeater widget, add one to your dashboard (1), and then add a query (2).



Next, add and arrange text, numbers, charts, and images.



For each data row in the query, your customized layout repeats in a scrollable list in your dashboard.



SEE ALSO:

Salesforce Help: Transform Tabular Data with Repeater Widgets (Right-click to view in a new tab or window.)

Unlock Insights on Salesforce CDP Data (Generally Available)

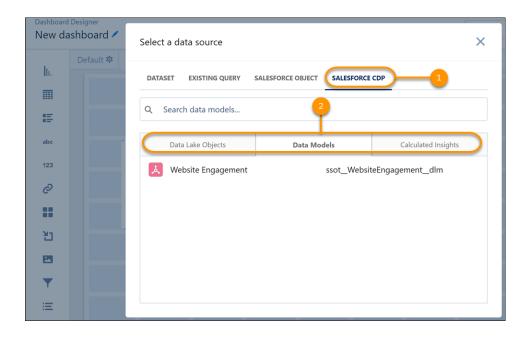
With Tableau CRM Direct Data for Salesforce CDP, view actionable insights on CDP data in embedded dashboards for any Salesforce record. Get started with Tableau CRM Direct Data for Salesforce CDP without moving your data, prepping it, or creating live datasets. This feature, now generally available, includes a streamlined setup since the last release. You can now explore CDP objects in Tableau CRM dashboards without creating a live connection from Data Manager's Connect tab or a live dataset for CDP 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.

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

Why: Let's say your dashboard shows service agents case management data. To further augment the analysis that Tableau CRM provides, include metrics on CDP data, such as customer behavior insights, in the same dashboard.

How: In the dashboard builder, create a query and click **Salesforce CDP** to select a data source (1). Select a data lake object, data model, or calculated insight (2).



You can explore and visualize the CDP data table that opens.



- Note: Live connections created with the Salesforce CDP Direct Data Connector (Beta) in Data Manager's Connect tab and live datasets associated with a CDP source table are deprecated and no longer supported by Salesforce. To continue working with dashboards that used these live datasets, replace them with CDP data queries built in the generally available version of CDP Direct Data.
- Note: Tableau CRM Direct Data for Salesforce CDP isn't supported in sandbox environments.

SEE ALSO:

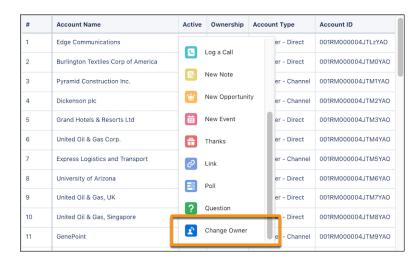
Salesforce Help: Salesforce CDP (Right-click to view in a new tab or window.)

Change Record Ownership in Tableau CRM

Change ownership in your data without leaving your Tableau CRM dashboard. Access the Change Owner action for objects like Account and Opportunity directly from the custom actions menu. Transfer account ownership easily when sales teams are updated.

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

How: For data values on charts or in table cells, hover over the record label to see if the action menu is available. Then click the value or cell to see the menu's contents. Select the **Change Owner** action and proceed to change the ownership.



Resize Table Columns and Wrap Text to Fit Content

Say goodbye to limited column resizing options in explorer and dashboard tables. You can now adjust a column width by dragging its right border. To make scanning table content even easier, take advantage of text wrapping for column headers and cells. The text wrapping option for cells replaces the Number of Lines per Row menu in the table properties panel.

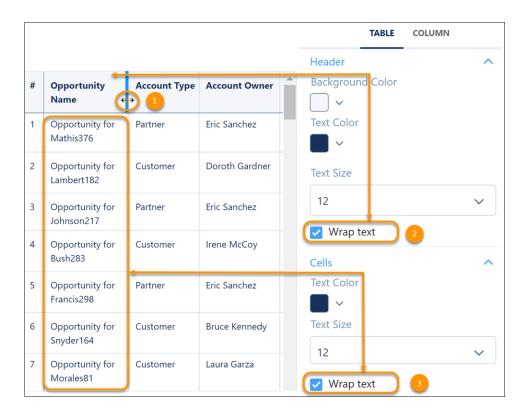
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To resize a column, hover over the column header's right edge for the resize cursor to appear (1). Drag the column border until the content fits how you like it.



Note: If you resize columns in an explorer lens or a dashboard in edit mode, you can save your changes. But, changes made in the dashboard view or preview mode aren't preserved.

To control text flow, enable **Wrap text** in the Header (2) and Cell (3) sections of the table properties panel. Text wrapping is enabled by default for new tables.

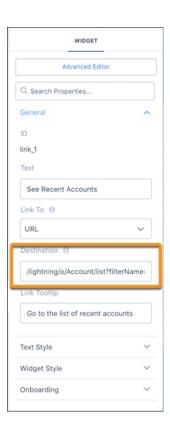


Add Relative and Dynamic URLs in Link Widgets

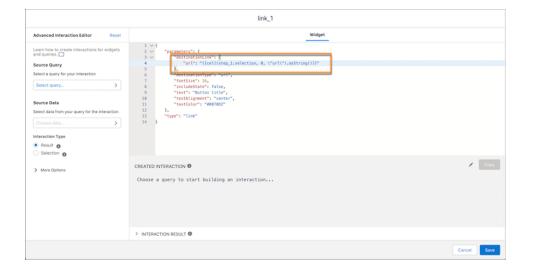
The link widget now supports relative URL destinations that start with a slash and dynamic URLs created via bindings. Use relative links to connect other pages, like a list of recently viewed opportunities, inside the Salesforce experience. Create dynamic links based on query results and user selections. When a user selects an account record, the binding for that URL value now links to that account's external home page.

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 a relative link, in the Destination field of the link widget properties panel, enter a valid URL that starts with a slash. An example relative link value is /lightning/o/Account/list?filterName=Recent. This URL opens the Recently Viewed Accounts view in Lightning Experience.



For a dynamic link, in the link widget properties panel, click **Advanced Editor**. Enter the destinationLink with a url parameter that is a binding. The binding must be for an existing step that contains valid URL values in the record data. An example binding is { cell(step_1.selection, 0, \"url\").asString()}, where url is a valid URL.

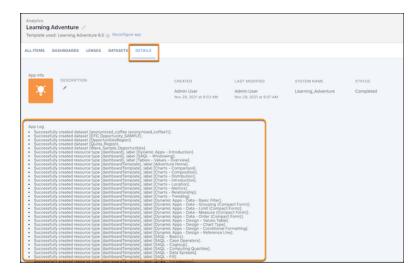


Access Tableau CRM Templated App Logs Anytime in Analytics Studio

See which assets were created for your templated app or check why app creation failed. Find valuable information for Tableau CRM templated apps on the Details page in Tableau CRM Analytics Studio. Previously, this information was available only by email to the user who created the 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: In Tableau CRM Analytics Studio, select the templated app and open it. On the app landing page, click the **Details** tab. The App Log lists the assets created and their status, as well as the overall app status.



Improved Experience When Navigating Between Tableau CRM Dashboards

Tableau CRM dashboard links to other dashboards now handle state cleanly, resetting the filters and selections when navigating to an open dashboard tab instead of adding to the existing state. If the destination dashboard link is already open with filters and selections, that state is cleared before applying new filters and selections from the source dashboard. Users get a cleaner and more readily understood experience as they navigate between dashboards.

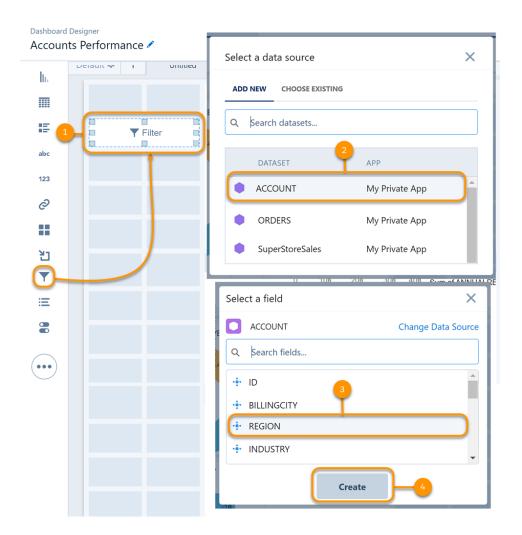
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Optimize Dashboard Performance with Global Filters on Live Datasets

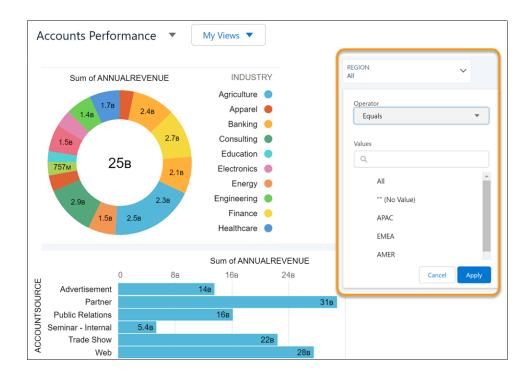
Focus on a subset of records in Snowflake or Google BigQuery (beta) without slowing down your dashboard. Add a global filter to dashboards with live data from these data sources to efficiently filter queries and widgets by the same field. For example, on a dashboard that's set up to monitor accounts, apply Region as the global filter to review trends across geographical areas.

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: Open a dashboard in the dashboard designer, and add a filter widget (1). Select a Snowflake or Google BigQuery (beta) dataset as the data source (2). Then, specify the field to use as the global filter (3). Click **Create** (4). Save the dashboard when done.



In the dashboard, select the filter value you want to use and click **Apply**.

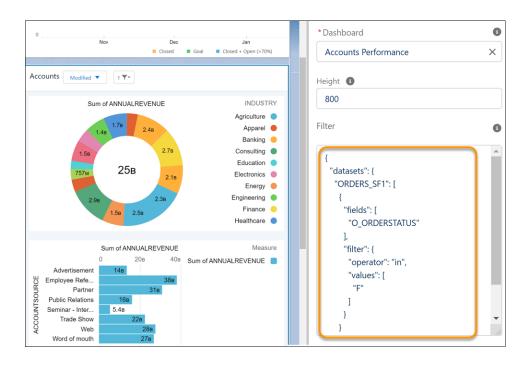


Configure Filters for Live Datasets in Embedded Dashboards Using JSON

When you want to narrow the data shown in embedded dashboard tables and charts based on the Salesforce record context, consider using a filter. With filters applied to live datasets in embedded dashboards, you can simultaneously filter multiple widgets and components in a Lightning page by the same measure, dimension, or date field.

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 add a filter to an embedded dashboard, enter its JSON strings in the Filter String box of the embedded dashboard.



SEE ALSO:

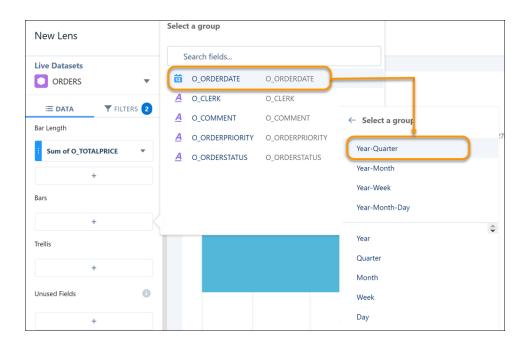
Salesforce Help: Filter and Selection Syntax for Embedded Dashboards (Right-click to view in a new tab or window.)

Get More Date Grouping Options for Live Data

Choosing the right level of granularity is key to identifying data trends over time. You can now group live data in Snowflake and Salesforce CDP by compound dates, such as Year-Quarter, Year-Month, Year-Week, and Year-Month-Day. For example, group the current year's orders further by quarter to spot seasonal changes in your pipeline.

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 group the current year's orders by quarter, click + under Bars and select the order date field. Then, select **Year-Quarter**.



Explore Google BigQuery Data Directly (Beta)

Skip the hassle of bringing Google BigQuery data into Salesforce and prepping it before you can analyze it. With Tableau CRM Direct Data for Google BigQuery, run explorations directly on your data in Google BigQuery after creating a live connection to it. You can query the data in real time, explore it in tables, and visualize it in charts. To continuously monitor important metrics and accelerate business decision-making, you can also include your BigQuery data in dashboards.

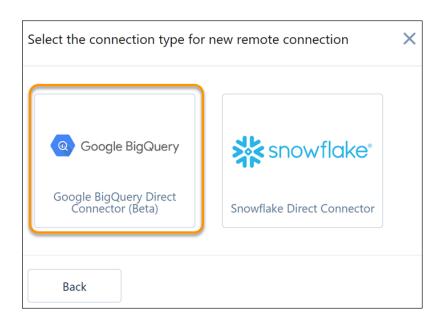
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



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 **Analytics**, then select Settings. Click Enable Direct Data for external data sources.

From the Data Manager, add a live connection using the Google BigQuery Direct Connector (Beta) type.



From the Data tab, create a live dataset and enable a BigQuery source table that is available with the connection that you created.



Assign the live dataset to an Analytics app to control which Salesforce users, roles, and groups have access to explore BigQuery data with the connection. To begin exploring, click the live dataset from the Datasets tab in Analytics Studio.

Set a Higher Query Limit in Explorer and Dashboard Widgets

You get more flexibility when exploring data with the increased maximum limit of 25,000 for query results in the explorer and dashboard widgets. Previously, you edited the query in SAQL or JSON mode to set a limit higher than 10,000.

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.

T FILTERS 1 **≡** DATA ★ What do you want to see? Just start typing... Bar Length Sum of Amount 0 2м 4м Abbott358 Inc 99ĸ Abbott372 Inc Bars Adkins907 Inc Bailey19 Inc Banks163 Inc 606ĸ Account Name Bass661 Inc 1м Benson594 Inc 202ĸ Benson657 Inc 1.2м Bowen938 Inc 2.6м Account Name Bowman347 Inc **Trellis** 209ĸ Bradley715 Inc Bridges776 Inc Brown495 Inc 1.1м Buchanan609 Inc 3.2м **Unused Fields** Set Query Results Limit 200 5.4м Cancel **Apply** 4.3м **Query Limit Default**

How: From an explorer lens or dashboard, in the Query Limit section, click Edit (1). Enter the limit of your query results (2). Click Apply (3).



SAQL and SQL

Convert multivalue fields to strings, and use more math and string functions in SQL queries. Add specificity to WHERE statements with the BETWEEN operator.

IN THIS SECTION:

Expand WHERE's Range with the BETWEEN Operator in SQL

Use the BETWEEN operator in the WHERE clause to check whether numeric, string, and date data types fall within a given range (inclusive). For numbers, it's shorthand for >= AND =>. You can use this operator with aggregate, window, and scalar functions.

Convert Multivalue Fields to String Fields in SQL

Edit

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 SQL function, MV TO STRING(), shows all items in a multivalue field. The field remains multivalue in the dataset.

Use Trigonometry and String Parsing Functions in SQL Queries

Use the same functionality as your other favorite SQL implementations with SQL for Tableau CRM's new trigonometry and string functions.

Expand where's Range with the BETWEEN Operator in SQL

Use the BETWEEN operator in the WHERE clause to check whether numeric, string, and date data types fall within a given range (inclusive). For numbers, it's shorthand for >= AND =>. You can use this operator with aggregate, window, and scalar functions.

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 BETWEEN in your query, after the WHERE clause, add <**expr**> BETWEEN (SYMMETRIC | ASYMMETRIC) <**lower bound**> AND <**upper bound**>.

Here's a simple numeric example. This example filters results on flights whose prices are between \$300 and \$600.

SELECT price, origin, dest FROM FlightsData WHERE price BETWEEN 300 and 600 ORDER BY price ASC

Dest	Origin	Price
PHX	LAX	300
LAX	PHX	400
PHX	LAX	400
LAX	PHX	500
LAX	SFO	550
LAX	OAK	560
SFO	LAX	600
OAK	LAX	600
LAX	PHX	600

SEE ALSO:

SQL for Tableau CRM Developer Guide: BETWEEN Operator (Right-click to view in a new tab or window.)

Convert Multivalue Fields to String Fields in SQL

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 SQL function, MV_TO_STRING(), shows all items in a multivalue field. The field remains multivalue in the 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.

How: From Settings, in the Quick Find box, enter <code>Analytics</code>, and then select **Settings** from the list of Analytics options. In Settings, select **Enable indexing of multivalue fields in Tableau CRM**.





🕜 Note: 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 indexing turned off, the function returns the first value in the first field only.

This query converts the multivalue field flight attendants to a string and returns values that contain the name "maria."

```
SELECT MV TO STRING(flight attendants) as Flight Attendants
FROM "Flights"
WHERE "flight attendants" IN ('maria')
```

Flight_Attendants kate, maria, mark, martin, sara maria, sarah kate, maria, mark, martin, sara maria, sarah kate, maria, mark, martin, sara maria, sarah

This query returns all values of the flight classes field and delimits them with ";".

```
SELECT MV_TO_STRING(flight_classes, ';;') as Flight_Classes
FROM "Flights"
LIMIT 10;
```

Flight_Classes	
business;;economy	
business;;economy;;first	
business;;economy	
business;;economy	
business;;economy	
business;;economy;;first	
business;;economy	
business;;economy	
business;;economy	

Flight_Classes

business;;economy;;first

SEE ALSO:

SQL for Tableau CRM Developer Guide: mv_to_string (multivalue_column_name, [delimeter]) (Right-click to view in a new tab or window.)

Use Trigonometry and String Parsing Functions in SQL Queries

Use the same functionality as your other favorite SQL implementations with SQL for Tableau CRM's new trigonometry and string functions.

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: These functions are new.

Math

- ACOS (n)
- ASIN(n)
- ATAN (**n**)
- COS (n)
- DEGREES (n)
- PI()
- RADIANS (n)
- SIGN (n)
- SIN (n)
- TAN (n)

The trigonometry functions use this pattern.

```
SELECT trigFunction(measurement) as value
FROM dataset;
```

For example, find the cosine of 60 degrees.

```
SELECT COS(RADIANS(60)) as cosValue
FROM "Opportunity"
LIMIT 1;
```

cosValue

0.5

First, the radians () function converts the degrees to radians, which returns 1.0472. For those of you who remember geometry, that's $\pi/6$. Then, it takes the cosine of 1.0472, and the query returns the value of approximately 0.5.

String

- ASCII (char)
- CHR (char)
- ENDS_WITH(source_str, search_str)
- INDEX OF (source str, search str, [position, occurrence])
- POSITION(search str IN source str)
- STARTS WITH (source str, search str)

Let's convert the UTF-8 character to its equivalent numeric value.

```
SELECT ASCII('C') as "intValue"
FROM "SuperStore"
LIMIT 1;
```

```
intValue
97
```

Do the reverse and convert the numeric value to a UTF-8 character.

```
SELECT CHR(97) as "charValue"
FROM "SuperStore"
LIMIT 1;
```

```
charValue
C
```

The STARTS_WITH() and ENDS_WITH() functions accept two parameters: a source string, and the substring to search within it. Both functions return a Boolean value that confirms whether the source string contains the substring at the beginning or end of the string.

This example checks whether the value in the City field begins with "Hen."

```
SELECT City, STARTS_WITH(City, "Hen") as "startValue"
FROM "SuperStore"
LIMIT 5;
```

City	startValue
Henderson	true
Henderson	true
Los Angeles	false
Fort Lauderdale	false
Fort Lauderdale	false

This example checks whether the value in the City field ends with "son."

```
SELECT ENDS_WITH(City, "son") as "endsWith"
FROM "SuperStore"
LIMIT 5;
```

City	endValue
Henderson	true
Henderson	true
Los Angeles	false
Fort Lauderdale	true
Fort Lauderdale	true

The POSITION () function returns an integer that indicates the first occurrence of a substring in a given string. If the substring isn't found, the function returns 0.

This example returns the position of the substring "der" in the City field.

```
SELECT City, POSITION('der' IN City) as "Pos"
FROM "SuperStore"
LIMIT 5;
```

City	Pos
Henderson	4
Henderson	4
Los Angeles	0
Fort Lauderdale	9
Fort Lauderdale	9

INDEX_OF() has the same functionality as POSITION() with two additional optional capabilities. It follows the syntax INDEX_OF(source_str, search_str, [position, occurrence]). The position parameter lets you select the index from which the string is searched. If the search string has more than one instance of the substring, you can use occurrence to choose which instance to return.

This example returns the index of the second occurrence of the letter "e" in the first five cities in the dataset.

```
SELECT City, INDEX_OF(City, 'e', 1, 2) as "indexValue"
FROM "Superstore"
LIMIT 5;
```

City	indexValue
Henderson	5
Henderson	5

City	indexValue
Los Angeles	10
Fort Lauderdale	15
Fort Lauderdale	15

SEE ALSO:

SQL for Tableau CRM Developer Guide: String Functions and Operators (Right-click to view in a new tab or window.) *SQL for Tableau CRM Developer Guide*: Math Functions (Right-click to view in a new tab or window.)

Einstein Discovery

Use multiclass models to predict outcomes with 3 to 10 possible values. Segment your data with free text clustering. Embed multiclass predictions in Salesforce flows. Fine-tune prediction accuracy with trending data.

IN THIS SECTION:

Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)

Einstein Discovery introduces multiclass classification models so that you can predict probable outcomes among up to 10 categories. For example, a manufacturer can predict, based on customer attributes, which of three service contracts a customer 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.

Reveal Untapped Insights from Your Unstructured Data (Pilot)

Unstructured data in the form of social media posts, surveys, and product reviews often goes unused because the data is hard to process. Text clustering enables you to interpret raw data and reveals themes to make data-backed decisions. Text clustering ignores low information words such as "a" or "the," surfaces prominent words, and buckets them into clusters. Text clustering reduces unstructured data to its top keywords and enables you to quickly reveal hidden insights and improve decision making.

Embed Multiclass Predictions in Salesforce Flows

The Einstein Discovery flow core action in Salesforce flows now supports predictions with multiclass models. Multiclass models predict the most likely outcome among up to 10 possible outcomes. For example, if you offer seven insurance products, use a multiclass model to predict which insurance product a new customer will likely purchase. When you run the flow, the output of this action is the predicted value (the predicted winning insurance product, for example). The flow object contains the data as a variable. Optionally, you can include top predictors.

Fine-Tune Prediction Accuracy with Trending Data (Pilot)

By default, Einstein Discovery derives prediction values for the present moment based on current information. That's great for right now, but what if that outcome won't be known for weeks or months into the future? And, what if that future outcome is influenced by time-based factors, such as seasonal trends or other fluctuation patterns? For numeric outcomes, Einstein Discovery now lets you provide trending data, which Einstein factors into the predictions it derives. That way, your projected predictions more accurately reflect anticipated future outcomes, enabling you to make better planning decisions today.

Handle Missing Values in Your Datasets (Pilot)

With automatic imputation of categorical fields, you're able to handle missing dataset values without code or deleting rows of useful data. During story setup, Einstein Discovery employs a feature engineering process using available data from other training model variables to predict what the missing values could be. Achieve a complete dataset that improves the accuracy of your prediction models, reduces bias, and produces more accurate prediction models.

Get More Insightful Column Analysis in Einstein Data Reports

When you initiate Einstein in your reports, Einstein captures and presents a comprehensive profile for each column in an enhanced profile card. Start with analyzing occurrences that help you understand column metadata. Occurrences now include frequency amounts, nulls, and column aggregates generated during report generation, such as min, max, median, and average. You can also initiate descriptive insights while in a report. With enhanced column analysis you get actionable and deeper insights in your reports in one place.

Improve Dataset Distributions with Class Weights (Generally Available)

Class weights enable you to achieve a more balanced and accurate representation of your data by synthetically tuning data distribution. Class weights upsample data to increase frequency in minority class rows and downsample it to reduce frequency in majority class rows. Work with the data that you have without relying on external tools for this crucial data manipulation step.

Get Report Insights in More Languages

Report insights are now available in Japanese, with more languages scheduled on orgs enabled with the language.

Correct Drifting Models Faster with Enhanced Live Data Monitoring

Live data monitoring detects when your production data contains high levels of missing or out-of-bounds values—indications that your model's accuracy is declining. Model Manager surfaces alerts so that you can easily see what's happening in your data. Also, when you deploy a new model version, Einstein Discovery now resets and tabulates monitoring statistics for the latest version only. Previously, Model Manager retained obsolete monitoring statistics for all previous model versions.

Upload External Models Faster with Automatic Variable Detection

When you upload an externally built model into Salesforce, Model Manager now detects variables and their data types directly from the file that you upload. You no longer enter this information manually, which saves you time, especially for models with many variables.

Embed Multiclass Predictions Using the Einstein Predictions Panel

Now you can embed predictions from multiclass models directly in Lightning record pages and Experience Cloud sites pages. Multiclass models predict the most likely outcome among up to 10 possible outcomes. For example, if you offer five support contract levels, use a multiclass model to predict which support contract level a new customer will likely purchase. The Einstein Predictions panel shows the predicted value (the predicted winning support contract, for example), along with a bar chart of ranked probabilities by value (all support contracts). Optionally, you can show top predictors and out-of-bounds values.

Build Higher-Quality Models with Data Leakage Detection

Data leakage occurs when your training data contains the information that you're trying to predict. Leakage results in models that score optimistically high in training but perform less accurately on live data. Einstein Discovery provides another way to detect possible data leakage. If a predictor variable always leads to the same outcome, Einstein notifies you with a potential data leakage alert. That way, you can investigate and remove leaky predictor variables from your model to produce more realistic models that perform better at predicting outcomes.

Manage Deployed Models Without Redeploying

An enhanced Settings panel in Model Manager makes it easier to update settings for deployed models. For example, you can now change the connected object or actionable variables right in Model Manager. Previously, such changes required you to launch the deployment wizard and redeploy the model.

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.

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 create a story based on a randomly selected subset of observations in your data.

SEE ALSO:

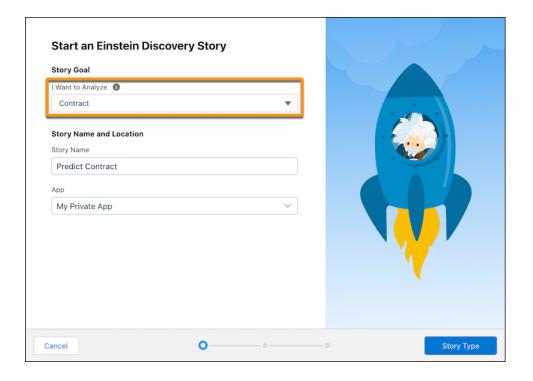
Einstein Release Notes

Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)

Einstein Discovery introduces multiclass classification models so that you can predict probable outcomes among up to 10 categories. For example, a manufacturer can predict, based on customer attributes, which of three service contracts a customer 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.

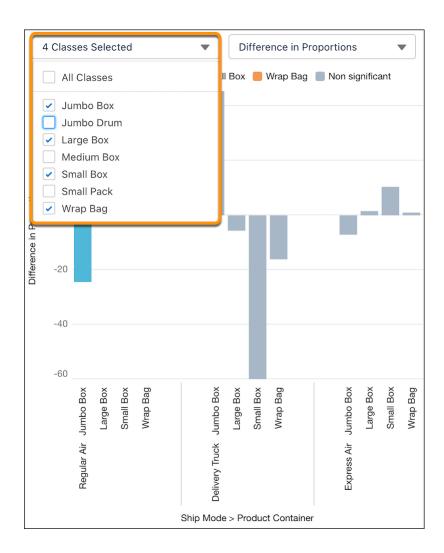
How: During story creation, in the I Want to Analyze list, select a text column that contains 3–10 unique categories.



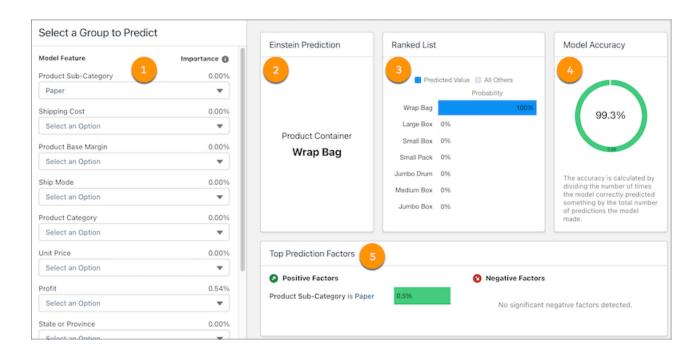
During story creation, Einstein Discovery analyzes your data, generates the multiclass model, and shows you insights into your data.



In the insight, the explanatory text (1) describes how all the classes are related. The interactive chart (2) displays all classes by default. To focus on the classes that you're most interested in, select those you want to show.

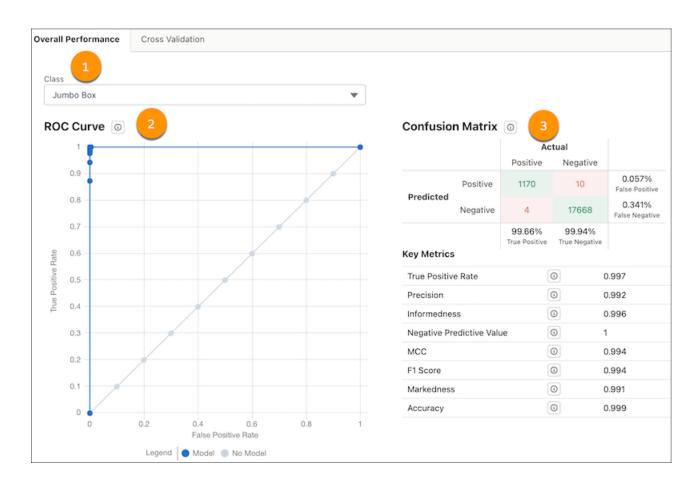


To perform what-if probability calculations for different classes and groups, click **Predictions** on the story toolbar.



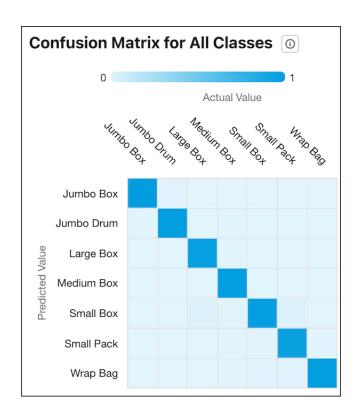
Select one or more features to predict (1). You see which class Einstein predicted as the most likely outcome (2) along with ranked probabilities (3), the model accuracy for the predicted class (4), and top prediction factors (5).

To help you assess model quality, model metrics for multiclass models show performance statistics per class and for all classes. On the story toolbar, click **Metrics** and, under Model Metrics, click **Model Evaluation**.



On the Overall Performance tab, select a class (1) to see its individual ROC curve (2) and confusion matrix (3).

To see the Confusion Matrix for All Classes, scroll down. This graph shows you at a glance how accurately the model predicts each class.



Where the row and column for each class intersect in the table, the color of the square indicates the model's accuracy. The legend shows a color progression from 0 to 1, with 1 representing 100% accuracy. In this example, the darker blue diagonal indicates a high percentage of true positives.

SEE ALSO:

Embed Multiclass Predictions in Salesforce Flows
Embed Multiclass Predictions in Your Dataset During Data Prep
Embed Multiclass Predictions Using the Einstein Predictions Panel

Reveal Untapped Insights from Your Unstructured Data (Pilot)

Unstructured data in the form of social media posts, surveys, and product reviews often goes unused because the data is hard to process. Text clustering enables you to interpret raw data and reveals themes to make data-backed decisions. Text clustering ignores low information words such as "a" or "the," surfaces prominent words, and buckets them into clusters. Text clustering reduces unstructured data to its top keywords and enables you to quickly reveal hidden insights and improve decision making.

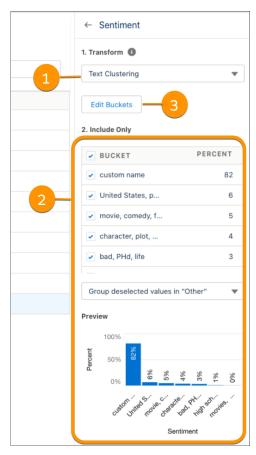
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



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.



Select a story variable, and select **Text Clustering** (1) from the Transform menu. Click **Update Story**.

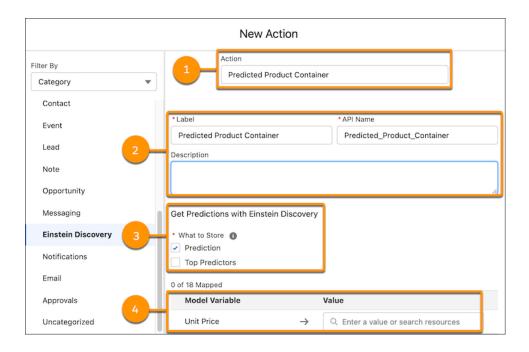
Clusters of rows show the top three keywords for each cluster (2). You can uncheck clusters to filter them into an "Other" category. Click **Edit Buckets** (3) to give clusters a more descriptive label.

Embed Multiclass Predictions in Salesforce Flows

The Einstein Discovery flow core action in Salesforce flows now supports predictions with multiclass models. Multiclass models predict the most likely outcome among up to 10 possible outcomes. For example, if you offer seven insurance products, use a multiclass model to predict which insurance product a new customer will likely purchase. When you run the flow, the output of this action is the predicted value (the predicted winning insurance product, for example). The flow object contains the data as a variable. Optionally, you can include top predictors.

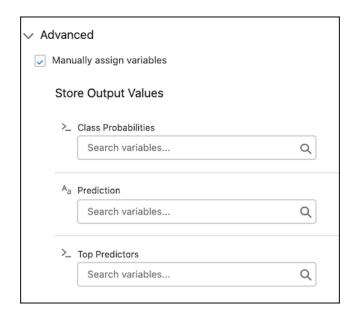
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Flow Builder, add an Action element to the flow, and select the Einstein Discovery category.



Select a deployed multiclass model from the Action field (1), and specify action metadata (2). Select whether to store predictions and top predictors (3), and map model variables (4).

If you want, expand Advanced, select **Manually assign variables**, and selectively store output values (class probabilities, the prediction, and top predictors).



SEE ALSO:

Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)

Salesforce Help: Flow Core Actions: Einstein Discovery (Right-click to view in a new tab or window.)

Fine-Tune Prediction Accuracy with Trending Data (Pilot)

By default, Einstein Discovery derives prediction values for the present moment based on current information. That's great for right now, but what if that outcome won't be known for weeks or months into the future? And, what if that future outcome is influenced by time-based factors, such as seasonal trends or other fluctuation patterns? For numeric outcomes, Einstein Discovery now lets you provide trending data, which Einstein factors into the predictions it derives. That way, your projected predictions more accurately reflect anticipated future outcomes, enabling you to make better planning decisions today.

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.



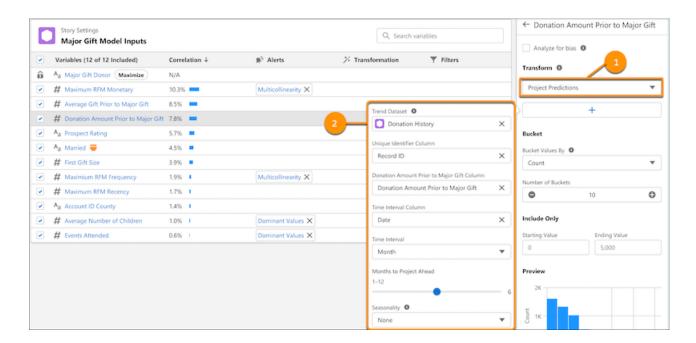
Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never 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: Trend-adjusted predictions help you make better decisions. For example, suppose sales of cold-weather clothing are higher in the winter than the summer and it's approaching October. You're nervous that the current Einstein predictions model isn't accounting for the anticipated spike in demand in the coming months. By providing trending sales data and enabling projected predictions, Einstein gives you trend-adjusted predictions that better support your inventory restocking decisions.

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

During story setup, select a numeric variable that changes over time and, in the settings panel, select the Project Predictions transform (1).



Specify the trend dataset (2) that contains historical data for this variable, and then specify which dataset columns contain the unique identifier, outcome values, and time interval. Select the time interval (Month or Quarter) and number of months or quarters to project ahead, and specify seasonality if applicable. Save your changes, create a story version, and deploy the model. At prediction time, Einstein applies the trending data and adjusts the predicted values accordingly.

Handle Missing Values in Your Datasets (Pilot)

With automatic imputation of categorical fields, you're able to handle missing dataset values without code or deleting rows of useful data. During story setup, Einstein Discovery employs a feature engineering process using available data from other training model variables to predict what the missing values could be. Achieve a complete dataset that improves the accuracy of your prediction models, reduces bias, and produces more accurate prediction models.

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.

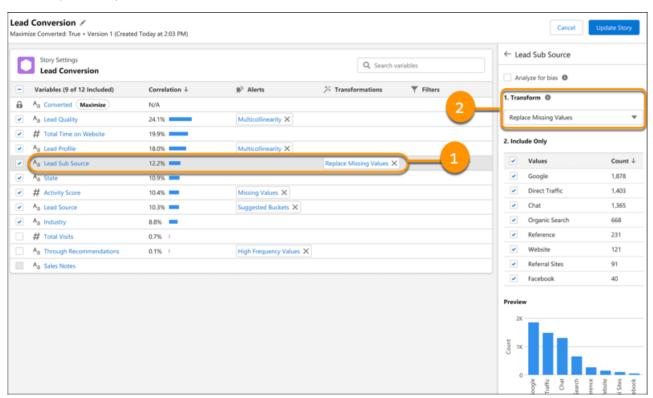


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You can provide feedback and suggestions for this feature in the applicable IdeaExchange group in the Trailblazer Community.

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

In story settings, select the variable with the Replace Missing Values alert. (1). Select the **Replace Missing Values** (2) transformation, and click **Update Story**.

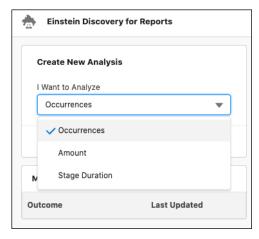


Get More Insightful Column Analysis in Einstein Data Reports

When you initiate Einstein in your reports, Einstein captures and presents a comprehensive profile for each column in an enhanced profile card. Start with analyzing occurrences that help you understand column metadata. Occurrences now include frequency amounts, nulls, and column aggregates generated during report generation, such as min, max, median, and average. You can also initiate descriptive insights while in a report. With enhanced column analysis you get actionable and deeper insights in your reports in one place.

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 your report, click **Analyze** in your report. For the I want to Analyze field, select an occurrences analysis or select a field for a goal analysis.



Profile cards appear to the right of the report after analysis is complete. Click the **Einstein** button in the card to initiate a new analysis.



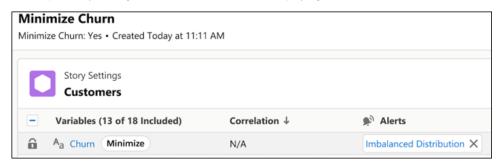
Improve Dataset Distributions with Class Weights (Generally Available)

Class weights enable you to achieve a more balanced and accurate representation of your data by synthetically tuning data distribution. Class weights upsample data to increase frequency in minority class rows and downsample it to reduce frequency in majority class rows. Work with the data that you have without relying on external tools for this crucial data manipulation step.

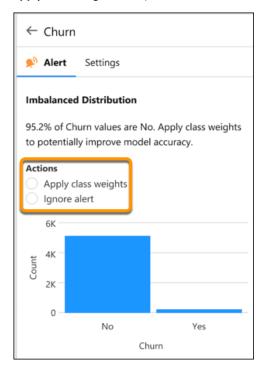
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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.



Apply class weights to improve data distribution, or **Ignore alert**, then update the story.



Get Report Insights in More Languages

Report insights are now available in Japanese, with more languages scheduled on orgs enabled with the language.

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

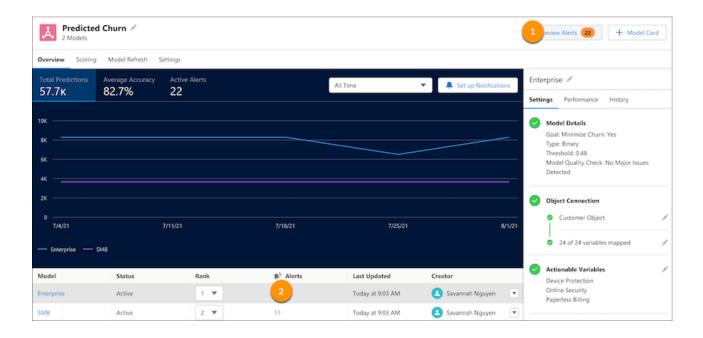
When: This functionality is available on a rolling basis starting in the Spring '22 release.

Correct Drifting Models Faster with Enhanced Live Data Monitoring

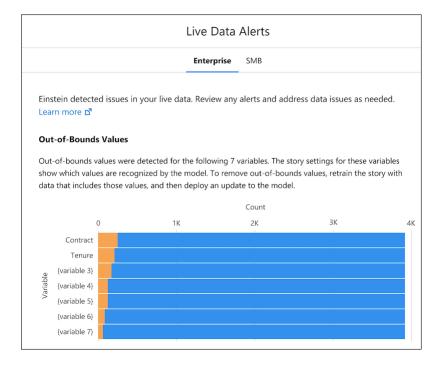
Live data monitoring detects when your production data contains high levels of missing or out-of-bounds values—indications that your model's accuracy is declining. Model Manager surfaces alerts so that you can easily see what's happening in your data. Also, when you deploy a new model version, Einstein Discovery now resets and tabulates monitoring statistics for the latest version only. Previously, Model Manager retained obsolete monitoring statistics for all previous model versions.

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 Model Manager, open a prediction definition. Einstein Discovery shows you when detected missing or out-of-bounds values exceed configured thresholds.



To investigate, click either **Review Alerts** (1) or the link in the Alerts column (2). The Live Data Alerts window shows you alerts with tabs for each model in the prediction definition.



Bar charts show you occurrences of data issues by outcome value. Orange represents the number of rows with issues (out-of-bound or missing values). To see details for an outcome value, hover over its bar in the chart.



To review and tune story settings, click **View Story** at the bottom of the screen. To address out-of-bounds issues, consider refreshing the Tableau CRM dataset with data that better represents the outcome you want to predict. To address missing values, consider using the Replace Missing Values transformation in story settings. When finished, create a story version to automatically train the model, and then deploy and update the model in Salesforce. Einstein automatically resets performance monitoring statistics for the latest model version.

SEE ALSO:

Salesforce Help: Handle Live Data Alerts (Right-click to view in a new tab or window.)

Upload External Models Faster with Automatic Variable Detection

When you upload an externally built model into Salesforce, Model Manager now detects variables and their data types directly from the file that you upload. You no longer enter this information manually, which saves you time, especially for models with many variables.

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: Upload an External Model (Right-click to view in a new tab or window.)

Embed Multiclass Predictions Using the Einstein Predictions Panel

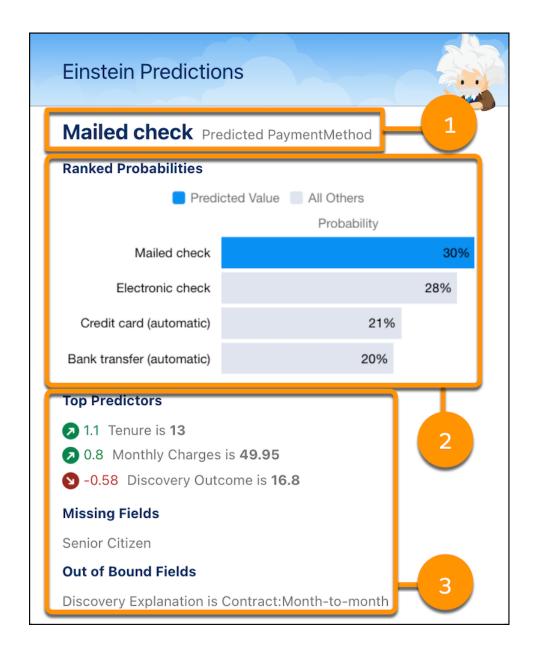
Now you can embed predictions from multiclass models directly in Lightning record pages and Experience Cloud sites pages. Multiclass models predict the most likely outcome among up to 10 possible outcomes. For example, if you offer five support contract levels, use a multiclass model to predict which support contract level a new customer will likely purchase. The Einstein Predictions panel shows the predicted value (the predicted winning support contract, for example), along with a bar chart of ranked probabilities by value (all support contracts). Optionally, you can show top predictors and out-of-bounds values.

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 configure the component, you must have these permissions.

- To design Lightning Record pages, you must have the Customize Application system permission.
- To design Experience Cloud sites pages, you must have the Create and Set Up Experiences and be a member of the site.
- To view the predictions on a page, users must have the View Einstein Discovery Recommendations permission.

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



While designing a record or sites page, drag the Einstein Predictions Standard Lightning component to the page layout. Choose a deployed multiclass model and then configure the display settings. The panel shows the predicted outcome (1), chart of ranked probabilities (2) and, if configured, top predictors, missing fields, and out-of-bounds fields (3).

SEE ALSO:

Predict Outcomes for Multiple Categories with Multiclass Models (Generally Available)

Salesforce Help: Add Einstein Predictions to a Lightning Page (Right-click to view in a new tab or window.)

Salesforce Help: Einstein Predictions (for Experience Builder site pages) (Right-click to view in a new tab or window.)

Build Higher-Quality Models with Data Leakage Detection

Data leakage occurs when your training data contains the information that you're trying to predict. Leakage results in models that score optimistically high in training but perform less accurately on live data. Einstein Discovery provides another way to detect possible data leakage. If a predictor variable always leads to the same outcome, Einstein notifies you with a potential data leakage alert. That way, you can investigate and remove leaky predictor variables from your model to produce more realistic models that perform better at predicting outcomes.

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 example, during story creation, Einstein detects that a predictor variable (X) always leads to the same outcome (Y). To see data alerts, on the Story toolbar, click **Review Alerts**.



Scroll down to see the Potential Data Leakage alert, which describes one or more variables that are suspected of possible data leakage. Einstein prompts you to exclude problem variables or to ignore the alert.

SEE ALSO:

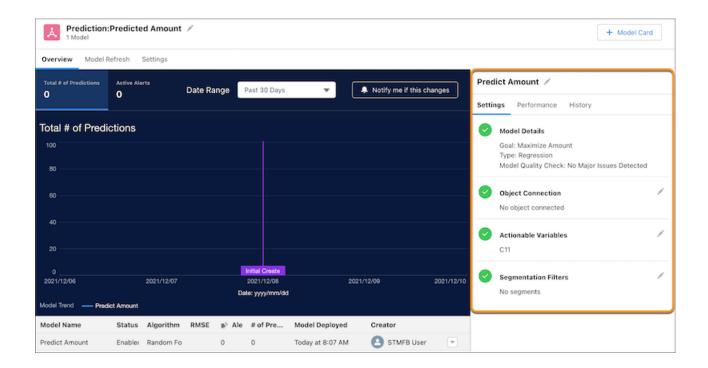
Salesforce Help: Data Leakage Alert (Right-click to view in a new tab or window.)

Manage Deployed Models Without Redeploying

An enhanced Settings panel in Model Manager makes it easier to update settings for deployed models. For example, you can now change the connected object or actionable variables right in Model Manager. Previously, such changes required you to launch the deployment wizard and redeploy the 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: In Model Manager, open a model. In the side panel, the Settings tab shows you groups of settings.

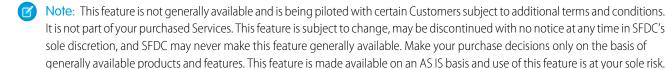


Click the edit icon next to the settings that you want to update, and Model Manager prompts you to make and save your changes.

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.

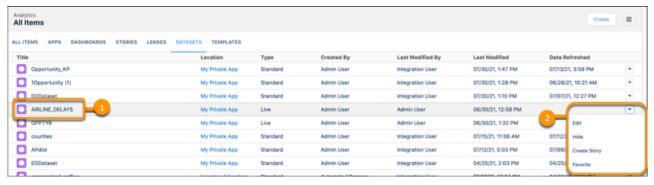
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



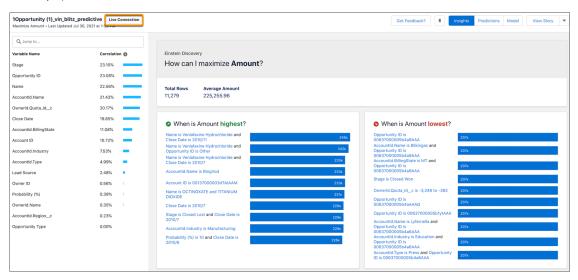
You can provide feedback and suggestions for this feature in the applicable IdeaExchange group in the Trailblazer Community.

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).



The story opens with a Live Connection notification.



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 create a story based on a randomly selected subset of observations in your data.

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How: If you're 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.

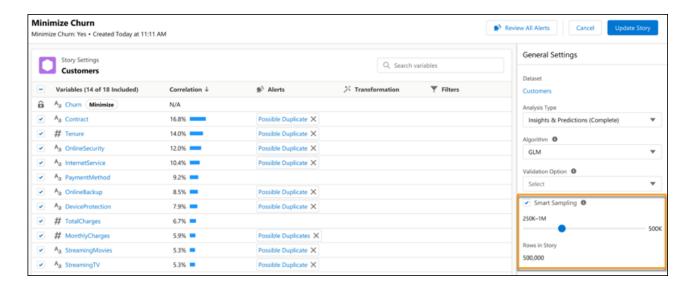


Tableau CRM for Everyone

With intelligent, self-service analytics, Ask Data for Salesforce (beta) guides you in answering your data questions. Display collections of curated dashboards and lenses on Lightning pages with the new Tableau CRM Collection component. Manage how you want your collection dashboards to be seen, and enable consistent views for shared users.

IN THIS SECTION:

Get Insights More Easily with Ask Data for Salesforce (Beta)

Get answers to business questions without data knowledge or even a dashboard. Just enter questions in the Tableau CRM Home search bar, and Ask Data for Salesforce provides insight visualizations and metrics, smart recommendations, and next-best insight suggestions. You can give feedback by selecting fields, values, and data to map to your question, and the service continually improves its interpretation of your business language. This beta release makes Ask Data for Salesforce even easier to use with more on-screen assistance and enhanced dataset prediction accuracy.

Add Collections Directly to Your Lightning Pages

You can now easily insert and display collections of curated dashboards and lenses in your Lightning pages with the new Tableau CRM Collection component. Drag the Collection component to the canvas, and select a collection. The Collection component intuitively displays the collection in a concise panel, enabling users to view relevant insights in the place where they work.

Share Dashboard Views Through Collections

In your collections you can now curate and share precise dashboard views that target select users or project teams. When adding Tableau CRM dashboards to a collection, you have the option to add them in their original form or preserve a view with selected filter and dashboard options. Manage how you want your collection dashboards to be seen and enable consistent views for your users.

Find Your Way with Navigation Breadcrumbs

Freely explore Analytics and get back to where you want to be using the detailed Analytics navigation breadcrumbs. The location-assisted navigation enables you to go back a step or all the way back home with visual cues and links that guide you along the way.

Get Insights More Easily with Ask Data for Salesforce (Beta)

Get answers to business questions without data knowledge or even a dashboard. Just enter questions in the Tableau CRM Home search bar, and Ask Data for Salesforce provides insight visualizations and metrics, smart recommendations, and next-best insight suggestions. You can give feedback by selecting fields, values, and data to map to your question, and the service continually improves its interpretation of your business language. This beta release makes Ask Data for Salesforce even easier to use with more on-screen assistance and enhanced dataset prediction accuracy.

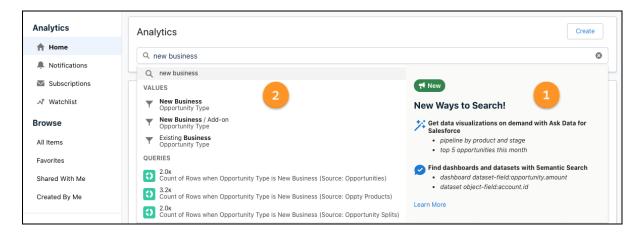
Where: This change applies to Tableau CRM in Lightning Experience and Salesforce Classic. Tableau CRM is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.



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.

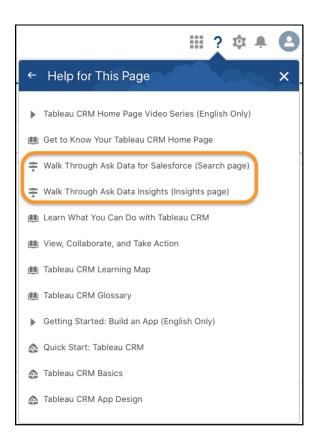
How: Contact Salesforce Support to enable the feature. From Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. Select **Enable Ask Data for Salesforce**. The service becomes available after 24 hours.

To get started, type a data question in the search bar. For more about search, see Find Tableau CRM Assets and Insights. On the Search page, open the Insights page by clicking **More Insights**. For more about insights, see Ask Data for Salesforce (Beta).



To get the most out of Ask Data for Salesforce, check out the examples in the search bar menu (1). The menu also suggests items from your org's data to complete your question, such as measures, groupings, filters, queries, and datasets (2).

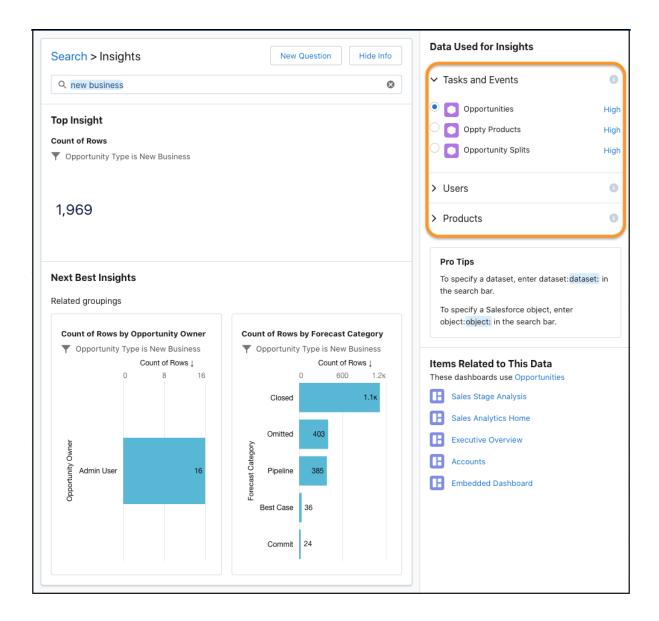
The first time you go to the Search and Insights pages in the Spring '22 release, walkthroughs appear automatically. You can also run the walkthroughs later from the Help menu.



Along with the text of the data query, the Top Insight shows you the filters applied to your question.



The redesigned Data Used for Insights panel shows three groups of datasets. The groups are based on report type clusters associated with common object fields and identified as the best data to answer your question. Each cluster lists the top three datasets with their confidence measures.



SEE ALSO:

Salesforce Help: Ask Data for Salesforce (Beta) (Right-click to view in a new tab or window.)

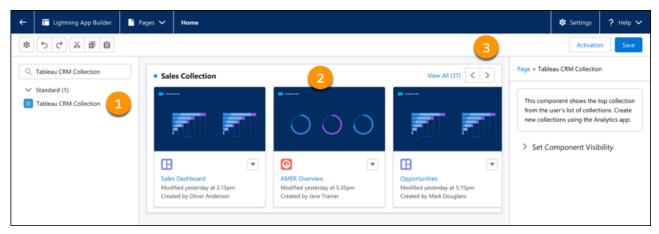
Add Collections Directly to Your Lightning Pages

You can now easily insert and display collections of curated dashboards and lenses in your Lightning pages with the new Tableau CRM Collection component. Drag the Collection component to the canvas, and select a collection. The Collection component intuitively displays the collection in a concise panel, enabling users to view relevant insights in the place where they work.

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: Users must have access to the selected collection used within the component.

How: Open an existing Lightning page or create one in the Lightning App Builder.



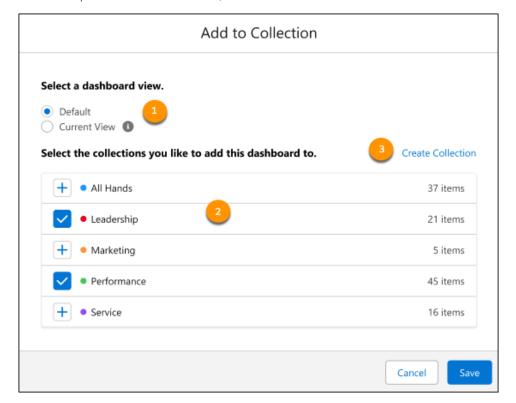
Add the Tableau CRM Collection component (1) to the canvas. The component displays collection dashboards and lenses (2). Use the carousel buttons (3) to navigate through the collection.

Share Dashboard Views Through Collections

In your collections you can now curate and share precise dashboard views that target select users or project teams. When adding Tableau CRM dashboards to a collection, you have the option to add them in their original form or preserve a view with selected filter and dashboard options. Manage how you want your collection dashboards to be seen and enable consistent views for your users.

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 an open Tableau CRM dashboard, click Add to Collection.



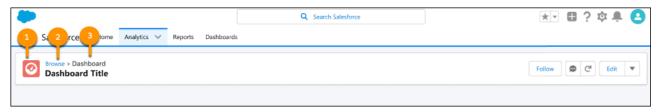
Select the view (1) that you want to add to the collection. Default adds the dashboard in its original form to a collection, Current View adds a view with applied filters. Select a collection (2) to add the dashboard to, or click **Create Collection** (3) to start a new one. Click **Save** when done.

Find Your Way with Navigation Breadcrumbs

Freely explore Analytics and get back to where you want to be using the detailed Analytics navigation breadcrumbs. The location-assisted navigation enables you to go back a step or all the way back home with visual cues and links that guide you along the way.

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: Click any active link in the breadcrumb to go to that page.



Navigation breadcrumb indicates where you are beginning with an **asset type icon** (1), a visual cue representing the opened asset. It's followed by the **source** page (2) where the asset came from, followed by the **asset type** (3) of the asset that's currently open.

Analytics Mobile Apps

Explore lenses and datasets in the Analytics tab in the Salesforce mobile app. Plus, sort tables in dashboards faster by tapping column headers in Tableau CRM for iOS, and save your data explorations as a lens in Tableau CRM for Android.

IN THIS SECTION:

View Lenses and Explore Data in the Salesforce Mobile App

Dive into the details in your data when you're on the go. Now you can explore lenses and datasets in the Analytics tab in the Salesforce mobile app.

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.

View Lenses and Explore Data in the Salesforce Mobile App

Dive into the details in your data when you're on the go. Now you can explore lenses and datasets in the Analytics tab in the Salesforce mobile app.

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



SEE ALSO:

Trailhead: Tableau CRM Mobile Exploration (Right-click to view in a new tab or window.)

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 15.1.
 - Turn detailed data into eye-catching insights with repeater widgets, now on mobile!
 - Read table data faster and more easily with support for text wrapping within tables.
 - Bug fixes.

- New in version 15.0.
 - Support for Spring '22 features, bug fixes, and other usability enhancements.
- 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.

Check out what's new in Tableau CRM for Android.

- New in version 15.1.
 - Bug fixes and usability enhancements.
- New in version 15.0.
 - Support for Spring '22 features, bug fixes, and other usability enhancements.
- 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.

Commerce

Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2B2C Commerce, Commerce Einstein, and Salesforce Order Management.

IN THIS SECTION:

Salesforce B2B and B2B2C Commerce

New functionality for promotions and the ability to bulk import images for products using a CSV file. Import products for a specific B2B store, and view images for products in the product workspace. Adding a single product is easier with a new consolidated add process. When you create a store, several default records for the store are created automatically, simplifying the process of store setup. Manage sorting for search output, configure additional searchable values, and try out the improved Results Layout component for B2C stores.

Commerce Einstein

Commerce Einstein uses AI to automate personalization-related tasks and enhance consumer experiences in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

Salesforce Order Management

Keep your shoppers happy with even exchanges, employ more powerful and robust flows, and safeguard your B2C Commerce storefront against Omnichannel Inventory downtime.

Salesforce B2B and B2B2C Commerce

New functionality for promotions and the ability to bulk import images for products using a CSV file. Import products for a specific B2B store, and view images for products in the product workspace. Adding a single product is easier with a new consolidated add process. When you create a store, several default records for the store are created automatically, simplifying the process of store setup. Manage sorting for search output, configure additional searchable values, and try out the improved Results Layout component for B2C stores.

IN THIS SECTION:

Get Help Faster and Easier

We combined the B2B2C Commerce and B2B Commerce for Lightning Experience Help into one streamlined set of topics that's easier to navigate and search. Most Help topics in the new combined documentation apply to both products. When the information is for just one or the other product, we indicated which product the topic covers in the title. Plus, all topics in the combined Help specify right up front which products the information covers.

Promotions for Your B2B Store

Create new types of commerce promotions in your B2B store. Offer coupons, fixed discounts, and more product promotions per cart.

Import Product Images

When you use a CSV file to bulk import products for a particular B2C or B2B store or globally for all stores, you can also import media. Use the media as the product list image or add up to eight other images for the product detail page.

View Images in the Product Workspace

The Product Workspace includes a new column that displays the list image for a product, if an image is available.

Import Products for a B2B Store

You can do a bulk import to update or add products and related entities for a specific B2B store. Previously, you could import products only at a global level, not for a specific store. You can import up to 2,000 products for a store with the CSV file.

Add Products with Fewer Clicks

The new Add Product workflow consolidates the setup for a new product all in one screen. You no longer have to create a product and travel to separate windows to add related records, such as a price book.

Assign Media to Product Variations

You can now assign images and attachments to product variations. Previously, you could assign media only to the parent product.

Create a Purchase Quantity Rule with a Maximum of 100 Million for B2B Stores

When creating a purchase quantity rule, you can now enter a maximum quantity of up to 100 million. Previously, the maximum quantity was 1 million.

Save Time with Default Records for New Stores

When you create a B2B or B2C store, the new store is assigned default records. You don't have to create and assign these records separately, saving you steps in the store setup process. When you use a CSV file to import data for a store, the imported data is assigned to the default records.

Easily Assign a Catalog and Categories

No more poking around. The categories or catalog tile on the store home page links you to different functionality depending on the status of your store. If a catalog has been assigned to the store, the tile links to the Categories tab for the catalog, where you can manage your categories. If no catalog is assigned to the store, the tile links to the Catalogs window where you can create and assign a catalog for the store.

Configure More Searchable Values

You can now configure up to 70 unique searchable values. Although individually you can configure a maximum of 25 searchable fields, 50 results filters, and 10 sortable fields, the combination can't exceed 70. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70 values.

Manage Sorting for Search Output

Use sort rules to manage how your customers can arrange search results. You can use existing sorting rules, create rules from available products and product attributes, and define how rules appear in the customer-facing sorting menu.

Replace the B2B2C Search Results Component for Improved Search

Salesforce is deprecating the Search Results component in B2B2C storefronts and replacing it with an updated Results Layout component. Update the component to take advantage of enhanced search and layout options for B2B2C Commerce storefronts.

Learn More About Commerce Search Auto-Correction

Auto-correction, or typo tolerance, helps your customers find the products that they're looking for when they inadvertently enter incorrect search terms. A new Salesforce Help topic provides key points and considerations for using Commerce Search, typo tolerance, auto-correction, and Einstein Search suggestions.

Rebuild Search Indexes up to 60 Times per Hour

You can rebuild the search index a combined maximum of 60 times per hour for all storefronts in an org. You must also wait at least 5 minutes between index rebuilds for an individual storefront. However, we strongly recommend rebuilding an index for an individual storefront not more than five times per hour. Rebuilding indexes too quickly or exceeding the org-wide hourly rate limit results in error messages.

Understand Preconfigured Permission Sets

We reorganized B2B and B2B2C Commerce permission set information to make it more accessible. The new organization provides guidance on how to assign permissions and view Commerce permission sets in the org. We also provide a side-to-side comparison of the preconfigured permission sets for B2B and B2B2C storefronts.

Create a Parent-Child Relationship Between Cart Items

Now you can create a lookup relationship from one CartItem record to another CartItem record. Use this method to set up a parent-child hierarchy of items to group them together in a cart.

Order List Component Is More Accessible

You can now use keyboard controls to customize how past orders show to your buyers. If you have existing CSS overrides on the Order List component, make sure that they work as expected.

View Order Summaries for Commerce Stores

Commerce stores introduce a dependency between the CartItem.Name and OrderItem.Description fields, affecting what you see when viewing order summaries.

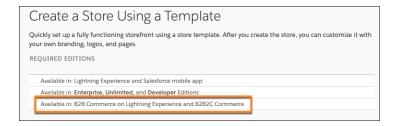
Get Help Faster and Easier

We combined the B2B2C Commerce and B2B Commerce for Lightning Experience Help into one streamlined set of topics that's easier to navigate and search. Most Help topics in the new combined documentation apply to both products. When the information is for just one or the other product, we indicated which product the topic covers in the title. Plus, all topics in the combined Help specify right up front which products the information covers.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Click the new **B2B Commerce and B2B2C Commerce** tile in the Commerce section of Salesforce Help to get all the information you need. We removed the separate B2B Commerce Licenses, B2B Commerce on Lightning Experience, and B2B2C Commerce tiles.

Within each topic, check the table at the beginning to see which products the information covers.



SEE ALSO:

B2B Commerce and B2B2C Commerce Help (Right-click to view in a new tab or window.)

Promotions for Your B2B Store

Create new types of commerce promotions in your B2B store. Offer coupons, fixed discounts, and more product promotions per cart.

IN THIS SECTION:

Create and Share Coupons for Your B2B Store

Boost your business with coupons that buyers can redeem in your online store. Each coupon is connected to a manual promotion with discount, qualifier, and segment rules that you set. A buyer can apply up to two coupons per cart.

Deliver Extra Discounts with More B2B Store Promotions per Cart

We increased the limits on promotions. Your buyers can now have up to 24 item-level promotions and one order-level promotion in their cart. This limit includes a maximum of two manual promotions applied with coupons.

Offer Fixed Discounts on B2B Store Products

What's better for your buyers, 10% off or \$100 off? With new types of promotion adjustments for product and product categories, you can offer your customers a wider variety of discounts. Choose to deduct a fixed amount from either the unit or line item total. Previously, only percentage adjustments were available.

Combine Discounts Under One B2B Store Promotion

Create multiple product discounts for the same promotion. For example, have a sale on all six-pack beverages by creating one promotion with a discount target for each product that matches your criteria.

View All Promotions Applied to an Order

The Order Summary Promotions component on the Order Details page gives buyers the ability to view all promotions and the amount saved for each promotion in one location. Previously, this component showed only order-level promotions. Buyers see the details only when promotions are applied.

Enhance Commerce Promotions with Apex

Now you can use Apex to access the Commerce Promotions API. This update allows developers to more easily incorporate promotions into their customizations.

Promotions Are Manual by Default

New promotions are manual by default so that buyers now use coupons to receive them. Previously, promotions were automatic by default and didn't require a coupon.

Set Decimal Amounts for Promotion Quantities

When you set a quantity minimum, you can now enter a decimal amount up to four places. For example, you can require that a buyer purchase 10.275 units of fabric to qualify for your promotion. Previously, quantity minimums only accepted whole numbers. If you have customizations that are calling promotion APIs, make sure they're working as expected.

Create and Share Coupons for Your B2B Store

Boost your business with coupons that buyers can redeem in your online store. Each coupon is connected to a manual promotion with discount, qualifier, and segment rules that you set. A buyer can apply up to two coupons per cart.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: Create a manual promotion, then navigate to the Coupon tab and click **New**. Add the Coupons component to your store so that buyers can redeem their coupon codes. If you don't see a Coupons related list in your promotion, edit the promotion page layout.

SEE ALSO:

Create Coupons for B2B Stores (Right-click to view in a new tab or window.)

Deliver Extra Discounts with More B2B Store Promotions per Cart

We increased the limits on promotions. Your buyers can now have up to 24 item-level promotions and one order-level promotion in their cart. This limit includes a maximum of two manual promotions applied with coupons.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Create and Manage Promotions for B2B Stores (Right-click to view in a new tab or window.)

Offer Fixed Discounts on B2B Store Products

What's better for your buyers, 10% off or \$100 off? With new types of promotion adjustments for product and product categories, you can offer your customers a wider variety of discounts. Choose to deduct a fixed amount from either the unit or line item total. Previously, only percentage adjustments were available.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: To offer a fixed discount, on the Discounts tab of your promotion, click **Adjustment Type** and select **Fixed Amount Off Unit** or **Fixed Amount Off Line Item Total**. Then enter an adjustment amount.

SEE ALSO:

Define Promotion Discounts for B2B Stores (Right-click to view in a new tab or window.)

Combine Discounts Under One B2B Store Promotion

Create multiple product discounts for the same promotion. For example, have a sale on all six-pack beverages by creating one promotion with a discount target for each product that matches your criteria.

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SEE ALSO:

Define Promotion Discounts for B2B Stores (Right-click to view in a new tab or window.)

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The Order Summary Promotions component on the Order Details page gives buyers the ability to view all promotions and the amount saved for each promotion in one location. Previously, this component showed only order-level promotions. Buyers see the details only when promotions are applied.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Order Summary Promotions(Right-click to view in a new tab or window.)

Enhance Commerce Promotions with Apex

Now you can use Apex to access the Commerce Promotions API. This update allows developers to more easily incorporate promotions into their customizations.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

When: Commerce promotion APIs are accessible with Apex in the Spring '22 release. Apex Reference Guide documentation for commerce promotions will be available in a future release.

SEE ALSO:

Apex Code Overview (Right-click to view in a new tab or window.)

Promotions Are Manual by Default

New promotions are manual by default so that buyers now use coupons to receive them. Previously, promotions were automatic by default and didn't require a coupon.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: To change whether a promotion is manual or automatic, from promotion details, select or deselect **Automatic**. If necessary, to access the Automatic checkbox, adjust the field-level security settings and page layout for the Promotion object.

SEE ALSO:

Create and Manage Promotions for B2B Stores (Right-click to view in a new tab or window.)

Set Decimal Amounts for Promotion Quantities

When you set a quantity minimum, you can now enter a decimal amount up to four places. For example, you can require that a buyer purchase 10.275 units of fabric to qualify for your promotion. Previously, quantity minimums only accepted whole numbers. If you have customizations that are calling promotion APIs, make sure they're working as expected.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Choose What Qualifies for a Promotion for B2B Stores(Right-click to view in a new tab or window.)

Import Product Images

When you use a CSV file to bulk import products for a particular B2C or B2B store or globally for all stores, you can also import media. Use the media as the product list image or add up to eight other images for the product detail page.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: The sample CSV file now includes the new Media columns where you specify the URLs for the images. The external host where the images are stored must be configured as a Content Security Policy (CSP) trusted site in your org.

When you're importing images globally for all stores, specify the CMS workspace that stores the images. If you don't have a CMS workspace, you must create one before using the import process. When you're importing images for a specific store, the import process creates a CMS workspace for you.

SEE ALSO:

Image Import (Right-click to view in a new tab or window.)

CSV File Format for Importing Data Globally (Right-click to view in a new tab or window.)

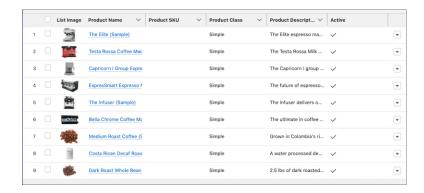
CSV File Format for Importing Data for a Store (Right-click to view in a new tab or window.)

View Images in the Product Workspace

The Product Workspace includes a new column that displays the list image for a product, if an image is available.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select Product Workspace.



SEE ALSO:

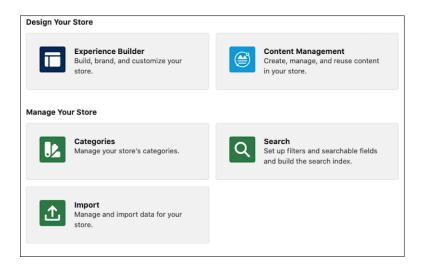
Manage Products in the Product Workspace (Right-click to view in a new tab or window.)

Import Products for a B2B Store

You can do a bulk import to update or add products and related entities for a specific B2B store. Previously, you could import products only at a global level, not for a specific store. You can import up to 2,000 products for a store with the CSV file.

Where: This change applies to B2B Commerce for Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: We provide templates to help you create the CSV file. When your file is ready, from the store home page, click **Import** and follow the instructions.



SEE ALSO:

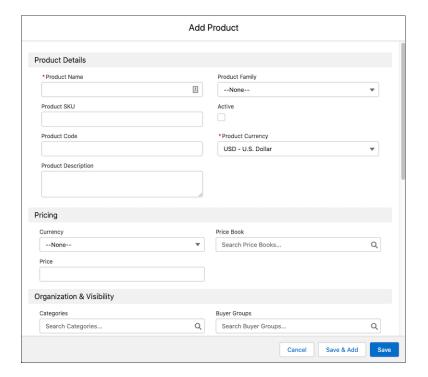
Import Products for a Store Using a CSV File (Right-click to view in a new tab or window.)

Add Products with Fewer Clicks

The new Add Product workflow consolidates the setup for a new product all in one screen. You no longer have to create a product and travel to separate windows to add related records, such as a price book.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To add a product, from the Product Workspace, click **Add**.



SEE ALSO:

Manage Products in the Product Workspace (Right-click to view in a new tab or window.)

Assign Media to Product Variations

You can now assign images and attachments to product variations. Previously, you could assign media only to the parent product.

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

SEE ALSO:

Assign Media to Product Variations(Right-click to view in a new tab or window.)

Create a Purchase Quantity Rule with a Maximum of 100 Million for B2B Stores

When creating a purchase quantity rule, you can now enter a maximum quantity of up to 100 million. Previously, the maximum quantity was 1 million.

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

SEE ALSO:

Create a Purchase Quantity Rule with a Maximum of 100 Million for B2B Stores (Right-click to view in a new tab or window.)

Save Time with Default Records for New Stores

When you create a B2B or B2C store, the new store is assigned default records. You don't have to create and assign these records separately, saving you steps in the store setup process. When you use a CSV file to import data for a store, the imported data is assigned to the default records.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: These default records are created:

- Catalog, with one Products category
- Buyer group
- Entitlement policy
- Store price book and store strikethrough price book

SEE ALSO:

Create a Store Using a Template (Right-click to view in a new tab or window.)

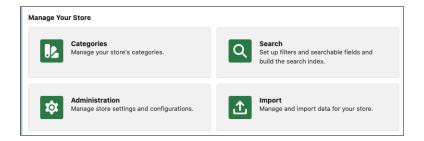
Default Entities for Import to Stores (Right-click to view in a new tab or window.)

Easily Assign a Catalog and Categories

No more poking around. The categories or catalog tile on the store home page links you to different functionality depending on the status of your store. If a catalog has been assigned to the store, the tile links to the Categories tab for the catalog, where you can manage your categories. If no catalog is assigned to the store, the tile links to the Catalogs window where you can create and assign a catalog for the store.

Where: This change applies to B2B Commerce for Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To assign a catalog or category, go to **Manage Your Store** on the home page.



SEE ALSO:

Catalogs for a Store (Right-click to view in a new tab or window.)
Product Categories (Right-click to view in a new tab or window.)

Configure More Searchable Values

You can now configure up to 70 unique searchable values. Although individually you can configure a maximum of 25 searchable fields, 50 results filters, and 10 sortable fields, the combination can't exceed 70. For example, you can configure 20 searchable fields, 40 results filters, and 10 sortable fields, or any combination totaling 70 values.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Mark Product Fields as Searchable (Right-click to view in a new tab or window.)
Add Product Search Filters (Facets) (Right-click to view in a new tab or window.)
Add a Sort Rule (Right-click to view in a new tab or window.)

Manage Sorting for Search Output

Use sort rules to manage how your customers can arrange search results. You can use existing sorting rules, create rules from available products and product attributes, and define how rules appear in the customer-facing sorting menu.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To add and manage sorting rules, access the Search tile for the storefront and click Sort Rules.

SEE ALSO:

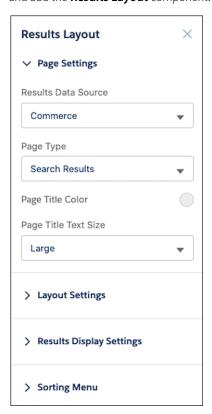
Sort Options (Right-click to view in a new tab or window.)

Replace the B2B2C Search Results Component for Improved Search

Salesforce is deprecating the Search Results component in B2B2C storefronts and replacing it with an updated Results Layout component. Update the component to take advantage of enhanced search and layout options for B2B2C Commerce storefronts.

Where: This change applies to B2B2C Commerce in Enterprise, Performance, Unlimited, and Developer editions.

How: For a new store, click the **Experience Builder** tile. On the Search page or Category page, select the **Results Layout** component. For an existing store, click the **Experience Builder** tile. On the Search page or Category page, remove the **Search Results** component, and add the **Results Layout** component. You can then configure the component and publish your store to deploy your changes.



SEE ALSO:

Results Layout Component for B2C Stores (Right-click to view in a new tab or window.)

Learn More About Commerce Search Auto-Correction

Auto-correction, or typo tolerance, helps your customers find the products that they're looking for when they inadvertently enter incorrect search terms. A new Salesforce Help topic provides key points and considerations for using Commerce Search, typo tolerance, auto-correction, and Einstein Search suggestions.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Commerce Search and Auto-Correction Management (Right-click to view in a new tab or window.)

Rebuild Search Indexes up to 60 Times per Hour

You can rebuild the search index a combined maximum of 60 times per hour for all storefronts in an org. You must also wait at least 5 minutes between index rebuilds for an individual storefront. However, we strongly recommend rebuilding an index for an individual storefront not more than five times per hour. Rebuilding indexes too quickly or exceeding the org-wide hourly rate limit results in error messages.

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

SEE ALSO:

Rebuild the Search Index (Right-click to view in a new tab or window.)

Understand Preconfigured Permission Sets

We reorganized B2B and B2B2C Commerce permission set information to make it more accessible. The new organization provides guidance on how to assign permissions and view Commerce permission sets in the org. We also provide a side-to-side comparison of the preconfigured permission sets for B2B and B2B2C storefronts.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

B2B and B2B2C Commerce Permission Sets (Right-click to view in a new tab or window.)

Create a Parent-Child Relationship Between Cart Items

Now you can create a lookup relationship from one CartItem record to another CartItem record. Use this method to set up a parent-child hierarchy of items to group them together in a cart.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: When you create a Lookup Relationship field, select Cart Item from the related object list.

SEE ALSO:

CartItem (Right-click to view in a new tab or window.)

Object Relationships Overview (Right-click to view in a new tab or window.)

Order List Component Is More Accessible

You can now use keyboard controls to customize how past orders show to your buyers. If you have existing CSS overrides on the Order List component, make sure that they work as expected.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Order List Component for B2B Stores(Right-click to view in a new tab or window.)

View Order Summaries for Commerce Stores

Commerce stores introduce a dependency between the Cartltem. Name and Orderltem. Description fields, affecting what you see when viewing order summaries.

During checkout, Commerce stores create orders and order items for the items in the cart. For each cart item, the Commerce app creates an order item record and copies the value of the cart item's Name field into the corresponding Description field of the order item. The copied field value is the name of a product.

When you view an order summary, the product name copied from the order item's Description field is shown in the summary's Name field.

Review any customizations that write values into the order item's Description field, because your customization can conflict with how Commerce stores are currently using this field. For example, if you overwrite the product name in the Description field with another value, your value, not the product name, is displayed in the order summary page.

Where: This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

OrderItem(Right-click to view in a new tab or window.)

Commerce Einstein

Commerce Einstein uses Al to automate personalization-related tasks and enhance consumer experiences in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

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IN THIS SECTION:

Extend Commerce Einstein Cookie Privacy to Logged-In Shoppers in B2C Stores

To ensure that customer privacy is respected by Commerce Einstein, logged-in customers now opt in using a third-party cookie consent banner before Commerce Einstein can track their data. Previously, only guest customers were required to consent to site activity tracking.

Use Commerce Einstein Recommendations Components Across the B2B2C Shopper Journey

To assist with site configuration and strategic recommendation placement, we added preconfigured Einstein Recommendations components to certain template pages. You can edit or remove these components from pages, or add new recommendation components to existing or custom pages to enhance the shopper journey.

Choose from More Commerce Einstein Recommendation Use Cases in B2C Stores

Broaden your recommendations with these new use cases: Most Viewed By Category, Top Selling By Category, Upsell, Top Selling, and Personalized for Shopper.

Enhance How Commerce Einstein Displays Recommendations in B2C Stores

The Einstein Recommendations component now provides merchants greater control over information presented to shoppers. You can display product text, price information, a quantity selector, and call to action button for products in each recommendation carousel. Display changes are reflected in the carousel representation in Experience Builder.

Enable Commerce Einstein in B2B Stores

You can now deploy Commerce Einstein on B2B storefronts. Previously, Commerce Einstein was enabled by default only for Einstein Search Suggestions. When deployed, Commerce Einstein uses the product catalog, along with buyer Activity Tracking, to generate Einstein Search Suggestions. To enhance the buyer experience, we also added the viewSearch and clickSearch data objects for tracking B2B storefront activities.

SEE ALSO:

Einstein Release Notes

Extend Commerce Einstein Cookie Privacy to Logged-In Shoppers in B2C Stores

To ensure that customer privacy is respected by Commerce Einstein, logged-in customers now opt in using a third-party cookie consent banner before Commerce Einstein can track their data. Previously, only guest customers were required to consent to site activity tracking.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: We recommend that you work with your internal IT teams or consult your implementation partners to identify the right cookie compliance solution for your needs.

Use these guidelines when adding a consent banner to your storefront.

- Ensure that Commerce Einstein is successfully deployed for your site and that storefront activity tracking is enabled.
- Categorize the cgcid cookie in your compliance solution with this information.
 - Host: Your website domain
 - Lifespan: Persistent; 365 days
 - Default Category: Functional Cookies
 - Select a Party: First-Party Cookie
- Enable cookies for your storefront.

From the Commerce App navigation menu, select **Experience Builder**. From Settings, click the **Security & Privacy** tab. In the Site Cookie Usage section, turn on **Allowed Cookies**.

SEE ALSO:

Experience Cloud Cookies (Right-click to view in a new tab or window.)

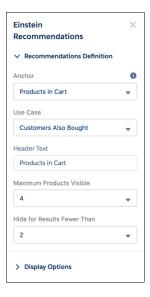
Tracked Data (Right-click to view in a new tab or window.)

Use Commerce Einstein Recommendations Components Across the B2B2C Shopper Journey

To assist with site configuration and strategic recommendation placement, we added preconfigured Einstein Recommendations components to certain template pages. You can edit or remove these components from pages, or add new recommendation components to existing or custom pages to enhance the shopper journey.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select **Experience Builder** and navigate to a page. For existing Einstein Recommendations components, change the component parameters to show the desired recommendations to customers. To add a component, drag it from the Lightning Web Component menu to the page, and then edit the parameters.



SEE ALSO:

Preconfigured Commerce Einstein Recommendations for B2C Stores (Right-click to view in a new tab or window.) Einstein Recommendations Component for B2C Stores (Right-click to view in a new tab or window.)

Choose from More Commerce Einstein Recommendation Use Cases in B2C Stores

Broaden your recommendations with these new use cases: Most Viewed By Category, Top Selling By Category, Upsell, Top Selling, and Personalized for Shopper.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select **Experience Builder**, and navigate to the desired page. Add the Einstein Recommendations component to the page, or select a component already on the page. Select an anchor, and then select the use case.

SEE ALSO:

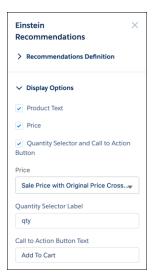
Preconfigured Commerce Einstein Recommendations for B2C Stores (Right-click to view in a new tab or window.) Einstein Recommendations Component for B2C Stores (Right-click to view in a new tab or window.)

Enhance How Commerce Einstein Displays Recommendations in B2C Stores

The Einstein Recommendations component now provides merchants greater control over information presented to shoppers. You can display product text, price information, a quantity selector, and call to action button for products in each recommendation carousel. Display changes are reflected in the carousel representation in Experience Builder.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select **Experience Builder**, and navigate to the desired page. Add an Einstein Recommendations component to the page, or select a component already on the page. Configure the Display Options parameters for the component.



SEE ALSO:

Einstein Recommendations Component for B2C Stores (Right-click to view in a new tab or window.)

Enable Commerce Einstein in B2B Stores

You can now deploy Commerce Einstein on B2B storefronts. Previously, Commerce Einstein was enabled by default only for Einstein Search Suggestions. When deployed, Commerce Einstein uses the product catalog, along with buyer Activity Tracking, to generate Einstein Search Suggestions. To enhance the buyer experience, we also added the viewSearch and clickSearch data objects for tracking B2B storefront activities.

Where: This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select **Administration Workspace**. On the Commerce Einstein tab, enable **Deploy Commerce Einstein**. Turn on Activity Tracking by enabling **Storefront Activity Tracking**.



Note: Commerce Einstein recommendations are currently not supported in B2B stores.

SEE ALSO:

Deploy Commerce Einstein (Right-click to view in a new tab or window.)
Enable Activity Tracking (Right-click to view in a new tab or window.)
Tracked Data (Right-click to view in a new tab or window.)

Salesforce Order Management

Keep your shoppers happy with even exchanges, employ more powerful and robust flows, and safeguard your B2C Commerce storefront against Omnichannel Inventory downtime.

IN THIS SECTION:

Process Even Exchanges for Order Items Before Fulfillment

Keep your shoppers happy with even exchanges for their order items before fulfillment. With the new Even Exchange flow, shoppers can exchange an item for a variant of the same master product, with no financial change to the original order. For example, if a shopper orders a blue size large sweater and then decides that they prefer the same sweater in a red size medium, a service agent can process the exchange.

Enjoy Better Data Integrity in Salesforce Order Management Screen Flows

The Order Management flows now use the Roll Back Records element, which cancels pending record changes when a flow exits due to an error. Previously, when a transaction ended, its pending record changes were saved to the database, even if other parts of the transaction failed. For example, in the Return Item flow, if the Create Credit Memo command failed, the flow didn't generate the corresponding credit memo, and no refund was issued. However, the Order Item Summary was still marked Returned.

Use Actions to Add Order Items and Combine Get Availability and Find Routes

Add order item summaries to an order summary with the new Add Order Item Summary flow core action. Find available inventory and identify the fulfillment routes with the fewest splits for an order summary with the new Find Routes With Fewest Splits Using OCI flow core action. This action combines the existing Omnichannel Inventory Service Get Availability and Find Routes With Fewest Splits actions.

Get Better DOM Routing Flow Performance

The flows in the DOM Routing Flow package now use multithreaded processing with scheduled paths, which improves throughput.

Prepare for and Manage Omnichannel Inventory Downtime

If you use a Salesforce B2C Commerce storefront, the new Inventory Downtime Recovery Playbook helps you design and implement a plan for handling orders while Omnichannel Inventory is unavailable.

Use Change Orders Without Price Books

Change orders are now compatible with the Enable Optional Price Books for Orders order setting.

Process Even Exchanges for Order Items Before Fulfillment

Keep your shoppers happy with even exchanges for their order items before fulfillment. With the new Even Exchange flow, shoppers can exchange an item for a variant of the same master product, with no financial change to the original order. For example, if a shopper orders a blue size large sweater and then decides that they prefer the same sweater in a red size medium, a service agent can process the exchange.

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

Who: The Even Exchange workflow is available to users with a Salesforce Order Management Growth or Plus license. It's compatible only with the B2C Commerce Integration.

How: Configure the standard flows by following the steps in the Salesforce Order Management Implementation Guide. If you use a Salesforce B2C Commerce storefront, go to the Order Management Settings page in Setup. If the B2C Commerce Connection setting is inactive, activate it and configure the trust relationship as described in the Implementation Guide.

SEE ALSO:

Exchange Order Items (Right-click to view in a new tab or window.)

Enjoy Better Data Integrity in Salesforce Order Management Screen Flows

The Order Management flows now use the Roll Back Records element, which cancels pending record changes when a flow exits due to an error. Previously, when a transaction ended, its pending record changes were saved to the database, even if other parts of the transaction failed. For example, in the Return Item flow, if the Create Credit Memo command failed, the flow didn't generate the corresponding credit memo, and no refund was issued. However, the Order Item Summary was still marked Returned.

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

SEE ALSO:

Salesforce Order Management Implementation Guide (Right-click to view in a new tab or window.)

Use Actions to Add Order Items and Combine Get Availability and Find Routes

Add order item summaries to an order summary with the new Add Order Item Summary flow core action. Find available inventory and identify the fulfillment routes with the fewest splits for an order summary with the new Find Routes With Fewest Splits Using OCI flow core action. This action combines the existing Omnichannel Inventory Service Get Availability and Find Routes With Fewest Splits actions.

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

Who: This feature is available to users with a Salesforce Order Management license and Salesforce Omnichannel Inventory.

How: In Flow Builder, drag the **Action** element into your flow. Select the **Order Management** category, and then select an action from the Action list.

Get Better DOM Routing Flow Performance

The flows in the DOM Routing Flow package now use multithreaded processing with scheduled paths, which improves throughput.

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

Prepare for and Manage Omnichannel Inventory Downtime

If you use a Salesforce B2C Commerce storefront, the new Inventory Downtime Recovery Playbook helps you design and implement a plan for handling orders while Omnichannel Inventory is unavailable.

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

Who: This feature is available to users with a Salesforce Order Management license, Salesforce B2C Commerce, and Salesforce Omnichannel Inventory.

How: Deploy the DOM Routing Flows package and follow the instructions in the Inventory Downtime Recovery Playbook.



Note: The playbook uses Apex classes in the flow package, but doesn't require that you use the routing flows.

Use Change Orders Without Price Books

Change orders are now compatible with the Enable Optional Price Books for Orders order setting.

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

When: This functionality became available in Winter '22.

Customization

Get better control over who sees what with enhancements to sharing. Use recently expanded guidance to enable ICU locale formats. View and manage permissions more easily with updates to Salesforce Optimizer and the permission set user assignment experience (Beta).

IN THIS SECTION:

Sharing

Get exciting enhancements to multiple access controls. Mask your users' personal information using Enhanced Personal Information Management. When you use criteria-based sharing rules to give record access, you can now include records owned by high-volume community or system users. Create scoping rules, now generally available, in Setup.

Globalization

Yiddish is available as a platform-only language. The UI for myTrailhead and Workforce Engagement is available in more languages. Use recently expanded guidance to enable the new locale format standard via a release update. We updated the JDK formats for five existing locales and updated the translations for some standard object, tab, and field names.

Permissions

See assignments for the Manage Users permission in the Salesforce Optimizer app. Build Apex tests for permission set groups more easily with a new Apex test method.

External Services

Register more API specs with support for OpenAPI 3.0 schemas. Map custom media types with the External Services Setup UI in addition to authoring External Services metadata.

Lightning App Builder

Improve your slowest running desktop pages with help from a new table in the Lightning Usage App. Add Orchestrator orchestration actions and collections of curated dashboards and lenses to your Lightning pages with new components.

Salesforce Connect

Use the new Salesforce Connect adapter for Amazon DynamoDB (pilot) to integrate AWS data natively with Salesforce business applications. Track your background operations or cancel long-running operations with the Background Operations app.

AppExchange

The AppExchange home page now provides personalized recommendations to help you find the right app or expert more easily.

Sharing

Get exciting enhancements to multiple access controls. Mask your users' personal information using Enhanced Personal Information Management. When you use criteria-based sharing rules to give record access, you can now include records owned by high-volume community or system users. Create scoping rules, now generally available, in Setup.

IN THIS SECTION:

Enable Stronger Protection for Your Users' Personal Information (Release Update)

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users from accessing other users' personal information. This feature, which replaces the Hide Personal Information setting, secures more personal identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This update was first available in Spring '22.

Manage Personal Information Fields via Field Set

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users or guest users, from viewing other users' personal information. When you enable the permission, Salesforce blocks 30 personal information fields using a field set called <code>PersonalInfo_EPIM</code>. Customize the user fields that are concealed by adding or removing them from this field set.

Share High-Volume and System User Records in Criteria Based Sharing Rules

Choose whether to include records owned by high-volume community or system users when you create criteria-based sharing rules.

Use Field Restriction, Restriction, and Scoping Rules in Unlocked Packages

Salesforce now supports field restriction rules, restriction rules, and scoping rules in unlocked packages. Customers with multiple Salesforce orgs can include these rules before creating an unlocked package and installing it in a target environment.

Control the Default Records Your Users See with Scoping Rules (Generally Available)

Based on criteria that you select, you can set the scope of records that your users see. Use a scoping rule to help your users see only the records that are relevant to them. A scoping rule doesn't restrict the record access that your users already have. They can still get to all the records that they have access to per your org's sharing settings.

Use Single Picklists in Restriction and Scoping Rule Criteria

Now when you create a restriction or scoping rule, you can select a single picklist to choose which users this restriction rule applies to. Selecting a picklist offers more flexibility because you can choose custom picklist values as you build rules. Single picklists are supported in rule criteria in Salesforce or via an API, but multi-select picklists aren't.

Enable Stronger Protection for Your Users' Personal Information (Release Update)

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users from accessing other users' personal information. This feature, which replaces the Hide Personal Information setting, secures more personal identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This update was first available in Spring '22.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer 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: From Setup, in the Quick Find box, enter *User Management Settings*, and then select **User Management Settings**. If Hide Personal Information is enabled, deselect it. Enable **Enhanced Personal Information Management**.

To customize the user fields that are concealed, add them to a field set.

To review this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Enable Stronger Protection for Your Users' Personal Information, follow the testing and activation steps.



Note: When you enable Enhanced Personal Information Management, guest users lose access to their own PII fields. For example, quest users can't see their own email information.

SEE ALSO:

Salesforce Help: Create a Restriction Rule (Right-click to view in a new tab or window.)

Salesforce Help: Manage Personal User Information Visibility for External Users (Right-click to view in a new tab or window.)

Release Updates

Manage Personal Information Fields via Field Set

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users or guest users, from viewing other users' personal information. When you enable the permission, Salesforce blocks 30 personal information fields using a field set called <code>PersonalInfo_EPIM</code>. Customize the user fields that are concealed by adding or removing them from this field set.

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

SEE ALSO:

Secure Personal Information Fields from External and Guest Users via Field Set

Salesforce Help: Manage Personal User Information Visibility for External Users (Right-click to view in a new tab or window.)

Salesforce Help: Personal User Information Considerations (Right-click to view in a new tab or window.)

Salesforce Help: About Field Sets (Right-click to view in a new tab or window.)

Salesforce Help: Creating and Editing Field Sets (Right-click to view in a new tab or window.)

Share High-Volume and System User Records in Criteria Based Sharing Rules

Choose whether to include records owned by high-volume community or system users when you create criteria-based sharing rules.

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

SEE ALSO:

Grant Access to HVU or System User Records in Criteria-Based Sharing Rules

IdeaExchange: Automated Case User = System**: System User invisible to Sharing rules

Use Field Restriction, Restriction, and Scoping Rules in Unlocked Packages

Salesforce now supports field restriction rules, restriction rules, and scoping rules in unlocked packages. Customers with multiple Salesforce orgs can include these rules before creating an unlocked package and installing it in a target environment.

Where: This change applies to unlocked packages.

SEE ALSO:

Include Field Restriction, Restriction, and Scoping Rules in Unlocked Packages

Control the Default Records Your Users See with Scoping Rules (Generally Available)

Based on criteria that you select, you can set the scope of records that your users see. Use a scoping rule to help your users see only the records that are relevant to them. A scoping rule doesn't restrict the record access that your users already have. They can still get to all the records that they have access to per your org's sharing settings.

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

Who: Any partner, ISV, or customer can test scoping rules using a Developer Edition org. Scoping rules are available to customers using Unlimited Edition with Signature or Premier Priority Support. This feature is available only to customers who have purchased professional services, specifically Implementation Architect, Program Architect, or Technical Account Manager.

How: Scoping rules are available for custom objects and these standard objects.

- Account
- Case

- Contact
- Event
- Lead
- Opportunity
- Task



Note: Scoping rules don't support PersonAccount fields.

For information on enabling this feature, contact Salesforce Customer Support. To create a scoping rule, navigate to Object Manager in Setup. Select the object that you want to add a scoping rule for. Click **Scoping Rules**. You can also create and modify scoping rules using Tooling or Metadata API.

SEE ALSO:

Developer Guide: Scoping Rules (Right-click to view in a new tab or window.) Salesforce Help: Scoping Rules (Right-click to view in a new tab or window.) IdeaExchange: Enable Divisions in Lightning for Accounts (partially delivered)

Use Single Picklists in Restriction and Scoping Rule Criteria

Now when you create a restriction or scoping rule, you can select a single picklist to choose which users this restriction rule applies to. Selecting a picklist offers more flexibility because you can choose custom picklist values as you build rules. Single picklists are supported in rule criteria in Salesforce or via an API, but multi-select picklists aren't.

Where: Restriction rules are available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Scoping rules are available to customers using Unlimited Edition with Signature or Premier Priority Support.

How: To use a picklist in your rule's user criteria, navigate to Object Manager in Setup. Select the object that you want to add a rule to. Click **Restriction Rules** or **Scoping Rules**. Name and describe the rule, and activate it. Select a picklist as the type field in user criteria, and choose a picklist value to determine which users the rule applies to.

SEE ALSO:

Salesforce Help: Create a Restriction Rule (Right-click to view in a new tab or window.)

Salesforce Help: Create a Custom Picklist Field (Right-click to view in a new tab or window.)

IdeaExchange: More configurable Restriction Rules (support more field types, e.g. picklists) (partially delivered)

Globalization

Yiddish is available as a platform-only language. The UI for myTrailhead and Workforce Engagement is available in more languages. Use recently expanded guidance to enable the new locale format standard via a release update. We updated the JDK formats for five existing locales and updated the translations for some standard object, tab, and field names.

IN THIS SECTION:

Enable ICU Locale Formats (Release Update)

To conduct 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.

Connect with Customers Who Speak and Read Yiddish

Yiddish is now available as a platform-only language, and users can select the new Yiddish (United States) locale.

Use myTrailhead and Workforce Engagement Management in More Languages

To make myTrailhead and Workforce Engagement Management more accessible to your users around the globe, the UI for those products is available in more languages. The myTrailhead UI is now available in Chinese (Simplified) and Korean. The Workforce Engagement Management UI is now available in all Salesforce end-user languages except for Arabic and Hebrew.

Review Updated Term Translations

To improve accuracy and your user experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Bulgarian, Chinese (Simplified), Czech, Dutch, Finnish, French, Greek, Japanese, Korean, Portuguese (European), Romanian, Swedish, Ukrainian, and Vietnamese.

Prepare for Updated JDK Locale Formats

To provide you with up-to-date formats, we updated the Java Development Kit (JDK) date and time formats for five Serbian and Montenegrin locales. We recommend that you evaluate how these format changes affect you and test your filters, code, and components as needed.

Enable ICU Locale Formats (Release Update)

To conduct 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 mobile 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.

How: To determine how this change affects your org and learn about the updates required to support the new formats, see the recently expanded guidance 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 <code>User Interface</code>, and select <code>User Interface</code>, and select <code>User Interface</code>. Then select <code>Enable ICU</code> formats for en_CA locale, and save your changes.

SEE ALSO:

Salesforce Help: Go Global with New International Locale Formats (Right-click to view in a new tab or window.) Release Updates

Connect with Customers Who Speak and Read Yiddish

Yiddish is now available as a platform-only language, and users can select the new Yiddish (United States) locale.

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

SEE ALSO:

Salesforce Help: Supported Languages (Right-click to view in a new tab or window.)
Salesforce Help: Select Your Language, Locale, and Currency (Right-click to view in a new tab or window.)

Use myTrailhead and Workforce Engagement Management in More Languages

To make myTrailhead and Workforce Engagement Management more accessible to your users around the globe, the UI for those products is available in more languages. The myTrailhead UI is now available in Chinese (Simplified) and Korean. The Workforce Engagement Management UI is now available in all Salesforce end-user languages except for Arabic and Hebrew.

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

SEE ALSO:

Salesforce Help: User Interface Language Support (Right-click to view in a new tab or window.)

Review Updated Term Translations

To improve accuracy and your user experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Bulgarian, Chinese (Simplified), Czech, Dutch, Finnish, French, Greek, Japanese, Korean, Portuguese (European), Romanian, Swedish, Ukrainian, and Vietnamese.

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

How: To review the changes, see the knowledge article, Review Spring '22 Updated Label Translations, and download the attached list of changes.

To use a different translation for a tab or field label, 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 (Right-click to view in a new tab or window.)

Prepare for Updated JDK Locale Formats

To provide you with up-to-date formats, we updated the Java Development Kit (JDK) date and time formats for five Serbian and Montenegrin locales. We recommend that you evaluate how these format changes affect you and test your filters, code, and components as needed.

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

SEE ALSO:

Knowledge Article: Java Development Kit (JDK) Locale Format Changes in Spring '22

Salesforce Help: Determine Whether Your Org Uses ICU or JDK Locale Formats (Right-click to view in a new tab or window.)

Salesforce Help: Determine the Locales in Use (Right-click to view in a new tab or window.)

Permissions

See assignments for the Manage Users permission in the Salesforce Optimizer app. Build Apex tests for permission set groups more easily with a new Apex test method.

IN THIS SECTION:

Test Permission Set Groups with the calculatePermissionSetGroup() Method

Modify and recalculate permission set groups in Apex tests using the calculatePermissionSetGroup() method in the System. Test class. With this method you can force a calculation of aggregate permissions on a permission set group (PermissionSetGroup object) during a deployment.

View Improved Critical Permissions Assignments for Manage Users in Optimizer

The updated Salesforce Optimizer better captures the critical permissions assignments that you monitor. Assignments for the Manage Users permission now appear in Critical Permissions Assignments instead of assignments for the View All Users permission. Rerun the Salesforce Optimizer app to see the updated metric in Critical Permissions Assignments.

Manage Permission Sets and Permission Set Group Assignment Expiration Dates with an Enhanced User Experience (Beta)

Now it's easier to search for and filter users to assign to permission sets and permission set groups. And with Lightning list views, you can better manage expiration dates for those permissions.

Create Expanded Transaction Security Policies for Permission Set Events (Beta)

Monitor more changes to permission sets and permission set groups using transaction security policies in Event Monitoring. These new transaction security policies enable you to block permission changes in permission sets and permission set groups that don't comply with internal usage, compliance, or security policies. You can also send notifications to admins when changes don't comply with those same policies.

Test Permission Set Groups with the calculatePermissionSetGroup() Method

Modify and recalculate permission set groups in Apex tests using the calculatePermissionSetGroup() method in the System. Test class. With this method you can force a calculation of aggregate permissions on a permission set group (PermissionSetGroup object) during a deployment.

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

Why: Permission set group calculations for aggregate permissions are performed after changes are committed. Previously, there was no option to force an immediate calculation of permissions. You weren't able to easily test permission set groups during deployment as part of an Apex test.

How: The calculatePermissionSetGroup () method can require complex data setup, and each forced recalculation counts against Apex CPU limits. To minimize the number of times you perform this operation in tests, set it to run once in a @testSetup method, and then reuse the resulting data.

View Improved Critical Permissions Assignments for Manage Users in Optimizer

The updated Salesforce Optimizer better captures the critical permissions assignments that you monitor. Assignments for the Manage Users permission now appear in Critical Permissions Assignments instead of assignments for the View All Users permission. Rerun the Salesforce Optimizer app to see the updated metric in Critical Permissions Assignments.

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

Manage Permission Sets and Permission Set Group Assignment Expiration Dates with an Enhanced User Experience (Beta)

Now it's easier to search for and filter users to assign to permission sets and permission set groups. And with Lightning list views, you can better manage expiration dates for those permissions.

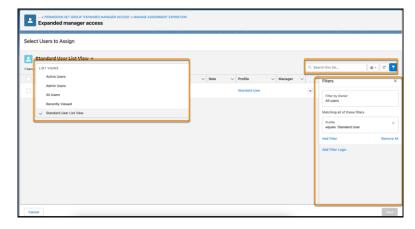
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.



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: For example, a team at your head office evaluates sales contract language for a project that has an end date. Create a filter for the users based on their location, assign them to the permission set group, and then set the expiration date as the project's end.

How: From User Management Settings, enable **Permission Set Group Assignments with Expiration Dates (beta)**. Then, from either the Permission Set Group or Permission Set page, click **Manage Assignment Expiration**. On the Current Assignments page, you can view permission set or permission set group users. To create a user assignment, click **Add Assignment**. On the Add Assignment page, you can search for and filter users.



SEE ALSO:

Salesforce Help: Permission Set and Permission Set Group Assignment Expiration (Beta) (Right-click to view in a new tab or window.)

Salesforce Help: Set Assignment Expiration Details for Users in Permission Sets and Permission Set Groups (Beta) (Right-click to view in a new tab or window.)

Create Expanded Transaction Security Policies for Permission Set Events (Beta)

Monitor more changes to permission sets and permission set groups using transaction security policies in Event Monitoring. These new transaction security policies enable you to block permission changes in permission sets and permission set groups that don't comply with internal usage, compliance, or security policies. You can also send notifications to admins when changes don't comply with those same policies.

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



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

SEE ALSO:

Monitor Changes to Permission Sets and Permission Set Groups (Beta)

External Services

Register more API specs with support for OpenAPI 3.0 schemas. Map custom media types with the External Services Setup UI in addition to authoring External Services metadata.

IN THIS SECTION:

Register More Specs with OpenAPI 3.0 Support

You can register even more complex, publicly available API specifications. Register schemas that use OpenAPI 3.0 JSON format.

Include More Operations with Composition and Polymorphism Support

Use composition and polymorphism components allOf, anyOf, oneOf, and Discriminator.

Map Unsupported Media Types in Your Registration

When you register a schema that includes nonsupported media types, you must map each nonsupported, custom media type instance to a supported media type of the same format. Now you can specify a mapping from a dropdown menu on the registration screen. Previously, you provided the mapping with code by using Metadata API.

Access External Services Actions in Flow as a Guest User

Community guest users now can run flows that contain External Services actions if they have access to the flow in Experience Builder. Previously, Community guest users couldn't get that access, and you opened a support case to request it for them.

MIME Type Is Changed to Media Type in External Services Help

MIME type is now called media type in Salesforce Help.

Register More Specs with OpenAPI 3.0 Support

You can register even more complex, publicly available API specifications. Register schemas that use OpenAPI 3.0 JSON format.

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

SEE ALSO:

Salesforce Help: External Services Considerations (Right-click to view in a new tab or window.)

External Link: OpenAPI Specification (Swagger)

External Link: External Services OpenAPI 3.0 Support

Include More Operations with Composition and Polymorphism Support

Use composition and polymorphism components allOf, anyOf, oneOf, and Discriminator.

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

How: Schema construct support includes these composition and polymorphism components.

- allOf
 - In OpenAPI 2.0 and OpenAPI 3.0, validates the value against all subschemas
- anyOf
 - In OpenAPI 3.0, validates the value against any (one or more) of subschemas
- oneOf
 - In OpenAPI 3.0, validates the value against exactly one of subschemas.
- Discriminator
 - Helps locate the validating subschema in the composition by constraining which schemas are semantically valid. You can use
 the discriminator object with allOf, anyOf, or oneOf. The OpenAPI 3.0 discriminator mapping directive
 is ignored.

SEE ALSO:

Salesforce Help: External Services Considerations (Right-click to view in a new tab or window.) External Link: OpenAPI Specification (Swagger)

Map Unsupported Media Types in Your Registration

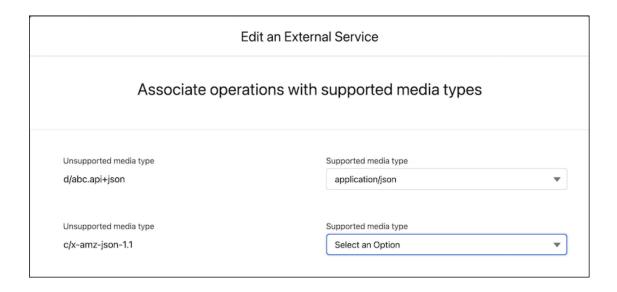
When you register a schema that includes nonsupported media types, you must map each nonsupported, custom media type instance to a supported media type of the same format. Now you can specify a mapping from a dropdown menu on the registration screen. Previously, you provided the mapping with code by using Metadata API.

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

How: Supported media types are:

- application/json Structured data in JSON format.
- text/plain Unstructured data as plain text.
- application/x-www-form-urlencoded URL-encoded form.

If your schema includes nonsupported media types, you see the Associate operations with supported media types page. There you can select a valid mapping for each nonsupported type. The screen doesn't appear during registration unless there's a nonsupported media type specified in the schema.



Custom media types with a supported media type suffix are recognized as one of the compatible supported media types. For example, a custom or vendor media type application/vnd.api+json with media type suffix json is recognized as application/json.

Supported media type suffixes:

• json — Structured data in JSON format.

SEE ALSO:

Salesforce Help: Media Type Mapping in External Service Registrations (Right-click to view in a new tab or window.) External Link: Do Not Default Mime Types for External Services

Access External Services Actions in Flow as a Guest User

Community guest users now can run flows that contain External Services actions if they have access to the flow in Experience Builder. Previously, Community guest users couldn't get that access, and you opened a support case to request it for them.

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

SEE ALSO:

Salesforce Help: Allow Guest Users to Access Flows (Right-click to view in a new tab or window.)

MIME Type Is Changed to Media Type in External Services Help

MIME type is now called media type in Salesforce Help.

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

SEE ALSO:

Salesforce Help: Media Type Mapping in External Service Registrations (Right-click to view in a new tab or window.)

Lightning App Builder

Improve your slowest running desktop pages with help from a new table in the Lightning Usage App. Add Orchestrator orchestration actions and collections of curated dashboards and lenses to your Lightning pages with new components.

IN THIS SECTION:

Monitor Your Slowest Desktop Record Pages

Discover which pages are taking too long to load. A new prompt in the Lightning App Builder takes you to the Lightning Usage App, which lists the desktop record pages with a median estimated performance time (EPT) of 4 seconds or longer.

Use Orchestrator Work Guide to Connect Users with Tasks (Generally Available)

The new Orchestrator Work Guide component displays actions generated by Orchestrator orchestrations to assigned users. This component, now generally available, includes some changes since the last release.

Bring in Analytics Assets to Your Lightning Page

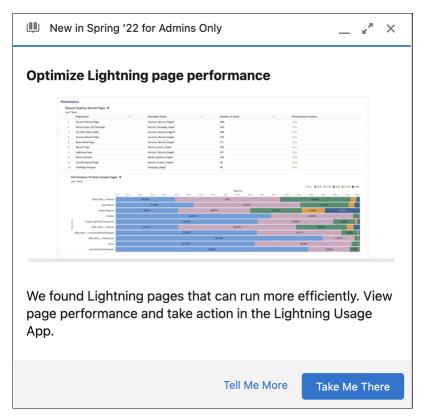
Use the new Tableau CRM Collection component to add collections of curated dashboards and lenses to your Lightning pages. The collection component intuitively displays your collection in a concise panel, enabling users to scroll through all its contents.

Monitor Your Slowest Desktop Record Pages

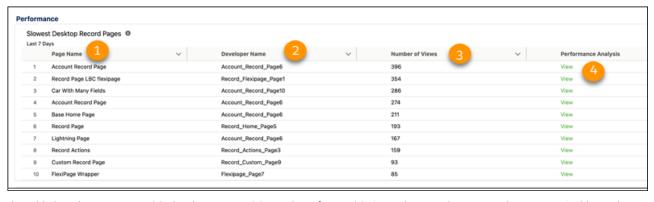
Discover which pages are taking too long to load. A new prompt in the Lightning App Builder takes you to the Lightning Usage App, which lists the desktop record pages with a median estimated performance time (EPT) of 4 seconds or longer.

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

Why: If you're working in Lightning App Builder and have slow desktop record pages, a one-time prompt directs you to the Lightning Usage App table.



Improve the user experience by finding out which pages need tweaking.



The table lists the page name (1), developer name (2), number of views (3). Open the record page in Lightning App Builder and view the Record Page Performance Analysis results (4).

SEE ALSO:

Salesforce Help: Lightning Page Performance (Right-click to view in a new tab or window.)
Salesforce Help: What Is EPT? (Right-click to view in a new tab or window.)

Use Orchestrator Work Guide to Connect Users with Tasks (Generally Available)

The new Orchestrator Work Guide component displays actions generated by Orchestrator orchestrations to assigned users. This component, now generally available, includes some changes since the last release.

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

SEE ALSO:

Increase Productivity with Orchestrator Work Guide

Bring in Analytics Assets to Your Lightning Page

Use the new Tableau CRM Collection component to add collections of curated dashboards and lenses to your Lightning pages. The collection component intuitively displays your collection in a concise panel, enabling users to scroll through all its contents.

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

Who: A Tableau CRM license is required to use Tableau CRM.

SEE ALSO:

Add Collections Directly to Your Lightning Pages

Salesforce Connect

Use the new Salesforce Connect adapter for Amazon DynamoDB (pilot) to integrate AWS data natively with Salesforce business applications. Track your background operations or cancel long-running operations with the Background Operations app.

IN THIS SECTION:

Securely Connect Data Across Amazon DynamoDB and Salesforce (Pilot)

Use the new Salesforce Connect adapter for Amazon DynamoDB to seamlessly and quickly integrate AWS data natively with Salesforce business applications. You can connect DynamoDB data sources to Salesforce through external objects and take advantage of the Salesforce Platform capabilities.

Monitor Your Background Operations

Use the new Background Operations app to track your background operations or cancel long-running operations that are stuck in an asynchronous job queue. You can view the operations to which you have Read access. You can only cancel those operations to which you have Update access.

Securely Connect Data Across Amazon DynamoDB and Salesforce (Pilot)

Use the new Salesforce Connect adapter for Amazon DynamoDB to seamlessly and quickly integrate AWS data natively with Salesforce business applications. You can connect DynamoDB data sources to Salesforce through external objects and take advantage of the Salesforce Platform capabilities.

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



Note: Salesforce Connect adapter for Amazon DynamoDB 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: Get a 360-degree view of your customer data using the Salesforce Connect adapter for Amazon DynamoDB.

View and edit data with record pages, related lists, and limited support for list views.

- Define object relationships for data captured in either single-table or multi-table design patterns.
- Use Reports and Dashboards with external objects defined for DynamoDB data.
- Access DynamoDB data mapped to external objects programmatically via SOQL, SOSL, and Apex, including DML.

How: Use the Amazon DynamoDB type to define an external data source and connect your Salesforce org to data that's stored in DynamoDB. For more information, see Work with External Data Sources.

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

Monitor Your Background Operations

Use the new Background Operations app to track your background operations or cancel long-running operations that are stuck in an asynchronous job queue. You can view the operations to which you have Read access. You can only cancel those operations to which you have Update access.

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

How: From the App Launcher, find and select **Background Operations**. Create a custom list to see background operations that you have access to. To review the operation details, find and click the background operation name. To stop a stuck operation, click **Cancel**.

SEE ALSO:

SOAP API Developer Guide: BackgroundOperation (Right-click to view in a new tab or window.)

AppExchange

The AppExchange home page now provides personalized recommendations to help you find the right app or expert more easily.

IN THIS SECTION:

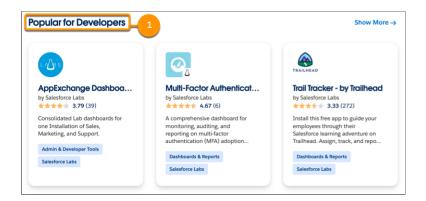
Find Relevant AppExchange Apps and Experts with Ease

The new, smarter AppExchange home page offers personalized recommendations, trending apps, and more in a modern, easy-to-browse feed. Explore recommendations tailored to your job role, industry, and Salesforce products. Quickly determine which apps meet your company's needs with simplified tiles and other look-and-feel enhancements.

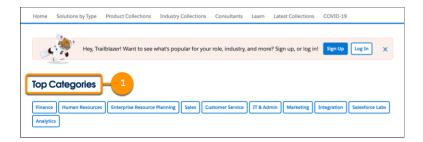
Find Relevant AppExchange Apps and Experts with Ease

The new, smarter AppExchange home page offers personalized recommendations, trending apps, and more in a modern, easy-to-browse feed. Explore recommendations tailored to your job role, industry, and Salesforce products. Quickly determine which apps meet your company's needs with simplified tiles and other look-and-feel enhancements.

Why: The new AppExchange home page's personalization and intuitive design help you discover the right app or expert with fewer clicks.



Now, you can explore recommendations directly on the home page. We also provide recommendations based on your profile (1). Previously, we showed recommendations for apps and experts on the Recommended for You tab.



The new home page also includes interface improvements to help you browse more efficiently. Popular marketplace categories are quickly accessed from the top of the page (1). Listing tiles are simplified and no longer require you to hover to see key app details.

How: Go to Trailblazer.me, and make sure that your profile is up to date. Then, visit AppExchange, and log in to explore your personalized home page.

Deployment

Install the updated Spring '22 Ant Migration Tool to use the latest stable library versions.

Ant Migration Tool

Use the updated Spring '22 Ant Migration Tool

To use the latest stable versions of the libraries used by the Ant Migration Tool, download and install the updated Spring '22 version. If you installed the Spring '22 version of the Ant Migration Tool before February 17, 2022, download and install the tool again.

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

Use UI Test Automation Model and its Page Object model to write robust UI tests for any web page with your preferred tooling and test automation framework. Enable easier global styling and third-party integrations for Lightning web components by using light DOM, where your component markup is attached to the host element instead of its shadow tree. Use Lightning Web Runtime to create standalone Lightning Web Components applications while using your preferred tooling and code. Lightning Web Security, the client-side security architecture for strong, flexible security for your custom Lightning web components, is generally available.

Einstein Vision

Einstein OCR support for handwritten text is now available for images and PDFs (beta). Use the power of Artificial Intelligence (AI) to add personalization to documents.

Einstein Platform

Custom fields with the ___pc suffix are Person Account custom fields on the Contact object and aren't supported for Einstein predictions. The AlApplication API doesn't support the delete() call. The Einstein Platform Alapplication API packaging information is added to the list of components available in managed packages.

Visualforce

Increase security of your Visualforce pages by reviewing and enabling the release updates.

Apex

Get hostnames for the domains that Salesforce hosts for your org. Use DataWeave in Apex (pilot) to enable data transformation to different formats. Find Apex classes that directly or indirectly implement an interface. Experience reduced minimum time between queueable jobs.

API

Legacy API Versions 7.0 Through 20.0 will be retired in Summer '22.

Packaging

Removing metadata components from second-generation managed packages is generally available. We enhanced the experience of working with package ancestors. And we're enforcing multi-factor authentication for logins to subscriber orgs.

Sandboxes

We updated 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. Use Performance Assistant for scalability and performance testing.

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 language flexibility.

AppExchange Partners

Analyze org, package, and custom entity metadata with AppExchange App Analytics subscriber snapshots.

Change Data Capture

Receive change notifications for more objects.

Platform Events

Filter platform event streams with channels (beta), and send event messages to Amazon EventBridge with Event Bus Relay (pilot).

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

Use UI Test Automation Model and its Page Object model to write robust UI tests for any web page with your preferred tooling and test automation framework. Enable easier global styling and third-party integrations for Lightning web components by using light DOM, where your component markup is attached to the host element instead of its shadow tree. Use Lightning Web Runtime to create standalone Lightning Web Components applications while using your preferred tooling and code. Lightning Web Security, the client-side security architecture for strong, flexible security for your custom Lightning web components, is generally available.



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:

Write More Robust UI Tests with UTAM (Generally Available)

UI Test Automation Model (UTAM) is based on the popular Page Object design pattern commonly used in UI tests. When a web application, such as Salesforce, changes, the DOM of the pages and components in the app also change. Using JSON page objects makes your tests more robust and reduces test maintenance time every time an application UI changes. Because UTAM moves test logic into JSON page objects, you can handle many changes by updating your page objects rather than test code. It's much less effort to update the JSON page object for a changed component than it is to rewrite complicated UI automation tests.

Enable Third-Party Integrations with Light DOM (Beta)

Lightning web components render in shadow DOM by default, providing strong encapsulation but posing challenges for global styling and many third-party integrations. With light DOM, your component markup is attached to the host element instead of its shadow tree. You can then access it like any other content in the document host.

Create Web Apps with Lightning Web Runtime on Node.js (Developer Preview)

From static websites to single-page applications, Lightning Web Runtime (LWR) makes web development fast, secure, and standards-based. With LWR you can create standalone Lightning Web Components (LWC) applications while using your preferred tooling and code. And you get the high performance that comes from page generation at build time, not runtime.

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

Lightning Web Security (LWS) is a new client-side security architecture for your Lightning web components. The 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. This feature, now generally available, includes some changes since the beta release.

Enablement of Lightning Web Security Begins

Salesforce plans to enable the Lightning Web Security (LWS) org setting on a rolling basis in production orgs that have *only* Lightning web components. If your org also has Aura components, or has no components, Lightning Web Security won't be enabled in Spring '22.

Ensure That Your Code Works in Lightning Web Security with New Tools

Try our new developer tools to ensure that your Lightning web component's JavaScript code works with Lightning Web Security (LWS).

Invalid HTML Syntax Results in Warnings

Warnings are displayed in the web console for invalid HTML syntax found in LWC markup.

Customize Your Datatable with New Features

Enhance user interaction with your datatables. Programmatically change a focused field to edit mode from an external element such as a button. Display a lock icon on fields that can't be edited. Use an icon as a column header without a column label. Give a column a unique ID to enable a field name to be used in multiple columns.

Scan a Barcode in a Lightning Web Component (Generally Available)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning web components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way! This feature, now generally available, improves quality since the beta release.

Use Location in a Lightning Web Component

Location is fundamental to mobile apps. Use the LocationService API to add location-based features to your Lightning web components. Get the current location and location updates within Lightning web components running on a mobile device. Show the current position on a map, provide directions, save the location when creating or updating a record, and otherwise add location awareness to your LWC apps.

Lightning Components Release Updates

We're enforcing the Enforce CORS Allowlist for Lightning Apps release update.

SEE ALSO:

Lightning Web Components Developer Guide Lightning Aura Components Developer Guide

Write More Robust UI Tests with UTAM (Generally Available)

UI Test Automation Model (UTAM) is based on the popular Page Object design pattern commonly used in UI tests. When a web application, such as Salesforce, changes, the DOM of the pages and components in the app also change. Using JSON page objects makes your tests more robust and reduces test maintenance time every time an application UI changes. Because UTAM moves test logic into JSON page objects, you can handle many changes by updating your page objects rather than test code. It's much less effort to update the JSON page object for a changed component than it is to rewrite complicated UI automation tests.

Where: You can use UTAM to test any web page using your preferred tooling and test automation framework. UTAM is ideally suited to write JavaScript or Java UI tests for Lightning web components in Lightning Experience.

How: Author a UTAM page object in JSON by using an easy-to-understand grammar. The UTAM compiler transforms the JSON page objects into JavaScript and Java page objects that you use in your tests.

UTAM is agnostic to the application under test, and you can use it beyond the Salesforce platform.

UTAM doesn't include a test runner, but you can integrate it with any test automation framework. For JavaScript tests, UTAM provides an adapter between UTAM page objects and the browser API that WebdriverlO provides. For Java tests, UTAM provides an integration with Selenium for Java.

To learn more, see utam.dev. The Get Started page links to recipes repos that contain JavaScript and Java tests and details on how to deploy to scratch orgs.

Enable Third-Party Integrations with Light DOM (Beta)

Lightning web components render in shadow DOM by default, providing strong encapsulation but posing challenges for global styling and many third-party integrations. With light DOM, your component markup is attached to the host element instead of its shadow tree. You can then access it like any other content in the document host.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components open source.



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: Light DOM allows third-party tools to traverse the DOM, enabling standard browser query APIs like querySelector and querySelectorAll, without traversing the shadow root. It also facilitates global styling so you can apply custom branding to your components and child components easily.

How: To enable a component to render in light DOM, set the renderMode static field in your component class.

```
import { LightningElement } from 'lwc';
export default class LightDomApp extends LightningElement {
    static renderMode = 'light'; // the default is 'shadow'
```

Use the lwc:render-mode template directive on the <template> tag of your component.

```
<template lwc:render-mode='light'>
   <my-header>
       Hello World
   </my-header>
</template>
```

When you enable light DOM on a component, it no longer renders its elements in the #shadow-root tree.

```
<my-app>
   <my-header>
       Hello World
   </my-header>
</my-app>
```

A light DOM component can contain a shadow DOM component. Similarly, a shadow DOM component can contain a light DOM component. However, base Lightning components always render in shadow DOM. Restricting light DOM to specific namespaces isn't supported.

(1) Important: We don't recommend using light DOM if you're working with sensitive data. Using light DOM exposes your components to DOM scraping. You don't get the benefits that come with shadow DOM encapsulation, which prevents unauthorized access into the shadow tree.

LWC doesn't scope styles automatically for you. To implement style encapsulation on a light DOM component, use a *.scoped.css file, which applies CSS to elements on the component only.

```
myCmp
      -myCmp.html
      -myCmp.css
      -myCmp.scoped.css
```

If you use both *.css and *.scoped.css files, the *.css style sheets are injected before the *.scoped.css style sheets. The scoped style CSS selectors have precedence over the unscoped ones because they're declared last.

Let's look at a light DOM component with unscoped and scoped styles.

```
<!-- c-light-cmp -->
<template lwc:render-mode="light">
```

In this case, c-light-cmp uses the scoped styles, but the styles from the unscoped style sheet can bleed out of the component.

SEE ALSO:

Lightning Web Components Developer Guide: Light DOM

Track Events on LWR Sites in Standard Components Enabled with Light DOM

Create Web Apps with Lightning Web Runtime on Node.js (Developer Preview)

From static websites to single-page applications, Lightning Web Runtime (LWR) makes web development fast, secure, and standards-based. With LWR you can create standalone Lightning Web Components (LWC) applications while using your preferred tooling and code. And you get the high performance that comes from page generation at build time, not runtime.

Where: Lightning Web Runtime (Developer Preview) on Node.js is available via the npm Registry.



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.

Why: LWR gives you control and flexibility when building a website or LWC application. LWR is a non-opinionated way to configure and load the modules, services, and dependency providers for a JavaScript app. Because of this flexible model, you can deploy on runtime environments ranging from a local Node.js runtime to a standalone instance in Heroku.

If you prefer not to manage your own LWR-based solution, Experience Cloud provides a fully managed, generally available version of LWR.

SEE ALSO:

Lightning Web Runtime Developer Guide

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

Lightning Web Security (LWS) is a new client-side security architecture for your Lightning web components. The 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. This feature, now generally available, includes some changes since the beta release.

Where: This change applies *only* to Lightning web components in Lightning Experience. Lightning web components in a managed package also use Lightning Web Security when you enable it. Aura components aren't supported. Experience Cloud sites aren't affected unless Lightning Message Service is used in Aura-based sites. Don't enable LWS if your org uses this combination of features.

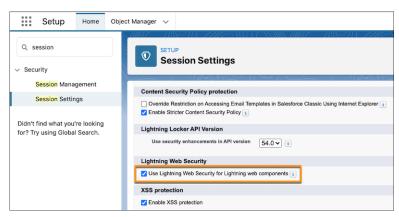
Why: Lightning Web Security aims to replace Lightning Locker for Lightning web components. LWS works along with Lightning Locker, which is still used for Aura components.

Like Lightning Locker, the new security architecture blocks or modifies API behaviors that aren't secure. In addition, LWS supports features that Lightning Locker doesn't. For more information, see Lightning Web Security Overview in the Lightning Web Components Developer Guide.

How: LWS isn't enabled by default. If your org contains no components or only Lightning web components, you can enable Lightning Web Security in Setup to begin using the new architecture. See When to Enable Lightning Web Security for guidance about enabling the feature.

We recommend that you first try Lightning Web Security in a sandbox staging environment. If testing shows that your components are working well, switch LWS on in a production org. If issues arise with your components later, you can easily return to using Lightning Locker for Lightning web components by deselecting the setting.

From Setup, in the Quick Find box, enter Session, and then select **Session Settings**. On the Session Settings page, select **Use Lightning Web Security for Lightning web components**.



To report issues, give feedback, and ask questions about Lightning Web Security, go to the Lightning Components Development group on Trailhead

For information about our plan to begin enabling LWS, see Enablement of Lightning Web Security Begins on page 214.

SEE ALSO:

Enablement of Lightning Web Security Begins

Ensure That Your Code Works in Lightning Web Security with New Tools

Lightning Web Components Developer Guide: Lightning Web Security (can be outdated or unavailable during release preview)
Lightning Web Security FAQ

Enablement of Lightning Web Security Begins

Salesforce plans to enable the Lightning Web Security (LWS) org setting on a rolling basis in production orgs that have *only* Lightning web components. If your org also has Aura components, or has no components, Lightning Web Security won't be enabled in Spring '22.

Where: This change applies *only* to Lightning web components in Lightning Experience. Lightning web components in a managed package also use Lightning Web Security when it's enabled. Aura components aren't supported. Experience Cloud sites aren't affected by this change unless Lightning Message Service is used in Aura-based sites. We won't enable LWS if your org uses this combination of features.

When: The feature is generally available for Lightning web components in all orgs, but isn't enabled by default for any orgs initially. Enablement for production orgs with only Lightning web components is scheduled to begin in February 2022. We'll notify affected customers by email at least 1 month before we enable Lightning Web Security.

Why: Lightning web components are already running with Lightning Locker. We expect components that run with Lightning Locker to also run with LWS without code changes. LWS and Lightning Locker provide many of the same security protections. We're starting with orgs that contain only Lightning web components to minimize disruption.

How: Only production orgs are to be enabled. If you're developing Lightning web components that aren't yet deployed in production, be sure to enable Lightning Web Security in your sandbox orgs to test the components before deploying. See Workflow to Try Your LWCs with Lightning Web Security.

SEE ALSO:

Secure Your Components Better, Stronger, Faster with Lightning Web Security (Generally Available) Ensure That Your Code Works in Lightning Web Security with New Tools Lightning Web Security FAQ

Ensure That Your Code Works in Lightning Web Security with New Tools

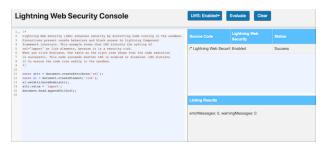
Try our new developer tools to ensure that your Lightning web component's JavaScript code works with Lightning Web Security (LWS).

Where: The new tools are available in the Lightning Component Library. Look for new tabs next to Locker Console and Locker API Viewer.

How: Use the tools to help make your code more secure and compliant with LWS.

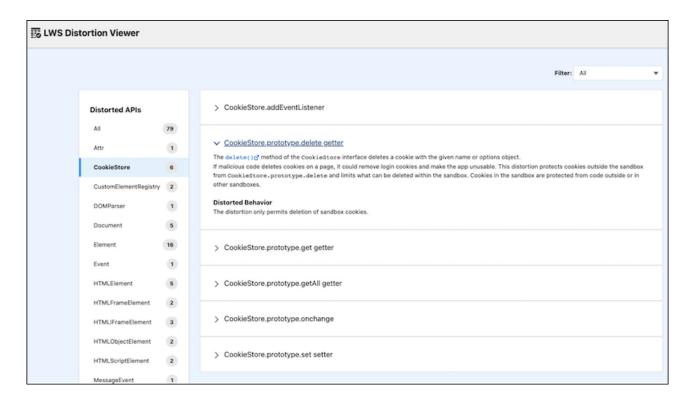
Lightning Web Security Console

Evaluate your code in Lightning Web Security Console as it runs with LWS enabled and disabled. This tool can help you determine if a problem with your JavaScript code is related to its interaction with LWS. For more information, see Evaluate JavaScript in Lightning Web Security Console.



LWS Distortion Viewer

View information about the security modifications, known as distortions, in LWS Distortion Viewer. LWS applies distortions to code running in a sandbox to help prevent behavior that's not secure. This tool can help you learn how to modify your JavaScript code to avoid distortions that affect your components. For more information, see <u>Look Up Distortion Details in LWS Distortion Viewer</u>.



SEE ALSO:

Secure Your Components Better, Stronger, Faster with Lightning Web Security (Generally Available) Enablement of Lightning Web Security Begins

Lightning Web Components Developer Guide: Lightning Web Security (can be outdated or unavailable during release preview)

Invalid HTML Syntax Results in Warnings

Warnings are displayed in the web console for invalid HTML syntax found in LWC markup.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Cloud sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components open source.

Why: The framework enforces valid syntax in all Lightning web components. Previously, components loaded without returning a warning even if they included invalid HTML syntax. In Spring '22, the web console displays invalid HTML syntax warnings to promote standard HTML practices in your code.



Note: In Winter '23, these warnings will be converted into errors, which can prevent your components from loading correctly.

How: We recommend that you fix invalid HTML syntax in your LWC markup. You can also enable HTML validation in Visual Studio Code using an HTML validator plugin.

LWC flags invalid markup for you, like when you have a missing closing tag or an extra closing tag. For example, an extra </template> tag in your component results in a compilation warning. Remove the extra closing tag to prevent warnings and future-proof your code.

```
</template> <!-- Remove extra closing tag --> </template>
```

SEE ALSO:

HTML Specification: Parse Errors

Customize Your Datatable with New Features

Enhance user interaction with your datatables. Programmatically change a focused field to edit mode from an external element such as a button. Display a lock icon on fields that can't be edited. Use an icon as a column header without a column label. Give a column a unique ID to enable a field name to be used in multiple columns.

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

How: These examples apply to lightning-datatable, but the new method and properties also work in lightning: datatable using Aura syntax.

Program an external element such as a button to direct the user to the first editable cell in your datatable component. Use the openInlineEdit() method to open the inline edit panel on the currently active cell or next editable cell in the datatable.

```
/* withInlineEdit.js */
import { LightningElement } from 'lwc';

export default class DatatableWithInlineEdit extends LightningElement {
  data = [];
  columns = columns;
  rowOffset = 0;

  handleClick() {
    const dt = this.template.querySelector('lightning-datatable');
    dt.openInlineEdit();
  }
}
```

To distinguish editable fields from read-only fields, you can mark read-only fields with a lock icon. To specify that a column's field is read-only and display a lock icon, set editable to false and displayReadOnlyIcon to true in the associated column definition.

```
const columns = [
    { label: 'Label', fieldName: 'name', editable: false, displayReadOnlyIcon: true },
    {
      label: 'Website',
      fieldName: 'website',
      type: 'url',
      editable: false,
      displayReadOnlyIcon: true,
    }
}
```

To display an icon instead of a label in a column header, hide the column label. Specify an iconName and set hideLabel to true. The label property is still required and is used for the icon's title and alternativeText attributes.

```
fieldName: 'id',
    type: 'orderingButtons',
    fixedWidth: 90,
    iconName: 'utility:trending',
    hideLabel: true,
},
// other column data
];
```

In some situations, multiple columns reference the same fieldName but have different fieldApiNames and different ways of working with the field information. To give a column a unique ID when using the same field name for two columns, use the attribute columnKey instead of fieldName on one of the column definitions.

Scan a Barcode in a Lightning Web Component (Generally Available)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning web components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way! This feature, now generally available, improves quality since the beta release.

Where: This feature is available in Lightning web components when they're running in the Salesforce mobile app or Mobile Publisher.

When: The beta version of BarcodeScanner is available today. The generally available version will be included in mobile app releases at the end of February 2022.

How: For complete details, see Scan Barcodes on a Mobile Device in the Lightning Web Components Developer Guide.

Use Location in a Lightning Web Component

Location is fundamental to mobile apps. Use the LocationService API to add location-based features to your Lightning web components. Get the current location and location updates within Lightning web components running on a mobile device. Show the current position on a map, provide directions, save the location when creating or updating a record, and otherwise add location awareness to your LWC apps.

Where: This feature is available in Lightning web components when they're running in Mobile Publisher.

When: The LocationService API is available today in Lightning Web Components, but not in the required mobile apps. LocationService will be included in mobile app releases at the end of February 2022.

How: Using LocationService in your Lightning web component is straightforward.

- 1. Import LocationService into your component definition.
- **2.** Test to make sure LocationService is available before you call location functions.
- **3.** Use the location functions to get or track the current location.

For complete details, see Use Location on a Mobile Device in the Lightning Web Components Developer Guide.

Lightning Components Release Updates

We're enforcing the Enforce CORS Allowlist for Lightning Apps release update.

IN THIS SECTION:

Enforce CORS Allowlist for Lightning Apps (Release Update)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server, although 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 and is enforced in Spring '22.

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.

Enforce CORS Allowlist for Lightning Apps (Release Update)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server, although 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 and is enforced in Spring '22.

Where: This change applies to Lightning Out and other Lightning apps in Lightning Experience and all versions of the Salesforce mobile app.

When: This update was first available in Winter '22 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

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

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

Einstein OCR support for handwritten text is now available for images and PDFs (beta). Use the power of Artificial Intelligence (AI) to add personalization to documents.

IN THIS SECTION:

Use Einstein OCR to Detect Handwritten Text (Beta)

Add personalization to your documents. Einstein's Optical Character Recognition (OCR) now extracts handwritten text from images and PDFs into Salesforce records. The OCR model translates the document layout and format so that it maps your text (handwritten or typed) to a relevant document type.

Use Einstein OCR to Detect Handwritten Text (Beta)

Add personalization to your documents. Einstein's Optical Character Recognition (OCR) now extracts handwritten text from images and PDFs into Salesforce records. The OCR model translates the document layout and format so that it maps your text (handwritten or typed) to a relevant document type.

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



Note: As a beta feature, Einstein OCR support for images and PDFs is a preview and isn't part of the "Services" under your Main Services Agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

How: To detect handwritten text in an image or PDF, you pass the file as you would an image file. Use either the sampleLocation parameter that contains the URL to the image or PDF file, or the sampleContent parameter that contains the binary content of the file uploaded as multipart/form-data. Here's an example of a cURL call to the OCR endpoint.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F
sampleLocation="https://www.cloudkicks.com/annual_report.pdf" -F task="text" -F
modelId="tabulateV2" https://api.einstein.ai/v2/vision/ocr
```

SEE ALSO:

Einstein Release Notes

Einstein Platform

Custom fields with the __pc suffix are Person Account custom fields on the Contact object and aren't supported for Einstein predictions. The AlApplication API doesn't support the delete() call. The Einstein Platform AlApplication API packaging information is added to the list of components available in managed packages.

IN THIS SECTION:

Custom Fields with pc Suffix Aren't Supported for Einstein Predictions

Custom fields with the __pc suffix are Person Account custom fields on the Contact object and aren't supported for Einstein predictions.

Alapplication API Doesn't Support delete()

The Einstein Platform Alapplication API incorrectly listed the delete() call as supported. The call listing is now removed from the documentation.

Get More AlApplication Packaging Information

The Einstein Platform AlApplication API packaging information is now included in the list of components available in managed packages.

Custom Fields with __pc Suffix Aren't Supported for Einstein Predictions

Custom fields with the __pc suffix are Person Account custom fields on the Contact object and aren't supported for Einstein predictions.

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

Why:When you enable the Person Account in your org, and create a custom field on the Contact object, Salesforce makes that custom field avialable in the Account object. To denote that the field exists in another object, Salesforce appends the __pc suffix to the name

of the field as it appears in the Account object. Due to special handling required for all Person Account fields, currently Einstein predictions cannot extend to custom fields on the Contact object.

SEE ALSO:

Einstein Release Notes

Alapplication API Doesn't Support delete()

The Einstein Platform Alapplication API incorrectly listed the delete() call as supported. The call listing is now removed from the documentation.

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

SEE ALSO:

Einstein Release Notes

Get More AlApplication Packaging Information

The Einstein Platform AlApplication API packaging information is now included in the list of components available in managed packages.

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

SEE ALSO:

Einstein Release Notes

Visualforce

Increase security of your Visualforce pages by reviewing and enabling the 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)

This release update is canceled. The release update isn't going to be enforced in its present form.

Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

Previously, the Visualforce Expression Language incorrectly validated the access modifiers of Apex methods defined by custom controllers. Developers could sometimes access unauthorized data on managed and system classes. To improve security, this update validates the access modifier for each method and throws an error if the Visualforce Expression Language can't invoke the method. This update was first made available in Winter '22 and is enforced in Spring '22.

Prevent Consecutive API Navigation Calls (Release Update)

In Visualforce pages and Lightning components, API navigation calls can be fired consecutively, which can lead to unwanted behavior due to competing API calls. This release update prevents this API navigation call pattern and fires only the first navigation call. When this release update was first made available, it applied only to Visualforce pages. It now also applies to Lightning components. 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 Winter '23.

Securely Call the Visualforce Remoting API (Release Update)

This release update is canceled. The release update isn't going to be enforced in its present form.

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

When: This update is canceled and no longer appears in the Release Update page in Setup.

SEE ALSO:

Release Updates

Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

Previously, the Visualforce Expression Language incorrectly validated the access modifiers of Apex methods defined by custom controllers. Developers could sometimes access unauthorized data on managed and system classes. To improve security, this update validates the access modifier for each method and throws an error if the Visualforce Expression Language can't invoke the method. This update was first made available in Winter '22 and is enforced in Spring '22.

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

When: This update was first made available in Winter '22 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To review this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Enable Visualforce Expression Language Apex Method Access Modifier Enforcement, follow the testing and activation steps.

Follow the access modifier requirements in the Apex Developer Guide so that Visualforce can validate your expression. For example, to make an Apex class and method visible in another namespace, declare the class and the method as global. If the class is declared as global but the method is declared as public, the method isn't visible.

If the Visualforce Expression Language can't invoke the method, this update throws an error that identifies the method's class and the namespace that can't access the method. The error message follows this format: The 'public String myMethod' method in the 'MyApexClassA' Apex class and the 'MyNamespaceA' namespace is not visible in the 'MyNamespaceB' namespace.

SEE ALSO:

Release Updates

Prevent Consecutive API Navigation Calls (Release Update)

In Visualforce pages and Lightning components, API navigation calls can be fired consecutively, which can lead to unwanted behavior due to competing API calls. This release update prevents this API navigation call pattern and fires only the first navigation call. When this release update was first made available, it applied only to Visualforce pages. It now also applies to Lightning components. 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 Winter '23.

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

When: This update is postponed to 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

Apex

Get hostnames for the domains that Salesforce hosts for your org. Use DataWeave in Apex (pilot) to enable data transformation to different formats. Find Apex classes that directly or indirectly implement an interface. Experience reduced minimum time between queueable jobs.

For more information on these enhancements, refer to the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

Get Org-Specific Domain Hostnames and Information

When you change your org's My Domain name due to a brand change or you enable enhanced domains, the domains that Salesforce hosts for your org change. To insulate your code against these changes, determine the hostnames for these domains with the new System. DomainCreator Apex class. For example, get the hostname for your org's My Domain login URL or the system-managed hostname for your Experience Cloud Sites. You can also get information about the domains that Salesforce hosts for your org with the new System. Domain class. Or use a URL or hostname to obtain information about the associated domains with the new System. DomainParser class.

Use DataWeave in Apex to Enable Data Transformation to Different Formats (Pilot)

DataWeave in Apex enhances native Apex data transformation support by integrating Mulesoft's DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats. We expect less Apex serialization, deserialization, and format transformation code to be written and maintained. We also anticipate less use of transaction heap and CPU limits, and compatibility with a wider range of data formats.

Find Which Apex Classes Implement an Interface (Beta)

Use the ApexTypeImplementor object to find Apex classes that directly or indirectly implement an interface. Using a SOQL query, you can get information about public or global Apex classes. In installed managed packages, you get information only about global Apex classes.

Experience Reduced Minimum Time Between Apex Queueable Jobs

We've reduced the minimum time between queueable jobs, resulting in possibly shorter time intervals between job executions. This change can impact Apex implementations that rely on specific time delays between job executions.

SEE ALSO:

Apex: New and Changed Items

Get Org-Specific Domain Hostnames and Information

When you change your org's My Domain name due to a brand change or you enable enhanced domains, the domains that Salesforce hosts for your org change. To insulate your code against these changes, determine the hostnames for these domains with the new System. DomainCreator Apex class. For example, get the hostname for your org's My Domain login URL or the system-managed hostname for your Experience Cloud Sites. You can also get information about the domains that Salesforce hosts for your org with the new System. Domain class. Or use a URL or hostname to obtain information about the associated domains with the new System. DomainParser class.

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

How: To determine the hostnames for the domains that Salesforce hosts for your org, use the methods in the new System.DomainCreator class. For example, the getOrgMyDomainHostname() method returns the hostname for your org's My Domain login URL and the getLightningHostname() method returns the hostname for your org's Lightning pages. And the getExperienceCloudSitesHostname() method returns the hostname for the system-managed domain for your org's Experience Cloud sites.

To obtain information about domains that Salesforce hosts for your org, use the methods in the new System.Domain class. For example, for a sandbox domain, the getSandboxName() method returns the name of the sandbox. And the getDomainType() method returns the associated System.DomainType enum value, which represents the type of domain, such as CONTENT_DOMAIN, EXPERIENCE CLOUD SITES DOMAIN, or LIGHTNING DOMAIN.

To use a URL or hostname to obtain information about the domains that Salesforce hosts for your org, use the methods in the new System. DomainParser class. Use the parse (hostname) method to parse a Salesforce-owned hostname for your org, such as **MyDomainName.**my.site.com and extract information about the domain. Use the parse (url) method to parse a Salesforce URL for your org, such as https://**MyDomainName.**my.site.com.

SEE ALSO:

Apex Reference Guide: Domain Class (Right-click to view in a new tab or window.)

Apex Reference Guide: DomainCreator Class (Right-click to view in a new tab or window.)

Apex Reference Guide: DomainParser Class (Right-click to view in a new tab or window.)

Apex Reference Guide: DomainType Enum (Right-click to view in a new tab or window.)

Use DataWeave in Apex to Enable Data Transformation to Different Formats (Pilot)

DataWeave in Apex enhances native Apex data transformation support by integrating Mulesoft's DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats. We expect less Apex serialization, deserialization, and format transformation code to be written and maintained. We also anticipate less use of transaction heap and CPU limits, and compatibility with a wider range of data formats.

Where: This feature is available in scratch orgs in both Lightning Experience and Salesforce Classic experience.



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

How: You can create DataWeave scripts as metadata and invoke them directly from Apex. Similar to Apex, DataWeave scripts are run within Salesforce application servers, enforcing the same heap and CPU limits on the executing code.

To participate in the pilot program, talk to your Salesforce Account Executive. For more information on the pilot, join the Trailblazer Community.

Find Which Apex Classes Implement an Interface (Beta)

Use the ApexTypeImplementor object to find Apex classes that directly or indirectly implement an interface. Using a SOQL query, you can get information about public or global Apex classes. In installed managed packages, you get information only about global Apex classes.

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: During the beta, ApexTypeImplementor returns only Apex classes that are currently compiled, as indicated by the isValid field. See Known Issues: ApexTypeImplementor is not returning implementation classes for further details and to track changes.

This example demonstrates how an interface allows flexibility in a configuration, record, or user-driven selection of the rounding strategy to apply. The multiple implementations of the interface can be discovered using ApexTypeImplementor and the specific implementation chosen based on user requirements.

```
// Common interface that all rounding strategies will implement
public interface RoundingStratergy {
   Decimal round (Decimal toRound);
public abstract class RoundingStrategies {
   public class Ceiling implements RoundingStratergy {
        public Decimal round(Decimal toRound) {
            return toRound.round(System.RoundingMode.CEILING);
   public class HalfDown implements RoundingStratergy {
        public Decimal round(Decimal toRound) {
            return toRound.round(System.RoundingMode.HALF DOWN);
        }
   public class TwoDecimalPlaces implements RoundingStratergy {
        public Decimal round(Decimal toRound) {
            return toRound.setScale(2, System.RoundingMode.HALF UP);
        }
List<ApexTypeImplementor> interfaceImpls = [
            SELECT ClassName, ClassNamespacePrefix
            FROM ApexTypeImplementor
            WHERE InterfaceName = 'RoundingStratergy' and IsConcrete=true];
// For example, an Admin could be presented with a list of Apex classes
// that could be applied. Simulated selection of 2 decimal places
ApexTypeImplementor selectedRoundingStratergy = interfaceImpls[2];
```

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: ApexTypeImplementor (Right-click to view in a new tab or window.)

Experience Reduced Minimum Time Between Apex Queueable Jobs

We've reduced the minimum time between queueable jobs, resulting in possibly shorter time intervals between job executions. This change can impact Apex implementations that rely on specific time delays between job executions.

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

API

Legacy API Versions 7.0 Through 20.0 will be retired in Summer '22.

IN THIS SECTION:

Legacy API Versions 7.0 Through 20.0 will be retired in Summer '22

Versions 7.0 through 20.0 of the Salesforce Platform API are deprecated and are no longer supported by Salesforce. They will be retired in Summer '22. If you're using versions 7 through 20 of the SOAP, REST, or BULK APIs, you're using an unsupported product.

Legacy API Versions 7.0 Through 20.0 will be retired in Summer '22

Versions 7.0 through 20.0 of the Salesforce Platform API are deprecated and are no longer supported by Salesforce. They will be retired in Summer '22. If you're using versions 7 through 20 of the SOAP, REST, or BULK APIs, you're using an unsupported product.

Where: This change will affect these API versions.

Bulk API

16.0, 17.0, 18.0, 19.0, 20.0

SOAP AP

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 change affects all REST APIs that use URIs under /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 API versions 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.

You can use the new CONNECTED_APP_ID field on the API Total Usage event type to get the ID of the Connected App sending API requests. You can use the Connected App ID to better understand where requests are coming from and identify connected apps that make requests to deprecated API versions.

For more information, see Salesforce Platform API Versions 7.0 through 20.0 Retirement.

Packaging

Removing metadata components from second-generation managed packages is generally available. We enhanced the experience of working with package ancestors. And we're enforcing multi-factor authentication for logins to subscriber orgs.

IN THIS SECTION:

Remove Metadata Components from Second-Generation Managed Packages (Generally Available)

Remove metadata components that you no longer want in your second-generation managed packages.

Specify Package Ancestors Using New Keywords

Specifying a package ancestor for your second-generation managed package lets you branch your package development and abandon unwanted package versions. Based on your feedback, we improved the experience of working with package ancestors.

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

With this update, we secure access to subscriber orgs by requiring multi-factor authentication (MFA) when logging into the License Management Org (LMO). MFA is required only for LMO users who require access to the Subscriber Support Console. This update was first made available in Spring '21 and is enforced in Spring '22.

Understand Component Behaviors in Managed Packages

We made it easier for you to find information about component behavior in managed packages. We also heard from you that profiles are tricky to package, so we're sharing some guidance on the expected behavior.

Increase Your Licensing Agility with the Partner Licensing Platform (Developer Preview)

The new Partner Licensing Platform transforms how you price, license, and distribute your applications. Develop and distribute multiple license types for your package that entitle specific features, without breaking up your package structure. Using your own custom permission set licenses, you can increase and diversify your revenue stream by selling multiple tiers, versions, or supplements for your products.

Include Field Restriction, Restriction, and Scoping Rules in Unlocked Packages

Salesforce now supports field restriction rules, restriction rules, and scoping rules in unlocked packages. Customers with multiple Salesforce orgs can include these rules before creating an unlocked package and installing it in a target environment.

Remove Metadata Components from Second-Generation Managed Packages (Generally Available)

Remove metadata components that you no longer want in your second-generation managed packages.

Where: This change applies to second-generation managed packages.

How: To request access to this feature, log a case in the Salesforce Partner Community. After this feature is enabled, remove the metadata component's source file from your Salesforce DX project, and create a package version.

To learn more about this feature, see Remove Metadata Components from Second-Generation Managed Packages in the Salesforce DX Developer Guide.

Specify Package Ancestors Using New Keywords

Specifying a package ancestor for your second-generation managed package lets you branch your package development and abandon unwanted package versions. Based on your feedback, we improved the experience of working with package ancestors.

Where: This change applies to second-generation managed packages.

Why: To ensure that you're explicitly setting your package ancestors, setting an ancestor is now required when you create a package version. To make it easier to increment your package ancestor version number or to override this requirement, we added two keywords and a Salesforce CLI parameter. These changes help ensure that developers don't inadvertently set the ancestor to an incorrect version. Package ancestry determines package version upgrade paths, so specifying an incorrect ancestor can prevent a customer from being able to upgrade to that package version.

How: To avoid having your package version creation fail, select one of these options.

- Use the new HIGHEST keyword in the ancestorVersion or ancestorId field in the sfdx-project.json file. This keyword ensures that the ancestor is always set to the highest promoted package version.
- To create a package version without an ancestor, use the new NONE keyword in the ancestorVersion or ancestorId field of the sfdx-project.json file.
- To override the ancestry requirements, you can use the Salesforce CLI parameter --skipancestorcheck when creating a
 package version. When you use this parameter you can specify an ancestor that isn't the highest promoted package version, or you
 can omit specifying an ancestor.

SEE ALSO:

Salesforce DX Developer Guide: Package Ancestors (Right-click to view in a new tab or window.)

Salesforce DX Developer Guide: Specify a Package Ancestor in the DX Project File (Right-click to view in a new tab or window.)

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

With this update, we secure access to subscriber orgs by requiring multi-factor authentication (MFA) when logging into the License Management Org (LMO). MFA is required only for LMO users who require access to the Subscriber Support Console. This update was first made available in Spring '21 and is enforced in Spring '22.

Where: This change applies to the License Management Orgs used to support first- and second-generation managed packages.

When: This update was first available in Spring '21 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This change provides subscribers an added layer of security for managed packages by verifying the identity of users accessing their org. It also provides you more control and accountability over which users log in to a subscriber org.

How: This update blocks attempts to access the Subscriber Support Console if the LMO session hasn't been established using multi-factor authentication.

If you haven't already tested this Release Update, determine which users require access to the Subscriber Support Console, and then set up multi-factor authentication (MFA) for those users.

Notify impacted LMO users about the MFA requirement and how to start using MFA to log in to the LMO.

Starting in Spring '22, subscribers also have the option of requiring you to complete a second MFA when logging in to their org from the Subscriber Support Console. In this scenario, your login attempt sends an MFA notification to your subscriber, and your login is

blocked until your subscriber responds to the notification. By default, the setting that requires a second MFA challenge is disabled. If subscribers require that second layer of security, they must contact Salesforce Customer Support.

SEE ALSO:

Salesforce DX Developer Guide: Log In To Subscriber Orgs (Right-click to view in a new tab or window.)

ISV force Guide: Log In To Subscriber Orgs (Right-click to view in a new tab or window.)

Require Multi-Factor Authentication When Logging In as Another User

Release Updates

Understand Component Behaviors in Managed Packages

We made it easier for you to find information about component behavior in managed packages. We also heard from you that profiles are tricky to package, so we're sharing some guidance on the expected behavior.

Where: This change applies to documentation in the Salesforce DX Developer Guide and the ISV force Guide.

Why: Understanding component behavior in managed packages is essential to your success. Here's what we've been working on.

- Components Available in Managed Packages—We reorganized the information about components so that you can find all the details about a component in a single location.
- How We Handle Profile Settings in Second-Generation Managed Packages—This new developer guide topic addresses frequently asked questions about the expected behavior when packaging profile settings.

Increase Your Licensing Agility with the Partner Licensing Platform (Developer Preview)

The new Partner Licensing Platform transforms how you price, license, and distribute your applications. Develop and distribute multiple license types for your package that entitle specific features, without breaking up your package structure. Using your own custom permission set licenses, you can increase and diversify your revenue stream by selling multiple tiers, versions, or supplements for your products.

Where: This change applies to first- and second-generation managed packages.



Note: The Partner Licensing Platform is available as a developer preview. The Partner Licensing Platform 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 participate in this developer preview, submit a participation request via the Partner Licensing Platform Developer Preview Partner Community group. After the Platform Licensing Platform is enabled, you can create custom permission set licenses with licensed custom permissions in new development scratch orgs created specifically for testing these features. For more information on using the platform, see the ISV force Guide.

SEE ALSO:

ISVforce Guide: Partner Licensing Platform (Developer Preview)

Include Field Restriction, Restriction, and Scoping Rules in Unlocked Packages

Salesforce now supports field restriction rules, restriction rules, and scoping rules in unlocked packages. Customers with multiple Salesforce orgs can include these rules before creating an unlocked package and installing it in a target environment.

Where: This change applies to unlocked packages.

Sandboxes

We updated our approach to managing the expiration process for inactive sandboxes.

IN THIS SECTION:

Updates to Inactive Sandbox Expiration Process

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

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: The user who requested the sandbox is notified of the upcoming expiration date. If this user is inactive, then all users in the production org with the Manage Sandbox user permission are notified.

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. Use Performance Assistant for scalability and performance testing.

IN THIS SECTION:

Plan and Test Your System for Scale Using Performance Assistant

Performance Assistant is your central hub of information and resources about scalability and performance testing with Salesforce. Use the step-by-step instructions, articles, and tools to help you architect your system, conduct performance testing, and interpret your results.

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.

Plan and Test Your System for Scale Using Performance Assistant

Performance Assistant is your central hub of information and resources about scalability and performance testing with Salesforce. Use the step-by-step instructions, articles, and tools to help you architect your system, conduct performance testing, and interpret your results.

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

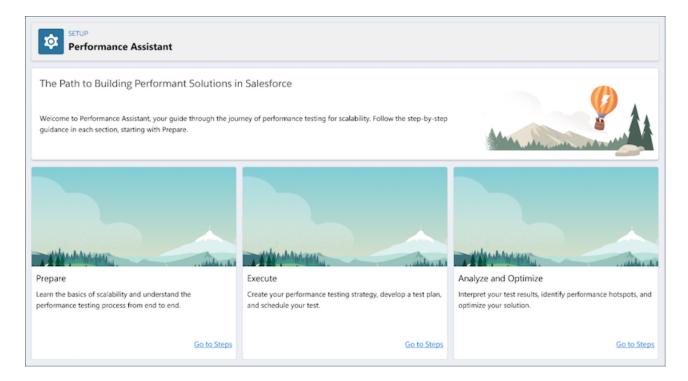
Who: To use Performance Assistant, users need the View Setup and Configuration user permission.

How: From Setup, in the Quick Find box, enter Performance Assistant, and then select Performance Assistant.

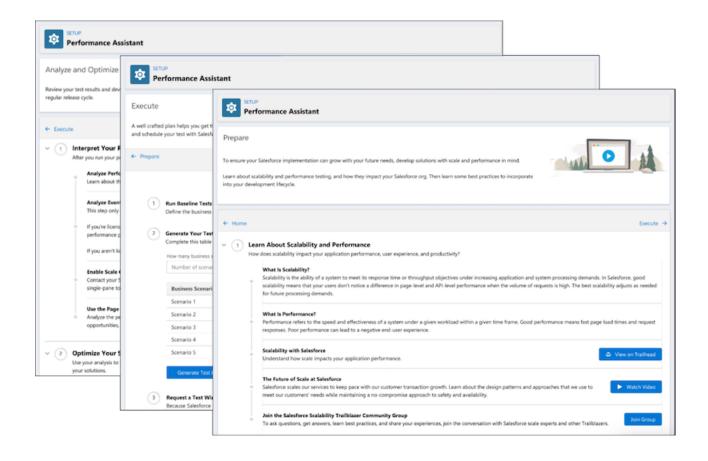
M

Note: To ensure that Performance Assistant appears in Setup, make sure that your Salesforce org is on the latest release.

Performance Assistant guides you through the three phases of performance testing: Prepare, Execute, and Analyze and Optimize.



In each phase, Performance Assistant provides guidance and resources to help you test your system with confidence. You can revisit any stage of Performance Assistant during your round of testing. We recommend that you integrate performance testing into your release cycle.



SEE ALSO:

Knowledge Article: Performance test FAQs

Trailblazer Community Group: Salesforce Scalability

Develop Platform Apps with Ease

The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

Salesforce Extensions for Visual Studio Code

This extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor. Read the weekly release notes to learn about recent updates.

Salesforce CLI

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about recent updates.

SEE ALSO:

Salesforce Extensions for Visual Studio Code Salesforce CLI Setup Guide Salesforce CLI Command Reference Salesforce DX Developer Guide

Lightning Design System

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with 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.

IN THIS SECTION:

Customize Components with Lightning Design System Styling Hooks (Generally Available)

Lightning Design System Styling Hooks provide you with a set of CSS custom properties so you can customize a component's look and feel. This feature, now generally available, includes some changes since the beta release. This release adds CSS custom property capabilities to our supported components, and it adds a legacy style sheet for browsers that don't support CSS custom properties, such as IE11. This release also updates the styling hook namespace from --sds to --slds.

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Why: Styling hooks make it easy to customize component styling and express your brand, especially when working with web components and shadow DOM. For a list of component blueprints that support styling hooks, see the Blueprint Overview. For details about the namespace change, see Styling Hooks.

```
How: Styling hooks are placeholders in the Lightning Design System style sheet, for example, var (--slds-c-badge--color-background, #ecebea), which enable you to use the corresponding --slds-c-badge-color-background CSS custom property with your own styling.
```

A CSS custom property corresponds to a Lightning Design System component blueprint and its design variations. Let's look at a Lightning web component that implements the button blueprint with the brand variation, which turns the background color a standard Salesforce blue.

To apply a different background color to the brand variation, specify the corresponding CSS custom property. In this case, declare your style via the <code>--slds-c-button-brand-color-background</code> custom property. To target all elements in a component with your custom styles, use the <code>:host</code> selector.



Note: Alternatively, you can scope your customizations using other selectors, such as an element or custom class. For more information, see the Lightning Design System website.

```
:host {
    --slds-c-button-brand-color-background: orange;
    --slds-c-button-brand-color-border: orange;
    /* Other CSS custom properties here */
}
```

This CSS declaration turns your button elements with the slds-button brand class orange.

If you're overriding the styles by targeting an SLDS class name in your template, replace them with CSS custom properties instead. For example, replace the following style override with --slds-c-button-brand-color-background.

```
/* Replace this CSS rule with
   the --slds-c-button-brand-* custom properties
   as shown in the previous example */
.slds-button_brand {
    background-color: orange;
}
```

Let's look at base components next. Base components implement Lightning Design System blueprints and design variations. Previously, you couldn't customize the style on a base component easily. To customize the style on a base component such as lightning-button, specify the corresponding CSS custom property.



}

Tip: You can look at how we implement Lightning Design System in many of the base components in the Base Components Recipes GitHub repository. For interactive examples of the base components, see the Component Reference.

SEE ALSO:

Lightning Web Components Developer Guide: Style Components Using Lightning Design System Styling Hooks

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

IN THIS SECTION:

Salesforce Functions (Generally Available)

Salesforce Functions allows you to build digital experiences with common abstractions in a single environment for code and low code on the Salesforce platform. With support for code written in Java, JavaScript, and Typescript, Salesforce Functions provide a platform for custom, elastically scalable business logic using the language and tools of your choice.

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Stay up to date with the Salesforce Functions Release Notes in the Developer Guide.

SEE ALSO:

Welcome to Salesforce Functions

Trailhead: Discover Salesforce Functions

AppExchange Partners

Analyze org, package, and custom entity metadata with AppExchange App Analytics subscriber snapshots.

IN THIS SECTION:

Discover Metadata Details with AppExchange App Analytics Subscriber Snapshots

App Analytics subscriber snapshots provide a daily summary of how subscribers are using your managed packages. Now you can use snapshot metadata to analyze org, custom entity, and package data by attribute_name and attribute_value.

Discover Metadata Details with AppExchange App Analytics Subscriber Snapshots

App Analytics subscriber snapshots provide a daily summary of how subscribers are using your managed packages. Now you can use snapshot metadata to analyze org, custom entity, and package data by attribute_name and attribute_value.

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 support case in the Salesforce Partner Community. For product, select **Partner Programs & Benefits**. For topic, select **ISV Technology Request**.

SEE ALSO:

ISVforce Guide: Subscriber Snapshots

Change Data Capture

Receive change notifications for more objects.

IN THIS SECTION:

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the Territory2AlignmentLog object.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the Territory2AlignmentLog object.

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

How: Change Data Capture is available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel.

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: Territory2AlignmentLog (Right-click to view in a new tab or window.)
Platform Events Developer Guide: Change Data Capture Events

Platform Events

Filter platform event streams with channels (beta), and send event messages to Amazon EventBridge with Event Bus Relay (pilot).

IN THIS SECTION:

Filter Your Stream of Platform Events with Channels (Beta)

Optimize event processing by receiving only the event messages that match a predefined filter on a custom channel. Create a channel, and configure it with a complex filter that CometD clients can subscribe to. With fewer events delivered to subscribers, subscribers can make more efficient use of the event delivery allocation. This feature, offered last release as a pilot, has some enhancements and is now a publicly available beta.

Connect Salesforce Events with Amazon EventBridge in AWS (Pilot)

Use Event Bus Relay to send and receive platform event messages and change data capture event messages between Salesforce and AWS, without writing an integration app or using middleware. By using Event Bus Relay in Salesforce with Amazon EventBridge in AWS, your Salesforce event-driven apps can use AWS services to process events. You can also send platform event messages from AWS back to Salesforce, where subscribers can process them using Salesforce Platform capabilities.

Filter Your Stream of Platform Events with Channels (Beta)

Optimize event processing by receiving only the event messages that match a predefined filter on a custom channel. Create a channel, and configure it with a complex filter that CometD clients can subscribe to. With fewer events delivered to subscribers, subscribers can make more efficient use of the event delivery allocation. This feature, offered last release as a pilot, has some enhancements and is now a publicly available beta.

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.

Why: We added these enhancements.

- Support for the LIKE comparison operator.
- Support for the OR and NOT logical operators. (The logical operator AND continues to be supported.)
- The Date/Time field value can now include the UTC time zone designator Z: YYYY-MM-DDThh:mm:ssZ. Previously, only the time zone offsets were supported.
- Improved validation. For example, an error is returned when you attempt to delete a field that is referenced in a filter expression.

How: With the Customize Application permission, you can configure stream filtering using Tooling API or Metadata API. For the beta release, 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.

This example shows a filter expression value in the PlatformEventChannelMember.FilterExpression field.

```
(City__c LIKE 'S%' OR City__c='New York') AND Has_Shipped__c=true
AND Delivery_Date__c>2021-10-21T09:30:11-08:00
```



Note:

- Custom channels and channel members are shared features with Change Data Capture. As a result, for the beta, Change Data
 Capture allocations are used as part of the platform event stream filter configuration. Each unique platform event that 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 beta feature is supported for custom platform events that you define but not for standard platform events, such as real-time event monitoring events. A separate pilot is available for filtering change data capture events. For more information, contact Salesforce.
- This beta feature supports CometD subscribers. It doesn't support other types of subscribers, such as Apex triggers, flows, and processes.

Connect Salesforce Events with Amazon EventBridge in AWS (Pilot)

Use Event Bus Relay to send and receive platform event messages and change data capture event messages between Salesforce and AWS, without writing an integration app or using middleware. By using Event Bus Relay in Salesforce with Amazon EventBridge in AWS, your Salesforce event-driven apps can use AWS services to process events. You can also send platform event messages from AWS back to Salesforce, where subscribers can process them using Salesforce Platform capabilities.

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.

When: This pilot is available later in the Spring '22 release.

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. Work with marketing integration forms, which are now generally available. Take advantage of Salesforce Customer Data Platform's enhancements. Participate in the Site Search and Enhanced CMS Workspaces beta.

API: New and Changed Items

Access more data objects and metadata types in API version 54.0.

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

IN THIS SECTION:

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.

Changed Aura Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

These components have changed.

lightning-datatable

This method is new.

• openInlineEdit() — Programmatically change an editable focused field to edit mode from an external element such as a button.

These column properties are new.

- hideLabel—Hides the column label and displays only an icon when iconName is also specified. The label property
 is still required and is used for the icon's title and alternativeText attributes.
- columnKey—Use instead of fieldName to give a column a unique ID if the same field name is used for two columns.
- displayReadOnlyIcon—Displays a lock icon when a field isn't editable.

This column property has changed.

iconName—The icon appears without a label when hideLabel is also specified.

See Customize Your Datatable with New Features on page 216 for more details.

lightning-progress-ring

The ring is now wider at its leading end to better indicate progress direction.

Accessibility Changes for Components

All components are affected by this change.

• Now you can turn off auto-focus on any element with a new CSS class, .ignore-autofocus.

Components that are used to display editable fields in record forms have these accessibility improvements.

- The help icon that's displayed in record form fields renders with alternative text that references the field name. For example, a phone field's help icon displays Phone Help Info.
- The edit button on editable fields in a record form that's in view mode renders with assistive text that references the name of the field. Users of assistive devices such as screen readers can more easily discern which field an edit button supports. For example, on an editable phone field, the edit button displays Edit: Phone.

These components are affected by these changes.

- lightning-combobox
- lightning-dual-listbox
- lightning-input
- lightning-input-address
- lightning-input-location
- lightning-input-name
- lightning-input-rich-text
- lightning-output-field
- lightning-select
- lightning-textarea

SEE ALSO:

Component Library

Customize Your Datatable with New Features

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/uiRelatedListApi (Beta)

This module includes new wire adapters to get records, metadata, and record count for a related list.

- getRelatedListRecords—Returns record data for a related list.
- getRelatedListInfo—Returns metadata for a related list.
- getRelatedListsInfo—Returns metadata for multiple related lists.
- getRelatedListCount—Returns the record count for a related list.

```
import { LightningElement, wire } from 'lwc';
import { getRelatedListRecords } from 'lightning/uiRelatedListApi';

export default class LdsGetRelatedListRecords extends LightningElement {
    @wire(getRelatedListRecords, {
        parentRecordId: '001RM000003UNu6YAG',
        relatedListId: 'Contacts',
        fields: ['Contact.Name','Contact.Id']
    })
}
```

For more information, see *Lightning Web Components Dev Guide*: lightning/uiRelatedListApi (Right-click to view in a new tab or window.).

Changed Modules

The following modules have a new wire adapter or JavaScript function.

lightning/analyticsWaveApi

This module includes new wire adapters and methods for working with dataflows and recipe notifications.

The new wire adapters are:

- getDataflows—Returns a collection of Tableau CRM dataflows.
- getRecipeNotification— Returns the Tableau CRM recipe notification settings by recipe ID.

The new method is:

updateRecipeNotification— Updates the existing Tableau CRM recipe notification settings by recipe ID.

Use these wire adapters and methods to retrieve Tableau CRM dataflows and the recipe notification settings and to update Tableau CRM recipe notification settings.

```
import { LightningElement, api, wire } from "lwc";
import { updateRecipeNotification } from 'lightning/analyticsWaveApi';
import { ShowToastEvent } from 'lightning/platformShowToastEvent';
export default class UpdateRecipeNotification extends LightningElement {
 @api recipeId; // or fetch the ID
 notification = {
    "longRunningAlertInMins": 60,
    "notificationLevel": "Always"
  };
 update(event) {
   updateRecipeNotification({ id: this.recipeId })
      .then(() => \{
         this.dispatchEvent(
           new ShowToastEvent({
             title: 'Success',
             message: 'Recipe notification settings updated',
              variant: 'success'
              })
            );
         });
      })
      .catch(error => {
        this.dispatchEvent(
           new ShowToastEvent({
              title: 'Error updating recipe notification',
              message: error.body.message,
              variant: 'error'
        })
     );
   });
}
```

Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

These components have changed.

lightning:datatable

This method is new.

• openInlineEdit() — Programmatically change an editable focused field to edit mode from an external element such as a button.

These column properties are new.

- hideLabel—Hides the column label and displays only an icon when iconName is also specified. The label property
 is still required and is used for the icon's title and alternativeText attributes.
- columnKey—Use instead of fieldName to give a column a unique ID if the same field name is used for two columns.
- displayReadOnlyIcon—Displays a lock icon when a field isn't editable.

This column property has changed.

iconName—The icon appears without a label when hideLabel is also specified.

See Customize Your Datatable with New Features on page 216 for more details.

lightning:progressRing

The ring is now wider at its leading end to better indicate progress direction.

wave:waveDashboard

This method is new.

• refresh—Rerun either all queries on the dashboard or a particular query. Can take an optional config argument with a step id to specify the individual query to rerun.

This attribute is new for the setState method config argument.

• replaceState—Indicates whether the state for the dashboard is fully replaced on the set call (true) or the current state is retained and appended to (false). The default value is false.

Accessibility Changes for Components

All components are affected by this change.

• Now you can turn off auto-focus on any element with a new CSS class, .ignore-autofocus.

Components that are used to display editable fields in record forms have these accessibility improvements.

- The help icon that's displayed in record form fields renders with alternative text that references the field name. For example, a phone field's help icon displays Phone Help Info.
- The edit button on editable fields in a record form that's in view mode renders with assistive text that references the name of the field. Users of assistive devices such as screen readers can more easily discern which field an edit button supports. For example, on an editable phone field, the edit button displays Edit: Phone.

These components are affected by these changes.

- lightning:combobox
- lightning:dualListbox
- lightning:input
- lightning:inputAddress
- lightning:inputLocation
- lightning:inputName

- lightning:outputField
- lightning:textarea

SEE ALSO:

Component Library

Customize Your Datatable with New Features

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:

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Cache Namespace

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Pref center Namespace

Pref_center is a new namespace that includes classes, methods, and enums to create and manage preference forms in Preference Center.

Schema Namespace

The Schema namespace has these new methods.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Sfdc Surveys Namespace

The Sfdc Surveys namespace has these new interfaces and methods.

Wave Namespace

The Wave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

Apex: New Features

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Interfaces

Confirm single sign-on user mappings between Salesforce and a third-party identity provider

Use the new Auth.ConfirmUserRegistrationHandler interface.

Cache Namespace

The Cache namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Get the cached values for a specified set of cache keys

Use the new get (keys) method in the Cache.Org, Cache.Partition, and Cache.Session classes.

Check if the cache contains values for a specified set of keys

Use the new contains (setOfKeys) method in the Cache.Org, Cache.Partition, and Cache.Session classes.

New Exceptions

Exception thrown when the number of keys in bulk API calls exceeds the maximum limit of 10

The new Cache.BulkApiKeysLimitExceededException exception is thrown for the .contains (setOfKeys) and the get(keys) methods.

Pref_center Namespace

Pref_center is a new namespace that includes classes, methods, and enums to create and manage preference forms in Preference Center.

New Classes

Populate the values in components of a Preference form

Use the new LoadFormData class.

Add a defined option to a picklist, radio button, or checkbox field in a form

Use the addOption (fieldId, option) method.

Add an option to a field in a form using the label and value

Use the addOption(fieldId, value, label) method.

Add an option to a checkbox field that is selected

Use the addSelectedOption(fieldId, option) method.

Set a label of a button as the passed value

Use the setButtonLabel (fieldId, label) method.

Add a list of options to a field in a form

Use the setOptions (fieldId, options) method.

Set the selected option in a picklist or radio button field to be the passed value

Use the setSelectedOption (fieldId, optionValue) method.

Add a list of options in a picklist or radio button field that are selected

Use the setSelectedOptions (fieldId, options) method.

Set hint text for a text entry field

Use the setTextHint(fieldId, hintText) method.

Set the value of a text entry field as the passed value

Use the setTextValue (fieldId, value) method.

Retrieve record Id information for parameters passed into the load-form handler

Use the new LoadParameters class.

Retrieve the untokenized version of the record Id to load pre-existing preferences into the form

Use the getRecordId() method.

Retrieve information on buttons and options selected in a preference form

Use the new SubmitFormData class.

Retrieve the fieldId of a button clicked in a form

Use the getButtonClicked() method.

Retrieve the fieldId of a value set on a picklist or radio button field when the form was loaded

Use the getOldSelectedValue (fieldId) method.

Retrieve the fieldIds of the values set on a checkbox field when the form was loaded

Use the getOldSelectedValues (fieldId) method.

Retrieve the string value that was set on a text input field when the form was loaded

Use the getOldStringValue (fieldId) method.

Retrieve the string value of an option that was selected on a picklist, radio button, or text input field when the form was submitted

Use the getSelectedValue (fieldId) method.

Retrieve the string values of options that were selected on a checkbox, picklist, or radio button field when the form was submitted

Use the getSelectedValues (fieldId) method.

Retrieve the string value that was set on a text input field when the form was submitted

Use the getStringValue (fieldId) method.

Retrieve record Id information for parameters passed into the submit-form handler

Use the new SubmitParameters class.

Retrieve the untokenized version of the record Id to submit edited form preferences back to the record

Use the getRecordId() method.

Generate authentication tokens to access Preference forms

Use the new TokenUtility class.

Retrieve an access token using the given token type

Use the generateToken (tokenValue, tokenType) method.

Retrieve an access token using the standard token type

Use the generateToken (tokenValue) method.

Retrieve an access token map using the given token type

Use the generateTokens (tokenValues, tokenType) method.

Retrieve an access token map using the standard token type

Use the generateTokens (tokenValues) method.

New Enums

Specify a token type in the generateToken (tokenValue, tokenType) and generateTokens (tokenValue, tokenType) methods.

Use the new TokenType enum.

New Interfaces

Pass data between your organization and a preference form.

Implement the new PreferenceCenterApexHandler interface.

Retrieve the record Ids and initial values of a preference form

Use the load (var1, var2, var3) method.

Update the changed values when a preference form is submitted

Use the submit (var1, var2, var3) method.

Schema Namespace

The Schema namespace has these new methods.

New or Changed Methods in Existing Classes

Get additional metadata about a type of associated object if it's associated to a specific parent type

Use the getAssociateEntityType() and getAssociateParentEntity() methods in the Schema.DescribeSObjectResult class. We also added the properties associateentitytype and associateparententity to the Schema.DescribeSObjectResult class.

Introduced in API version 50.0, these methods and properties have been added to the Apex Reference Guide.

Versioned Behavior Change in DescribeSObjectResult.isAccessible()

Starting with this release (API version 54.0), DescribeSObjectResult.isAccessible() returns false if the user doesn't have permissions to access the queried custom settings and custom metadata types. In API version 53.0 and earlier, the method returns true even if the user doesn't have the required permissions.

SEE ALSO:

Apex Reference Guide: DescribeSObjectResult Class

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Obtain information about domains that Salesforce hosts for your org

Use the methods in the new System.Domain class. For example, for a sandbox domain, the getSandboxName() method returns the name of the sandbox. And the getDomainType() method returns the associated System.DomainType enum value, which represents the type of domain, such as CONTENT_DOMAIN, EXPERIENCE_CLOUD_SITES_DOMAIN, or LIGHTNING DOMAIN.

Generate hostnames for domains that Salesforce hosts for your org

Use the methods in the new System. DomainCreator class.

For example, the getOrgMyDomainHostname() method returns the hostname for your org's My Domain login URL and the getLightningHostname() method returns the hostname for your org's Lightning pages. And the getExperienceCloudSitesHostname() method returns the hostname for the system-managed domain for your org's Experience Cloud sites.

Use a URL or hostname to obtain information about domains that Salesforce hosts for your org

Use the methods in the new System. DomainParser class to parse these domains and extract information about the domain. Use the parse (hostname) method to parse a Salesforce-owned hostname for your org, such as

MyDomainName.my.site.com and extract information about the domain. Use the parse (url) method to parse a Salesforce URL for your org, such as https://**MyDomainName.**my.site.com.

New or Changed Methods in Existing Classes

Test permission set groups in Apex tests.

Use the new calculatePermissionSetGroup () method in the System. Test class.

Fix 18-character Salesforce Ids so that they align with their encoded casing

Use the new valueOf (str, restoreCasing) method in the System. Id class.



Note: Starting with this release, assigning an invalid 15-character or 18-character ID to a variable results in an exception of type System.StringException.

Asynchronously create an Experience Cloud site user.

Use the new createExternalUserAsync (user, contact, account) method in the System. Network class.

New Enums

Determine the type of a Salesforce org domain

The new System.DomainType enum represents the type of a System.Domain, such as CONTENT DOMAIN, EXPERIENCE CLOUD SITES DOMAIN, OR LIGHTNING DOMAIN.

Changed Enums

Identify the execution of a post install script during a package install or upgrade

Use the new POST INSTALL SCRIPT Quiddity enum value. Retrieve Quiddity values using methods in the System. Request class.

Sfdc_Surveys Namespace

The Sfdc_Surveys namespace has these new interfaces and methods.

New Interfaces

Shorten survey invitations to distribute over customer engaged channels

Use the new sfdc surveys.SurveyInvitationLinkShortener interface.

New Methods

Get a shortened URL for a given survey invitation

Use the new getShortenedURL(var1) method in the sfdc surveys.SurveyInvitationLinkShortener interface.

SEE ALSO:

Apex Reference Guide: SurveyInvitationLinkShortner Interface

Wave Namespace

The Wave namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Retrieve Tableau CRM templates from Apex code

The new Wave. Templates class has these methods:

Get all Tableau CRM templates

Use the Wave. Templates.getTemplates() method to retrieve a map of templates.

Get a filtered collection of Tableau CRM templates

Use the Wave. Templates.getTemplates (Wave. Templates SearchOptions options) method to retrieve a filtered map of templates that match the specified search options.

Get a specific Tableau CRM template

Use the wave.Templates.getTemplate (String templateIdOrApiName) method to retrieve the template matching the specified template ID or API name.

Get the Tableau CRM template configuration

Use the wave.Templates.getTemplateConfig(String templateIdOrApiName) method to retrieve the template configuration information matching the specified template ID or API name.

Specify the search options for Tableau CRM templates from Apex code

The new Wave. Templates SearchOptions class has these properties.

Specify the Connect API filter group

Use the filterGroup property. Valid values are big, medium, and small.

Specify the template type

Use the type property. Valid values are app, dashboard, embedded, and lens.

Specify the template visibility options

Use the options property. Valid values are CreateApp, ViewOnly, and ManageableOnly.

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

Create custom experiences in Salesforce using Connect in Apex. Work with marketing integration forms, which are now generally available. Take advantage of Salesforce Customer Data Platform's enhancements. Participate in the Site Search and Enhanced CMS Workspaces beta.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the ConnectApi namespace. These methods use other ConnectApi classes to input and return information. We refer to the ConnectApi namespace as Connect in Apex.

IN THIS SECTION:

New and Changed Connect in Apex Classes

These classes are new or have changes.

Changed Connect in Apex Output Classes

This output class has changes.

SEE ALSO:

Connect REST API

Apex Reference Guide: ConnectApi Namespace

Connect REST API Developer Guide

New and Changed Connect in Apex Classes

These classes are new or have changes.

B2B Commerce on Lightning Experience

These new methods are in the ConnectApi.CommerceBuyerExperience class.

Create a Commerce account address for a webstore account

createCommerceAccountAddress(webstoreId, accountId, addressInput)

New input class: ConnectApi.commerceAddressInput

New output class: ConnectApi.CommerceAddressOutput

Delete a Commerce account address

deleteCommerceAccountAddress(webstoreId, accountId, addressId)

Get a Commerce account address for a webstore

getCommerceAccountAddress (webstoreId, accountId)

New output class: ConnectApi.CommerceAddressCollection

Get Commerce account addresses for a webstore account

- getCommerceAccountAddress(webstoreId, accountId, defaultOnly)
- getCommerceAccountAddress(webstoreId, accountId, defaultOnly, addressType, fields, pageToken, pageSize, sortOrder)

New output class: ConnectApi.CommerceAddressCollection

Update a Commerce account address

updateCommerceAccountAddress(webstoreId, accountId, addressId, addressInput)

New input class: ConnectApi.commerceAddressInput

New output class: ConnectApi.CommerceAddressOutput

These new methods are in the ConnectApi.CommerceCart class.

Apply a coupon to a cart

applyCartCoupon(webstoreId, effectiveAccountId, activeCartOrId, cartCouponInput)

New input class: ConnectApi.cartCouponInput

New output class: ConnectApi.CartCouponCollection

Delete a coupon from a cart

• deleteCartCoupon(webstoreId, effectiveAccountId, activeCartOrId, cartCouponId)

Get coupons for a cart

getCartCoupons(webstoreId, effectiveAccountId, activeCartOrId)

New output class: ConnectApi.CartCouponCollection

This new method is in the ConnectApi.CommerceCatalog class.

Get fields, prices, and default images for a list of products

 getProducts(webstoreId, effectiveAccountId, ids, skus, fields, excludeMedia, excludePrices) These new methods are in the ConnectApi.CommerceStorePricing class.

Get the prices for multiple products

- getProductPrices(webstoreId, effectiveAccountId, pricingInput)
- getProductPrices(webstoreId, effectiveAccountId, productIds)

New input class: ConnectApi.PricingInput

Experience Cloud Sites

This new method is in the ConnectApi. NavigationMenu class.

Get navigation menu items for an Experience Cloud site based on an effective account

 getCommunityNavigationMenu(communityId, navigationLinkSetId, navigationLinkSetDeveloperName, publishStatus, includeImageUrl, addHomeMenuItem, menuItemTypesToSkip, effectiveAccountId)

These methods are now generally available in the ConnectApi.MarketingIntegration class.

Get a marketing integration form for an Experience Cloud site

getForm(siteId, formId)

Save a marketing integration form for an Experience Cloud site

saveForm(siteId, formInput)

Submit a marketing integration form for an Experience Cloud site

submitForm(siteId, formId, formSubmissionInput)

Orchestration (Generally Available)

This new method is in the new ConnectApi.Orchestration class.

Get orchestration instances with work items related to a record

getOrchestrationInstanceCollection(relatedRecordId)

New output class: ConnectApi.OrchestrationInstanceCollection

Payments

These new methods are in the ConnectApi.Payments class.

Make a payment sale

• sale(sale)

New input class: ConnectApi.SaleRequest

New output class: ConnectApi.SaleResponse

Confirm that the merchant is ready to capture payment of an existing pre-authorized transaction

postAuth(postAuthorizePayment)

New input class: ConnectApi.PostAuthRequest

New output class: ConnectApi.PostAuthorizationResponse

Salesforce Customer Data Platform (CDP)

These new methods are in the ConnectApi.CdpQuery class.

Get Salesforce CDP metadata with new parameters

getAllMetadata(entityType, entityCategory, entityName)

Query a Salesforce CDP Calculated Insight object within a time range

 queryCalculatedInsights(ciName, dimensions, measures, orderby, filters, batchSize, offset, timeGranularity)

Query a Salesforce CDP Profile data model object and a Calculated Insight object within a time range

 queryProfileApi(dataModelName, id, ciName, searchKey, dimensions, measures, filters, fields, batchSize, offset, orderby, timeGranularity)

Query up to 8 MB of Salesforce CDP data across data model, lake, unified, and linked objects

queryAnsiSqlV2(input)

New response body: ConnectAPI.CdpQueryOutputV2

Get the next batch of Salesforce CDP data across data model, lake, unified, and linked objects

nextBatchAnsiSqlV2(nextBatchId)

New response body: ConnectAPI.CdpQueryOutputV2

Look up Salesforce CDP objects by source ID

 universalIdLookupBySourceId(entityName, dataSourceId, dataSourceObjectId, sourceRecordId)

New response body: ConnectApi.CdpQueryDataOutput

Salesforce Order Management

This new method is in the ConnectApi.Routing class.

Find inventory availability using Omnichannel Inventory and identify the fulfillment routes with fewest splits for an order summary

findRoutesWithFewestSplitsUsingOCI(findRoutesWithFewestSplitsUsingOCIInput)

New input class: ConnectApi.FindRoutesWithFewestSplitsUsingOCIInputRepresentation

New output class: ConnectApi. FindRoutesWithFewestSplitsUsingOCIOutputRepresentation

Site Search and Enhanced CMS Workspaces (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.

These new methods are in the new ConnectApi. ManagedContentDelivery class.

Get a managed content channel

getManagedContentChannel(channelId)

New output class: ConnectApi.ManagedContentChannelDetail

Get a piece of published content for a channel

getManagedContentForChannel(channelId, contentKeyOrId, showAbsoluteUrl)

- getManagedContentForChannel(channelId, contentKeyOrId, language, showAbsoluteUrl)
- getManagedContentForChannel(channelId, contentKeyOrId, language, showAbsoluteUrl, referenceDepth, expandReferences, referencesAsList)

New output class: ConnectApi.ManagedContentDeliveryDocument

Get a piece of published content for an Experience Cloud site

- getManagedContentForSite(siteId, contentKeyOrId, showAbsoluteUrl)
- getManagedContentForSite(siteId, contentKeyOrId, language, showAbsoluteUrl)
- getManagedContentForSite(siteId, contentKeyOrId, language, showAbsoluteUrl, referenceDepth, expandReferences, referencesAsList)

New output class: ConnectApi.ManagedContentDeliveryDocument

This new method is in the new ConnectApi. Sites class.

Search an Experience Cloud site

searchSite(siteId, queryTerm, pageToken, pageSize, language)

New output class: ConnectApi.SiteSearchResult

Changed Connect in Apex Output Classes

This output class has changes.

Salesforce Order Management

ConnectApi.ChangeItemOutputRepresentation

This output class has this new property.

totalRequiredFundsAmount—The required funds associated with added order items.

API: New and Changed Items

Access more data objects and metadata types in API version 54.0.

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.

SOQL

Salesforce Object Query Language (SOQL) has improved results when using the FIELDS () function in queries.

REST AP

REST API includes new actions and the ability to generate an OpenAPI 3.0 specification (Beta).

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Get and delete microbatching errors, and resubmit microbatching error records. Work with marketing integration forms, which are now generally available. Take advantage of Salesforce Customer Data Platform's enhancements. Participate in the Site Search and Enhanced CMS Workspaces beta.

Tableau CRM REST API

Retrieve, create, and update recipe fiscal configurations with the Tableau CRM REST API. Filter source objects using the q parameter.

User Interface API

Clear workspace tabs for each new console session. We added support for more objects.

Bulk APIs

These calls are new, changed, or deprecated in API version 54.0.

Tooling API New and Changed Objects

Clear workspace tabs for each new console session, create flows for Loyalty Management processes, and review custom email notifications sent when a Transaction Security policy is triggered.

Metadata API

Access metadata through these new and changed metadata types.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

Make the in-app guidance prompt appear on any app or any page

On the PromptVersion object, the TargetAppDeveloperName, TargetPageKey1, and TargetPageType fields are now nillable.

B2B Commerce on Lightning Experience

View order summaries for your cart by leveraging out-of-the-box mappings between the cart item and order summary.

Use the mapping from the OrderItem. Description field to the CartItem. Name field.

Apply coupons to Commerce promotions for a webstore.

Use the new Coupon object.

View information about market segment within B2B Commerce that promotions can be assigned to.

Use the new PromotionMarketSegment object.

View the product, product category, or order that you want to target with your promotion qualifier in B2B Commerce.

Use the new PromotionQualifier object.

View a promotion segment, which you can assign to different stores or buyer groups, allowing them to access the promotion.

Use the new PromotionSegment object.

View a promotion segment, associated with a buyer group for B2B Commerce.

Use the new PromotionSegmentBuyerGroup object.

View a promotion segment, associated with a store for B2B Commerce.

Use the new PromotionSegmentSalesStore object.

View the product, product category, or order that you want to target with your promotion in B2B Commerce.

Use the new PromotionTarget object.

Commerce

Identify the pricebook entry associated with an OrderItemSummary

Use the new PricebookEntryId field on the OrderltemSummary object.

Identify the pricebook associated with an OrderSummary

Use the new Pricebook2Id field on the OrderSummary object.

Associate an OrderItemSummaryChange with an added OrderItemSummary

Use the new Add value in the Change Type field of the OrderItem Summary Change object.

Include unadjusted delivery amounts in an OrderSummary

Use the new TotalDeliveryAmount, TotalDeliveryTaxAmount, and TotalDeliveryAmountWithTax fields on the OrderSummary object.

Include unadjusted product amounts in an OrderSummary

Use the new TotalProductAmount, TotalProductTaxAmount, and TotalProductAmountWithTax fields on the OrderSummary object.

Associate a coupon with an adjustment or adjustment group

Use the new AdjustmentBasisReferenceId field on the OrderAdjustmentGroup, OrderAdjustmentGroupSummary, OrderItemAdjustmentLineItem, and OrderItemAdjustmentLineSummary objects.

Understand the access rules for shipment and shipment item records

The Special Access Rules sections of the Shipment and ShipmentItem object reference topics are now accurate.

Customization

Clear workspace tabs for each new console session

Use the new IsNavTabPersistenceDisabled field on the existing AppDefinition object.

Development

Find Apex classes that directly or indirectly implement an interface (Beta)

Use the new ApexTypeImplementor object.

Einstein Automate

View details about a run-time instance of an orchestration (Generally Available)

Use the new FlowOrchestrationInstance object.

View details about a run-time stage in an orchestration instance (Generally Available)

Use the new FlowOrchestrationStageInstance object.

View details about a run-time step in an orchestration stage instance (Generally Available)

Use the new FlowOrchestrationStepInstance object.

View details about a work item associated with an interactive step in an orchestration instance (Generally Available)

Use the new FlowOrchestrationWorkItem object.

View flows created for Loyalty Management processes

Use the new LoyaltyManagementFlow value in the ProcessType field of the FlowDefinitionView object.

View versions of the flows created for Loyalty Management program processes

Use the new LoyaltyManagementFlow value in the ProcessType field of the FlowVersionView object.

Event Monitoring

Identify which connected or remote apps send API requests

Use the new CONNECTED_APP_ID field on the API Total Usage event type. You can use the Connected App ID to better understand where requests are coming from, and identify connected apps that make requests to deprecated API versions.

Experience Cloud

Archive a site

Use the new ArchiveStatus field on the existing Site object.

Process self-registration requests in batches.

Use the new selfRegMicroBatchSubErrorEmailTemplateId field on the existing Network object.

Field Service

Mark shifts and shift templates as nonstandard

Use the new IsNonStandard field on the existing Shift and ShiftTemplate objects.

Color code shifts and shift templates

Use the new BackgroundColor field on the existing Shift and ShiftTemplate objects.

Bundle your service appointments

Use the new ApptBundleAggrDurDnscale, ApptBundleAggrPolicy, ApptBundleConfig, ApptBundlePolicy, ApptBundlePolicySvcTerr, ApptBundleRestrictPolicy, and ApptBundleSortPolicy objects.

Use the new BundlePolicyID, IsBundle, IsBundleMember, IsManuallyBundled, and RelatedBundle fields on the existing ServiceAppointment object.

Industries

Recover funds on an insurance claim

Use the ClaimRecovery object.

Request financial compensation for goods or services provided by a third party

Use the new PaymentRequest object.

Specify line item details for a financial compensation request

Use the new PaymentRequestLine object.

Media

Define the size of an ad creative

Use the new AdCreativeSizeType object.

Define in an ad order the details of an ad placement

Use the new AdOrderItem object.

View quote items specific to Advertising Sales Management

Use the new AdQuote object.

Define the line-item details of an ad quote

Use the new AdQuoteLine object.

Define the platforms to which an ad is delivered

Use the new AdServer object.

Map an account or user to an ad server

Use the AdServerAccount or AdServerUser objects.

Determine the compatibility of an ad space with the size of an ad creative

Use the new AdSpaceCreativeSizeType object.

Define the relationship between an ad space and an ad group

Use the new AdSpaceGroupMember object.

Define where a creative is displayed

Use the new AdSpaceSpecification object.

Allow a creative to be served in multiple spaces at a time

Use the new MediaChannel object.

View details of an event or show in linear programs (TV or radio)

Use the new MediaContentTitle object.

Sales

Track territory assignment changes

Use the getUpdated() and getDeleted() calls with the ObjectTerritory2Association object to determine whether assignments were updated or deleted within a date range.

Get the status of territory assignment rule jobs

Use the new Territory2AlignmentLog object.

Exclude specific accounts from territory assignment rules

Use the new Territory2ObjectExclusion object.

Track sent and received emails separately

Use the new LastEmailSentDateTime and LastEmailReceivedDateTime fields on the ActivityMetric object.

Check the connection status of Einstein Activity Capture users' email and calendar account

Use the new ActivityUsrConnectionStatus object.

Understand which action cadence step generated a list email record

Use the new ActionCadenceStepId field on the ListEmail object.

Understand which action cadence step tracker the list email individual recipient is related to

 $\label{thm:listEmailIndividualRecipient object.} Use the {\tt new ActionCadenceStepTrackerId}\ field on the {\tt ListEmailIndividualRecipient object}.$

Get detailed monthly engagement information for email templates

Use the new EmailTemplateMonthlyMetric object.

Include or Exclude RecordType Data from Opportunity Forecasts

Use the new ForecastingFilter object to create and manage custom filters for Forecast Types.

Learn about the custom filter logic for forecast types

Use the new ForecastingFilterCondition object to define the conditions for including or excluding recordtype data from opportunity forecasts.

Control whether changes in the last 7 days appear on the forecasts page

Use the new IsShowForecastingChangeSignals field on the ForecastingUserPreference object.

Add an action cadence to a folder

Use the new FolderId and FolderName fields on the ActionCadence object. Introduced in API version 49.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

View the state of a call or email branch step rule on an active action cadence

Use the new GraphState field on the ActionCadenceRule object. Introduced in API version 53.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

Find if a call or email step of an action cadence has template variants

Use the new HasVariant field on the ActionCadenceStep object. Introduced in API version 53.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

Find the number of an action cadence within a sequence of linked action cadences followed by a target

Use the new DaisyChainIteration field on the ActionCadenceTracker object. Introduced in API version 53.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

Find out whether an action cadence target has a related opportunity

Use the new RelatedToId and RelatedToAttributionType fields on the ActionCadenceTracker object. Introduced in API version 51.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

Find out when action cadence target is going to resume after it's paused or on a wait step

Use the ScheduledResumeDateTime field on the ActionCadenceTracker object. Introduced in API version 32.0, this object has been added to the <cite>New and Changed Objects Developer Guide</cite>.

Salesforce Scheduler

Specify hours or days when a service territory is non-operational

Use the new OperatingHoursHoliday object.

Security, Identity, and Privacy

Review custom email notifications sent when a Transaction Security policy is triggered

Use the new CustomEmailContent field on the existing TransactionSecurityPolicy object.

Configure single sign-on and third-party data access with a Slack authentication provider

Use the new Slack value in the ProviderType field on the existing AuthProvider object.

Track and monitor Data Subject Access Requests in Privacy Center

Use the new PrivacyRequest object.

Monitor changes to Security Health Check baseline

Use the new TenantSecurityHealthCheckBaselineTrend object.

Store metrics describing changes to Mobile Security Policies

Use the new TenantSecurityMobilePolicyTrend object.

Store Security Center notifications

Use the new TenantSecurityNotification object.

Store information about Security Center policies

Use the new TenantSecurityPolicy object.

Track updates to Security Center policies

Use the new TenantSecurityPolicyChangeLog object.

Track the status of deployments for Security Center policies

Use the new TenantSecurityPolicyDeployment object.

Store Security Center tenant selections for specific policies

Use the new TenantSecurityPolicySelectedTenant object.

Service

Learn about historical adherence in Workforce Engagement

Use the new SchedulingAdherenceDetail and SchedulingAdherenceSummary objects.

Route learning modules to agents in Workforce Engagement

Use the new PersonTraining object that replaces the AgentTraining object.

Assign a Trailhead or myTrailhead module to an agent.

Use the new LearningContent object.

Create long-term and short-term capacity plans in Workforce Engagement

Use the new PlanType field in the WorkforceCapacity object.

Learn the staffing prediction for a capacity plan in Workforce Engagement

Use the new Capacity field in the WorkforceCapacityUnit object. Use the value 43200 (monthly) in the existing MeasureUnit field for a long-term capacity plan.

Limit monthly non-standard shifts for each agent in Workforce Engagement

Use the new MaxNonstandardShiftsPerMonth field in the SchedulingConstraint object.

Enable autogreetings when transferring to an agent or adding an agent to a conference chat

Use the new HasTransferConferenceGreeting and OptionsHasTransferConferenceGreeting fields in the LiveChatUserConfig object.

Create or find objects in chat

Use the new LiveChatObjectAccessConfig and LiveChatObjectAccessDefinition objects.

Map a call center vendor agent status to a Salesforce presence status in Service Cloud Voice

Use the new VendorCallCenterStatusMap object.

Determine which queues are visible to supervisors in Omni Supervisor

Use the new OmniSupervisorQueue object.

Determine which skills are visible to supervisors in Omni Supervisor

Use the new OmniSupervisorSkill object.

Hide agent timelines from supervisors in Omni Supervisor

Use the new IsTimelineHidden field on the existing OmniSupervisorCofig object.

Set the threshold of work items to display in Omni Supervisor based on skill requirements

Use the new SkillVisibility field on the existing OmniSupervisorCofig object.

BEHAVIOR CHANGE: The JobName field on the ServiceSetupAssistant object is now a string type.

The job name represents the name of a group of tasks completed by the Service Setup Assistant. Previously, the JobName field was of type picklist.

BEHAVIOR CHANGE: The TaskName field on the ServiceSetupAssistant object is now a string type.

The task name represents the name of the task completed by the Service Setup Assistant. Previously, the TaskName field was of type picklist.

Add recordset filter criteria to maintenance work rules

Use the new RecordsetFilterCriteriald field on the existing MaintenanceWorkRule object. This field was introduced in API version 52.0 and has been added to the Object Reference quide.

Define the type of maintenance work rule

Use the new Type field on the existing MaintenanceWorkRule object. This field was introduced in API version 52.0 and has been added to the Object Reference guide.

Understand which fields in the VoiceCall object impact which feature

Use the updated VoiceCall object reference document to understand which fields in the VoiceCall object apply to the Sales Dialer versus Service Cloud Voice feature.

Manage service incidents

Use the updated ChangeRequest, Incident, and Problem object reference documents to track and diagnose service interruptions.

IN THIS SECTION:

Retired Objects

These objects are retired.

Retired Objects

These objects are retired.

GoalHistory is retired

GoalHistory and the GoalHistory API object are no longer available.

GoalOwnerSharingRule is retired

GoalOwnerSharingRule and the GoalOwnerSharingRule API object are no longer available.

WorkGoalCollaboratorHistory is retired

WorkGoalCollaboratorHistory and the WorkGoalCollaboratorHistory API object are no longer available.

WorkGoalHistory is retired

WorkGoalHistory and the WorkGoalHistory API object are no longer available.

WorkGoalOwnerSharingRule is retired

WorkGoalOwnerSharingRule and the WorkGoalOwnerSharingRule API object are no longer available.

Metric is retired

Metric and the Metric API object are no longer available.

MetricDataLinkHistory is retired

MetricDataLinkHistory and the MetricDataLinkHistory API object are no longer available.

MetricHistory is retired

MetricHistory and the MetricHistory API object are no longer available.

MetricOwnerSharingRule is retired

MetricOwnerSharingRule and the MetricOwnerSharingRule API object are no longer available.

WorkAccessOwnerSharingRule is retired

WorkAccessOwnerSharingRule and the WorkAccessOwnerSharingRule API object are no longer available.

WorkCoachingHistory is retired

WorkCoachingHistory and the WorkCoachingHistory API object are no longer available.

WorkCoachingOwnerSharingRule is retired

WorkCoachingOwnerSharingRule and the WorkCoachingOwnerSharingRule API object are no longer available.

WorkRewardFundHistory is retired

WorkRewardFundHistory and the WorkRewardFundHistory API object are no longer available.

WorkRewardFundOwnerSharingRule is retired

WorkRewardFundOwnerSharingRule and the WorkRewardFundOwnerSharingRule API object are no longer available.

WorkRewardFundTypeHistory is retired

WorkRewardFundTypeHistory and the WorkRewardFundTypeHistory API object are no longer available.

$Work Reward Fund Type Owner Sharing Rule is \ retired$

WorkRewardFundTypeOwnerSharingRule and the WorkRewardFundTypeOwnerSharingRule API object are no longer available.

WorkRewardHistory is retired

WorkRewardHistory and the WorkRewardHistory API object are no longer available.

WorkRewardOwnerSharingRule is retired

WorkRewardOwnerSharingRule and the WorkRewardOwnerSharingRule API object are no longer available.

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.

Einstein Automate

Track when a running orchestration is ready to be resumed (Generally Available)

Subscribe to FlowOrchestrationEvent to receive notifications when a running instance of an orchestration is ready to be resumed.

SOQL

Salesforce Object Query Language (SOQL) has improved results when using the FIELDS () function in queries.

Changes

The FIELDS () function now returns reliable results when used in query statements written in Apex.

Previously, the FIELDS () function threw an error when used in Apex under certain conditions. Now, FIELDS () returns results consistent with the org when included in any query statement. This change is available by default in all orgs.

SEE ALSO:

Salesforce Object Query Language Developer Guide: FIELDS()

REST API

REST API includes new actions and the ability to generate an OpenAPI 3.0 specification (Beta).

Generating an OpenAPI 3.0 Specification for sObject REST API (Beta)

With this feature you can generate an OpenAPI specification that describes four sObjects API resources customized for your objects. With an OpenAPI specification you can quickly set up integrations with Salesforce, and it serves as a single source of truth for Salesforce REST resources.

Where: This change applies to Developer and Partner Developer editions. It is available in sandboxes and scratch orgs that have API Enabled.



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 use this feature, you must enable the **Enable Salesforce Platform REST API, OpenAPI 3.0 Spec Generation (Beta)** setting on the User Interface page in Setup. See Generating an OpenAPI 3.0 Specification for sObjects REST API (Beta) in the *Lightning Platform REST API Developer Guide*.

Notes For Users of the Earlier Pilot Version:

- You must now use API version 54.0 or later to generate the specification.
- This beta version of the specification now exposes more field types.
 - In the pilot, picklist values were returned as objects. For example:

```
"Format": {
    "type": "object",
    "description": "Required. Indicates ...
}
```

They're now returned as strings. For example:

```
"Format": {
    "type": "string",
    "description": "Required. Indicates ...
}
```

(To determine the allowed values of the picklist, use sObject Describe.)

In the pilot, date and date-time fields were described as objects. For example:

```
"ConsentCapturedDateTime": {
    "type": "object",
    "description": "Required. The date and time that consent was given."
}
```

They're now returned as strings and have additional format information. For example:

```
"ConsentCapturedDateTime": {
    "type": "string",
    "format": "date-time",
    "description": "Required. The date and time that consent was given."
}
```

SEE ALSO:

External Link: Ability to Generate OpenAPI Docs for REST-ful Integration

Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs. Invocable actions are available through REST API

The following action has been added:

Find inventory availability using Omnichannel Inventory and identify the fulfillment routes with fewest splits for an order summary

Use the new orderRoutingFindRoutesWithFewestSplitsUsingOCl action. This action combines the existing ociGetAvailability and orderRoutingFindRoutesWithFewestSplits actions.

For more information on invocable actions, see the Actions Developer Guide.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Get and delete microbatching errors, and resubmit microbatching error records. Work with marketing integration forms, which are now generally available. Take advantage of Salesforce Customer Data Platform's enhancements. Participate in the Site Search and Enhanced CMS Workspaces beta.

IN THIS SECTION:

New and Changed Connect REST API Resources

These resources are new or have changes.

Changed Connect REST API Request Bodies

This request body has 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 7.0 Through 20.0 will be retired in Summer '22

New and Changed Connect REST API Resources

These resources are new or have changes.

B2B Commerce on Lightning Experience

Get the prices for multiple products for a webstore

Make a GET request to the /commerce/webstores/webstoreId/pricing/products resource.

Required request parameter: productIds

Apply a coupon code to a cart

Make a POST request to the /commerce/webstores/webstoreId/carts/cartStateOrId/cart-coupons resource.

New request body: Cart Coupon Input

New response body: Cart Coupon Collection

Get coupons associated with a cart

Make a GET request to the /commerce/webstores/webstoreId/carts/cartStateOrId/cart-coupons resource.

New response body: Cart Coupon Collection

Delete a coupon from a cart

Make a DELETE request to the

/commerce/webstores/webstoreId/carts/cartStateOrId/cart-coupons/cartCouponId resource.

Get fields, prices, and default images for a list of products for a webstore

Make a GET request to the /commerce/webstores/webstoreId/products resource.

New response body: Product Overview Collection

Get sort rules for a webstore

 $\label{lem:makeaGET} \textit{MakeaGET} \textit{request} \textit{tothe} \textit{new} \textit{/commerce/management/webstores} \textit{/} \textit{\textit{webstoreId}} \textit{/} \textit{search/sort-rules} \textit{resource}.$

Create sort rules for a webstore

Make a PUT request to the new /commerce/management/webstores/webstoreId/search/sort-rules resource.

New request body: Sort Rules Collection Input

Delete an address for a Commerce account associated with a webstore

Make a DELETE request to the new

/commerce/webstores/webstoreId/accounts/accountId/addresses/addressId resource.

Update an address for a Commerce account associated with a webstore

Make a PATCH request to the new

/commerce/webstores/webstoreId/accounts/accountId/addresses/addressId resource.

New request body: Commerce Address Input

New response body: Commerce Address

Create a Commerce account address for a webstore account

Make a POST request to the /commerce/webstores/webstoreId/accounts/accountId/addresses resource.

New request body: Commerce Address Input

New response body: Commerce Address

Get a collection of addresses for a webstore account

Make a GET request to the /commerce/webstores/webstoreId/accounts/accountId/addresses resource.

New response body: Commerce Address Collection

Briefcase Builder

Get a list of records related to an offline briefcase

Make a GET request to the new /connect/briefcase/priming-records resource.

New response body: Priming Record Collection

Experience Cloud Sites

Get navigation menu items for an Experience Cloud site based on an effective account

Make a GET request to the

/connect/communities/communityId/navigation-menu/navigation-menu-items resource.

New request parameter: effectiveAccountId

Get microbatching errors

Make a GET request to the new /connect/microbatching/errors resource.

Required request parameter: processType

New response body: Microbatching Error Record Info Collection

Delete microbatching errors

Make a DELETE request to the new /connect/microbatching/errors resource.

Required request parameter: processType

Resubmit microbatching error records

 $\label{lem:make} \textit{Make a POST request to the new /connect/microbatching/errors/resubmission resource}.$

Required request parameter: processType

New response body: Microbatching Error Resubmission

Experience Cloud Microsites (Generally Available)

Get a marketing integration form for an Experience Cloud site

Make a GET request to the /sites/**siteId**/marketing-integration/forms/**formId** resource.

Save a marketing integration form for an Experience Cloud site

Make a POST request to the /sites/siteId/marketing-integration/forms resource.

Submit a marketing integration form for an Experience Cloud site

Make a POST request to the /sites/siteId/marketing-integration/forms/formId/data resource.

Orchestration (Generally Available)

Get 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: Orchestration Instance Collection

Payments

Make a payment sale

Make a POST request to the new /commerce/payments/sales resource.

New request body: Sale Input

New response body: Sale Output

Confirm that the merchant is ready to capture payment of an existing pre-authorized transaction

Make a POST request to the new /commerce/payments/postAuths resource.

New request body: Post Auth Input

New response body: Post Auth Output

Salesforce Customer Data Platform (CDP)

Get Salesforce CDP metadata with new query parameters

Make a GET request to the /ssot/metadata resource.

New request parameters: entityCategory, entityName, entityType

Query a Salesforce CDP Calculated Insight object within a time range

 $\label{lem:make_aGET_request} \mbox{Make a GET request to the } / \mbox{ssot/insight/calculated-insights} / \mbox{\it calculatedInsightName} \mbox{\it resource}.$

New request parameter: timeGranularity

Query a Salesforce CDP Profile data model object and a Calculated Insight object within a time range

Make a GET request to the

 $/ \texttt{ssot/profile} / \textbf{\textit{data}ModelName} / \textbf{\textit{id}} / \texttt{calculated-insights} / \textbf{\textit{calculatedInsightName}} \text{ resource.}$

New request parameter: timeGranularity

Query up to 8 MB of Salesforce CDP data across data model, lake, unified, and linked objects

Make a POST request to the new /ssot/queryv2 resource.

New response body: Salesforce CDP Query Output V2

Get the next batch of Salesforce CDP data across data model, lake, unified, and linked objects

Make a GET request to the new /ssot/queryv2/nextBatchId resource.

New response body: Salesforce CDP Query Output V2

Look up Salesforce CDP objects by source ID

Make a GET request to the new

 $/ \texttt{ssot/universalIdLookup/} \textbf{\textit{entityName/dataSourceId/dataSourceObjectId/sourceRecordId} resource. \\$

New response body: Salesforce CDP Query Data Output

Salesforce Order Management

Find inventory availability using Omnichannel Inventory and identify the fulfillment routes with fewest splits for an order summary

Make a POST request to the new

/commerce/order-management/routing/actions/find-routes-with-fewest-splits-using-oci

New request body: Find Routes With Fewest Splits Using OCI Input

New response body: Find Routes With Fewest Splits Using OCI Output

Site Search and Enhanced CMS Workspaces (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.

Get a managed content channel

Make a GET request to the new /connect/cms/delivery/channels/channelId resource.

New response body: Managed Content Channel Detail

Get a piece of published content for a channel

Make a GET request to the new /connect/cms/delivery/channels/channelId/contents/contentKeyOrId resource.

New response body: Managed Content Delivery Document

Get a piece of published content for an Experience Cloud site

 $\label{lem:makeaGET} \textit{Make a GET request to the new /connect/sites/\textbf{\textit{siteId}}/cms/delivery/contents/\textbf{\textit{contentKeyOrId}} \ \textit{resource}.$

New response body: Managed Content Delivery Document

Specify a language when getting the binary stream of a media node of published content in a channel

Make a GET request to the /connect/cms/delivery/channels/channelId/media/mediaGUID/content resource.

New request parameter: language

Get the latest live and non-live search indexes for a channel

Make a GET request to the new /connect/cms/channels/channelId/search/indexes resource.

New response body: Managed Content Search Indexes

Trigger search indexing for a channel

Make a POST request to the new /connect/cms/channels/channelId/search/indexes resource.

New response body: Managed Content Search Index

Create managed content

Make a POST request to the new /connect/cms/contents resource.

New request body: Managed Content Input

New response body: Managed Content Document

Get a managed content variant

Make a GET request to the new /connect/cms/contents/variants/variantId resource.

New response body: Managed Content Variant

Update a managed content variant

Make a PUT request to the new /connect/cms/contents/variants/variantId resource.

New request body: Managed Content Variant Input

New response body: Managed Content Variant

Search an Experience Cloud site

Make a GET request to the new /connect/sites/siteId/search resource.

New required request parameter: queryTerm

New response body: Site Search Result

Changed Connect REST API Request Bodies

This request body has changes.

Experience Cloud Sites

Community Input

This request body has this changed property.

- templateParams—These new values support B2B and B2C store templates.
 - "CreateStoreDefaults": "ALL"
 - "CreateStoreDefaults": "NONE"

Changed Connect REST API Response Bodies

These response bodies have changes.

B2B Commerce on Lightning Experience and B2B2C Commerce

Commerce Einstein Configuration

This response body has these new properties.

- catalogExists—Specifies if the storefront catalog has been deployed and has finished uploading successfully (true) or not (false).
- isDeployed—Specifies if Commerce Einstein has been deployed successfully (true) or not (false).

Salesforce Order Management

Change Item Output

This response body has this new property.

totalRequiredFundsAmount—The required funds associated with added order items.

Service Cloud Einstein

Reply Recommendations Metric

This response body has this new property.

• predictionsCount—Number of times recommendations are displayed to agents.

Tableau CRM REST API

Retrieve, create, and update recipe fiscal configurations with the Tableau CRM REST API. Filter source objects using the q parameter.

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 collection of recipe configurations

Make a GET request to the new /wave/recipe-configurations resource.

New response body: Recipe Configuration Collection

Update a collection of recipe configurations

Make a GET request to the new /wave/recipe-configurations resource.

New required request parameter: recipeConfigurations

New response body: Recipe Configuration Collection

Create a recipe configuration

Make a POST request to the new /wave/recipe-configurations resource.

New required request parameter: recipeConfiguration

New response body: Recipe Configuration

Get a recipe configuration

Make a GET request to the new /wave/recipe-configurations/id resource.

New response body: Recipe Configuration

Update a recipe configuration

Make a PATCH request to the new /wave/recipe-configurations/id resource.

New required request parameter: recipeConfiguration

New response body: Recipe Configuration

Get a collection by label

Make a GET request to the /wave/collections resource.

New request parameter: label

Get source objects using the search filter

Make a GET request to the /wave/dataConnectors/connectorIdOrApiName/sourceObjects resource.

New request parameter: q

Get subscriptions by type

Make a GET request to the /wave/subscriptions resource.

New request parameter: type

Use a Time Series V2 Node in a recipe

Make a GET request to the /wave/recipes/id resource.

Response body includes new Time Series V2 Node and Time Series V2 Parameters representations.

Use an Update Node in a recipe

Make a GET request to the /wave/recipes/id resource.

Response body includes new Update Node and Update Parameters representations.

Changed Tableau CRM REST API Request Bodies

These request bodies have changes.

Aggregate Flex Query Step Input

The request body has this new property.

• cdpObject—The name of the CDP object used for the step.

Auto-Install App Configuration Input

The request body has these new properties.

- appDescription—The description for the Tableau CRM app.
- appLabel—The label for the Tableau CRM app.
- appName—The developer name for the Tableau CRM app.
- licenseAttributes—The license type to use when creating the Tableau CRM app with auto-install. Honored only for WaveAppCreate requests.

Column Parameters Bar Input

The request body has this new property.

width—The column width.

Column Parameters Text Input

The request body has this new property.

width—The column width.

Date Selector Widget Parameters Input

The request body has this new property.

customFilterPresets—The list of custom preset filters.

Dashboard Subscription Source Input

The request body has this new property.

savedView—The saved view used in the dashboard subscription schedule.

Detect Sentiment Parameters Input

The request body has these new properties.

- outputType—The output type. Valid values are Dimension and Measure.
- sentimentScore—The sentiment score option. Valid values are All and None.
- targetSentimentScoreFields—A map of name and value pairs for the target sentiment score field.

Output External Parameters Input

The request body has this new property.

• hyperFileName—The name of the hyper file.

Post to Slack Notification Action Configuration Input

The request body has this new property.

• excludeSnapshot—Indicates whether a dashboard snapshot is excluded in the subscription (true) or not (false).

Repeater Widget Card Properties Input

The request body has this new property.

• selectedStyles—The styling for the selected card of the repeater widget.

Repeater Widget Parameters Input

The request body has this new property.

• exploreLink—Indicates whether the explorer link is displayed (true) or not (false).

Table Widget Cell Parameters Input

The request body has this new property.

textWrap—Indicates whether text wrapping is allowed for the cell (true) or not (false).

Template Input

The request body has this new property.

assetVersion—The asset version to set for the template. Only used on template PUT.

Template Options Input

The request body has this new property.

dynamicOptions— A map of dynamic (beta) options for app construction.

Changed Tableau CRM REST API Response Bodies

These response bodies have changes.

Aggregate Flex Step

The response body has this new property.

• cdpObject—The name of the CDP object used for the step.

Column Parameters Bar

The response body has this new property.

width—The column width.

Column Parameters Text

The response body has this new property.

• width—The column width.

Date Selector Widget Parameters

The response body has this new property.

• customFilterPresets—The list of custom preset filters.

Dashboard Subscription Source

The response body has this new property.

savedView—The saved view used in the dashboard subscription service.

Detect Sentiment Parameters

The response body has these new properties.

- outputType—The output type. Valid values are Dimension and Measure.
- sentimentScore—The sentiment score option. Valid values are All and None.
- targetSentimentScoreFields—A map of name and value pairs for the target sentiment score field.

Output External Parameters

The response body has this new property.

• hyperFileName—The name of the hyper file.

Post to Slack Notification Action Configuration

The response body has this new property.

• excludeSnapshot—Indicates whether a dashboard snapshot is excluded in the subscription (true) or not (false).

Recipe Notification

The response body has this new property.

• recipe—The recipe that the notification belongs to.

Recipe

The response body has this new property.

• status—The status of the recipe. Valid values are Failure, New, Queued, Running, Success, and Warning.

Repeater Widget Card Properties

The response body has this new property.

• selectedStyles—The styling for the selected card of the repeater widget.

Repeater Widget Parameters

The response body has this new property.

• exploreLink—Indicates whether the explorer link is displayed (true) or not (false).

Replicated Dataset

The response body has this new property.

• uuid—The unique identifier of the source object.

Table Widget Cell Parameters

The response body has this new property.

• textWrap—Indicates whether text wrapping is allowed for the cell (true) or not (false).

Template Options

The response body has this new property.

• dynamicOptions— A map of dynamic (beta) options for app construction.

Wave Features

The response body has these new properties.

- orgHasAppFramework3—Indicates whether the org has the App Framework 3.0 enabled (true) or not (false).
- orgHasCustomFiscal—Indicates whether the org has custom fiscal year for data prep enabled (true) or not (false).
- orgHasRecipeFiscal—Indicates whether the org has recipe fiscal year for enabled (true) or not (false).

User Interface API

Clear workspace tabs for each new console session. We added support for more objects.

Clear workspace tabs for each new console session

Use the new isNavTabPersistenceDisabled property on the App response body.

Supported Objects

These objects are now supported by most User Interface API resources. We note in parentheses where support was added in a previous release but not listed in the release notes for that release.

- AdSpaceGroupMember (support added in Winter '22)
- AdSpaceSpecification (support added in Winter '22)
- BackgroundOperation
- BillingBatchFilterCriteria (support added in Winter '22)
- BillingBatchScheduler (support added in Winter '22)
- BillingPeriodItem (support added in Summer '21)
- BillingScheduleGroup (support added in Summer '21)
- BundledCareFeeAgreement
- CapitationCareFeeAgreement
- CareFeeScheduleItem
- CaseParticipant
- CaseServicePlan
- CategorizedCareFeeAgreement
- ClaimRecovery
- ComplaintParticipant
- ContractDocVerContentDoc
- ContractGroupPlan
- ContractPaymentAgreement
- ContractType
- ContractTypeConfig
- Coupon
- CourtAction
- CourtActionOutcome
- DocumentEnvelope
- FeeScheduleDefinition
- FinancialDealAsset
- FinancialDealBid
- GoalDefinition
- GroupCensus

- GroupCensusMember
- GroupClass
- GroupClassContribution
- Incident
- InsuranceContract
- InterestTag
- LoyaltyPgmPtnrPrepaidPack
- ManufacturingProgram
- MedReconRecommendation
- MedReconStmtRecommendation
- MedicationDispense
- MedicationReconciliation
- MedicationStatementDetail
- OmniProcessAsmtQuestionVer
- Organization
- PaymentBatchRunCriteria (support added in Winter '22)
- PaymentGatewayProvider
- PaymentRequest
- PaymentRequestLine
- PercentileBsdCareFeeAgreement
- PreventiveCareAgreement
- ProrationPolicy
- PublicApplicationParticipant
- PublicServiceGoal
- RebateMemberAggregateItem
- SalesContractLine
- ServicePlanTemplate
- ServicePlanTemplateBenefit
- ServicePlanTemplateGoal
- SharedSavingPaymentAgreement
- Skil
- StandardCareFeeAgreement
- TagCategory
- TagCategoryAssignment
- TaxEngineProvider
- TimelineObjectDefinition
- TopicAssignment
- UserEsignVendorldentifier
- VolunteerProject
- WorkTypeCareSpecialty

List views resources now support these objects. We note in parentheses where support was added in a previous release but not listed in the release notes for that release.

- AdSpaceSpecification (support added in Winter '22)
- BackgroundOperation
- BillingBatchFilterCriteria (support added in Winter '22)
- BillingBatchScheduler (support added in Winter '22)
- BundledCareFeeAgreement
- CapitationCareFeeAgreement
- CareFeeScheduleItem
- CaseParticipant
- CaseServicePlan
- CategorizedCareFeeAgreement
- ClaimRecovery
- ComplaintParticipant
- ContractDocVerContentDoc
- ContractGroupPlan
- ContractPaymentAgreement
- CourtAction
- CourtActionOutcome
- DocumentEnvelope
- FeeScheduleDefinition
- FinancialDealAsset
- FinancialDealBid
- GoalDefinition
- GroupCensus
- GroupCensusMember
- GroupClass
- GroupClassContribution
- InsuranceContract
- InterestTag
- MedReconRecommendation
- MedReconStmtRecommendation
- MedicationDispense
- MedicationReconciliation
- MedicationStatementDetail
- OmniProcessAsmtQuestionVer
- PaymentBatchRunCriteria (support added in Winter '22)
- PaymentGatewayProvider
- PaymentRequest
- PaymentRequestLine

- PercentileBsdCareFeeAgreement
- PreventiveCareAgreement
- ProrationPolicy
- PublicApplicationParticipant
- PublicServiceGoal
- RebateMemberAggregateItem
- SalesContractLine
- ServicePlanTemplate
- ServicePlanTemplateBenefit
- ServicePlanTemplateGoal
- SharedSavingPaymentAgreement
- StandardCareFeeAgreement
- TagCategory
- TagCategoryAssignment
- TaxEngineProvider
- TimelineObjectDefinition
- UserEsignVendorldentifier
- VolunteerProject
- WorkTypeCareSpecialty

Most recently used (MRU) list views resources now support these objects. We note in parentheses where support was added in a previous release but not listed in the release notes for that release.

- AdSpaceSpecification (support added in Winter '22)
- BackgroundOperation
- BillingBatchFilterCriteria (support added in Winter '22)
- BillingBatchScheduler (support added in Winter '22)
- BundledCareFeeAgreement
- CapitationCareFeeAgreement
- CareFeeScheduleItem
- CaseParticipant
- CaseServicePlan
- CategorizedCareFeeAgreement
- ClaimRecovery
- ComplaintParticipant
- ContractDocVerContentDoc
- ContractGroupPlan
- ContractPaymentAgreement
- CourtAction
- CourtActionOutcome
- DocumentEnvelope
- FeeScheduleDefinition

- FinancialDealAsset
- FinancialDealBid
- GoalDefinition
- GroupCensus
- GroupCensusMember
- GroupClass
- GroupClassContribution
- InsuranceContract
- InterestTag
- MedReconRecommendation
- MedReconStmtRecommendation
- MedicationDispense
- MedicationReconciliation
- MedicationStatementDetail
- OmniProcessAsmtQuestionVer
- PaymentBatchRunCriteria (support added in Winter '22)
- PaymentRequest
- PaymentRequestLine
- PercentileBsdCareFeeAgreement
- PreventiveCareAgreement
- ProrationPolicy
- PublicApplicationParticipant
- PublicServiceGoal
- RebateMemberAggregateItem
- SalesContractLine
- ServicePlanTemplate
- ServicePlanTemplateBenefit
- ServicePlanTemplateGoal
- SharedSavingPaymentAgreement
- StandardCareFeeAgreement
- TagCategory
- TagCategoryAssignment
- TimelineObjectDefinition
- UserEsignVendorldentifier
- VolunteerProject
- WorkTypeCareSpecialty

Bulk APIs

These calls are new, changed, or deprecated in API version 54.0.

Use Seven New PK-Chunking Enabled Objects with Bulk API and Bulk API 2.0

Extended coverage across more objects improves query performance. You can now request PK chunking for Bulk API queries for these objects. Bulk API 2.0 makes the request automatically.

- ChangeRequest
- Incident
- Order
- Orderltem
- Problem
- WorkPlan
- WorkPlanTemplate

For a complete list of PK-chunking supported objects, see the Salesforce Developer Documentation.

Salesforce Bulk API 2.0 and Bulk API Developer Guide: PK Chunking Header

Salesforce Bulk API 2.0 and Bulk API Developer Guide: How Requests Are Processed

New Troubleshooting Timeouts Topics for Bulk API 2.0 Documentation

Get help fixing timeout issues with Bulk API 2.0. The Spring '22 Bulk API 2.0 documentation includes these new topics.

Salesforce Bulk API 2.0 and Bulk API Developer Guide: Troubleshooting Ingest Timeouts

Salesforce Bulk API 2.0 and Bulk API Developer Guide: Troubleshooting Query Timeouts

Tooling API New and Changed Objects

Clear workspace tabs for each new console session, create flows for Loyalty Management processes, and review custom email notifications sent when a Transaction Security policy is triggered.

Customization

Clear workspace tabs for each new console session

Use the new IsNavTabPersistenceDisabled field on the CustomApplication object.

Development

Filter a stream of platform events in a custom channel (Beta)

Use the new FilterExpression field on the PlatformEventChannelMember object to specify filter criteria for platform event delivery.

Einstein Automate

Create flows for Loyalty Management processes

Use the new value LoyaltyManagementFlow in the ProcessType field on the Flow object.

Security and Identity

Review custom email notifications sent when a Transaction Security policy is triggered

Use the new CustomEmailContent field on the existing TransactionSecurityPolicy object.

Service

Create catalog items, catalog categories, and fulfillment flows for Service Catalog

Introduced in API version 53.0, use the new SvcCatalogCategory, SvcCatalogCategoryltem, SvcCatalogFulfillFlowItem, SvcCatalogFulfillmentFlow, and SvcCatologItemDef objects.

Metadata API

Access metadata through these new and changed metadata types.



Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Salesforce Overall

Add alt text for a prompt's image

Use the imageAltText field on the PromptVersionTranslation subtype of the Translations metadata type. Introduced in API version 53.0, this field has been added to the *Metadata API Developer Guide*.

Insert a URL for a prompt's image

Use the imageLink field on the PromptVersionTranslation subtype of the Translations metadata type and the PromptVersion subtype of the Prompt metadata type. Introduced in API version 53.0, this field has been added to the Metadata API Developer Guide.

Commerce

Find inventory availability using Omnichannel Inventory and identify the fulfillment routes with fewest splits for an order summary

Use the new orderRoutingFindRoutesWithFewestSplitsUsingOCI value in the existing actionType field on the FlowActionCall subtype of the Flow metadata type.

Add order item summaries to an order summary

Use the new addOrderItemSummarySubmit value in the existing actionType field on the FlowActionCall subtype of the Flow metadata type.

This action is only available in flows. Don't call it via REST API.

Enable cloud-to-cloud communication between Order Management and B2C Commerce

Use the existing enableB2CSelfService field on the OrderManagementSettings metadata type.

The setting label in Setup has changed from **B2C Self-Service** to **B2C Commerce Connection**.

Customization

Filter out nonsupported External Services schema operations from your registration

Use the new ExternalServicesSettings metadata type.

Clear workspace tabs for each new console session

Use the new isNavTabPersistenceDisabled field on the CustomApplication metadata type.

Development

Filter a stream of platform events in a custom channel (Beta)

Use the new filterExpression field on the PlatformEventChannelMember metadata type to specify filter criteria for platform event delivery.

Einstein

Provide support to segmentation use cases by setting a priority score

Use the priority field on the existing MLPredictionDefinition metadata type.

Create a label that identifies the ML prediction definition

Use the masterLabel field on the existing MLPredictionDefinition metadata type.

Create a name for the developer on the parent application

Use the aiApplicationDeveloperName field on the existing AlApplicationCongif metadata type.

Einstein Automate

Create flows for Loyalty Management program processes

Use the new LoyaltyManagementFlow value in the processType field on the Flow metadata type. For more information, see Launch Flows for Transactions.

Create choices based on record collections

Use the new collectionReference field on the FlowDynamicChoiceSet subtype of the Flow metadata type.

• To define the type of collection, use the new dataType value, record.

Create orchestrations with Flow (Generally Available)

Use the new Orchestrator value in the processType field on the Flow metadata type. For more information, see Orchestrator (Generally Available).

Manage a step in a stage in an orchestration (Generally Available)

Use the new FlowStageStep metadata type.

Manage a collection of steps within a stage in an orchestration (Generally Available)

Use the new FlowOrchestratedStage metadata type.

Manage a user, queue, or public group assigned to complete an assigned interactive step in an orchestration (Generally Available)

Use the new FlowStageStepAssignee metadata type.

Run flows in user context via REST API

Use the new enableFlowViaRestUsesUserCtxt field on the FlowSettings metadata type. For more information, see Run Flows in User Context via REST API (Release Update).

Filter items into a flow collection

Use these new fields and values on the FlowCollectionProcessor subtype of the Flow metadata type.

- To filter items in a collection, use the new FilterCollectionProcessor value in the FlowCollectionProcessorType field.
- To define how a collection is filtered, use the new conditionLogic field.
- To filter a collection with a list of conditions, use the new conditions field. You must also set conditionLogic to and, or, or custom logic such as 1 and (2 or 3).
- To filter a collection with a formula, use the new formula field. You must also set conditionLogic to formula.

Define the run order of record-triggered flows

Use the new triggerOrder field on the Flow metadata type.

Manage Slack conversations and users (beta)

Use the new values in the actionType field on the Flow metadata type.

- slackCheckUsersAreConnectedToSlack
- slackArchiveChannel

- slackCreateChannel
- slackUpdateMessage
- slackGetConversationInfo
- slackInviteUsersToChannel
- slackPinMessage
- slackPostMessage

For more information, see Manage Conversations and Users in Slack with Invocable Actions (Beta).

Experience Cloud

Archive a site

Use the new SitesArchiveStatus field on the existing Network metadata type.

Process self-registration requests in batches

Use the new selfRegMicroBatchSubErrorEmailTemplate field on the existing Network metadata type.

Field Service

Send mobile app feedback to your admin

Use the new mobileFeedbackEmails field on FieldServiceSettings.

Turn off deep link security warnings in the Field Service mobile app

Use the new deepLinkPublicSecurityKey field on FieldServiceSettings.

Pardot

Sales

Enable the Pipeline Inspection Flow Chart

Use the new enablePipelineInspectionFlow field on the OpportunitySettings metadata type.

Turn on Revenue Insights dashboards and analytics

Use the enableRevenueInsights field on the OpportunitySettings metadata type.

Prevent sensitive emails and automated email replies from being shared

Use the new sensitiveEmailFilter and automatedEmailFilter fields on the EACSettings metadata type.

Set Extended Mail Merge settings

In API version 51.0, the Extended Mail Merge fields enableExtendedMailMerge and saveMailMergeDocsAsSalesforceDocs were moved from the metadata type OrgSettings to the new metadata type MailMergeSettings. These updates have been added to the Metadata API Developer Guide.

Salesforce CDP

Set data kit content details

Use the new reference object fields referenceObjectName and referenceObjectType on the existing DataPacketKitObject metadata type. Introduced in API version 53.0, these fields have been added to the *Metadata API Developer Guide*.

Add information about a data source

Use the new DataSourceField metadata type . Introduced in API version 52.0, this type has been added to the *Metadata API Developer Guide*.

Add data source field details

Use the new dataSourceFields field on the existing DataSourceObject metadata type to add information about the data source.Introduced in API version 53.0, this field has been added to the Metadata API Developer Guide.

Define the bundle of data streams

Use the new DataSourceBundleDefinition metadata type to define the bundle of streams that a user adds to a datakit. Introduced in API version 52.0, this type has been added to the *Metadata API Developer Guide*.

Store the bundle level mappings

Use the new DataSrcDataModelFieldMap metadata type to store the design-time bundle-level mappings for the Data Source Fields and Data Model Fields metadata. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

Create packages and publish on AppExchange

Use the new ActivationPlatform, ActivationPlatformField, ActvPfrmDataConnectorS3, ActvPlatformAdncldentifier, and ActvPlatformFieldValue metadata types.

Security and Identity

Review custom email notifications sent when a Transaction Security policy is triggered

Use the new customEmailContent field on the existing TransactionSecurityPolicy metadata type.

Disable redirections from your previous My Domain URLs

Use the new redirectPriorMyDomain field on the existing MyDomainSettings metadata type.

Authorize connected apps to make service calls to Einstein Bot APIs

Use the new Chatbot enum value in the scopes field on the Connected App Oauth Config subtype of the existing Connected App metadata type.

Set up single sign-on with a Slack authentication provider

Use the new Slack enum value in the providerType field on the existing AuthProvider metadata type.

Service

Limit how many nonstandard shifts can be assigned to each agent

Use the new LimitNonstandardShifts value in the schedulingRuleType field on the existing SchedulingRule metadata type.

Store bot translation details

Use the new bots field on the Translations metadata type and the following new subtypes of the Translations metadata type:

- BotTranslation
- BotVersionTranslation
- BotDialogTranslation
- BotStepTranslation
- BotMessageTranslation
- BotVariableOperationTranslation
- BotQuickReplyOptionTranslation

Introduced in API version 53.0, this field and these subtypes have been added to the Metadata API Developer Guide.

Set the language for a bot conversation

Use the new SetConversationLanguage value in the type field on the BotVariableOperation subtype of the BotVersion metadata type. Introduced in API version 53.0, this value has been added to the Metadata API Developer Guide.

Create catalog items, catalog categories, and fulfillment flows

Use the following new metadata types and subtypes as part of the general release of Employee Service Catalog:

- SvcCatalogItemDef
- SvcCatalogCategory
- SvcCatalogCategoryItem
- SvcCatalogFulfillmentFlow
- SvcCatalogFulfillFlowItem

Introduced in API version 53.0, these types and subtypes have been added to the Metadata API Developer Guide.

Add conditions to an Object Search (Beta)

Use the new ConversationRecordLookupCondition subtype of the BotVersion metadata type and the following new fields on the ConversationRecordLookup subtype of the BotVersion metadata type:

- conditions
- filterLogic
- sortFieldName
- sortOrder

Introduced in API version 51.0, this subtype and these fields have been added to the Metadata API Developer Guide.

Disable greetings for chat transfers and chat conferences

Introduced in API version 53.0, use the new disableTransferConferenceGreeting field on the existing LiveChatAgentConfig metadata type.

Enable the findOrCreate method of the Chat API for the agents

Introduced in API version 53.0, use the new enableChatFindOrCreateEnable field on the existing LiveAgentSettings metadata type.

Industries - Common Services

Use the following new metadata types and subtype as part of the Contract Lifecycle Management:

- ContractType
- ContractTypeConfig
- ESignatureConfig
- ESignatureEnvelopConfig

Introduced in API version 54.0, these types and subtype have been added to the Metadata API Developer Guide.

Einstein

With multi-classification models in Einstein Discovery, predict more than just binary and numeric outcomes. Launch bots in more places with the Einstein Bots API. In Einstein Pilot Consent, let Salesforce data scientists identify patterns in your selected object data to see how Einstein can help. Read on to learn what else Einstein's been up to.

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Salesforce Overall

Allow Prototyping of Your Data with Einstein Pilot Consent

Let Salesforce data scientists do prototyping and exploration with your data so that you can work smarter. Track where your customers are focused. For example, when users search for content or use an app, services can observe what customers are paying attention to and find patterns to best advertise their content. Grant access only to the apps and objects that you choose. Specify the data that you want us to analyze, and we'll do the rest.

Einstein Search

Einstein Search is on by default in Lightning Experience at no extra cost. Einstein Search gives users a smarter search without taking away search features that they rely on. Einstein Search for Knowledge helps service agents and their customers find knowledge articles relevant to their issues. Plus, actionable natural language search filters now let users change the search for better results.

Analytics

Einstein Discovery

Use multiclass models to predict outcomes with 3 to 10 possible values. Segment your data with free text clustering. Embed multiclass predictions in Salesforce flows. Fine-tune prediction accuracy with trending data.

Commerce

Commerce Einstein

Commerce Einstein uses Al to automate personalization-related tasks and enhance consumer experiences in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

Development

Einstein Vision

Einstein OCR support for handwritten text is now available for images and PDFs (beta). Use the power of Artificial Intelligence (AI) to add personalization to documents.

Einstein Platform

Custom fields with the __pc suffix are Person Account custom fields on the Contact object and aren't supported for Einstein predictions. The AlApplication API doesn't support the delete() call. The Einstein Platform AlApplication API packaging information is added to the list of components available in managed packages.

Industries

Intelligent Form Reader

Extract individual fields from a Compound form field and map them in a template. After extraction, process the special characters in a form field to ensure that all form fields are mapped in a template.

Pardot

Reduce Email Fatigue with Einstein Engagement Frequency

Einstein Engagement Frequency scans individual customer engagement behaviors to predict the optimal send frequency for marketing emails. The frequency category is stored in a prospect field, and can be used to filter prospect lists or as criteria in Engagement Studio.

Filter Pardot Automations with Einstein Account Tier Field

Leverage the power of Einstein Al in automation rules, segmentation rules, and dynamic lists in 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

Get More Insights About Opportunity Progress in Pipeline Inspection

Sales teams can get Al-driven insights about when a deal isn't predicted to close and other factors that could influence the deal. And with metrics such as opportunity score tier, number of days past the close date, and days in stage, sales managers can coach reps to get deals back on track.

Service

Einstein for Service

Now you can include up to 10 fields in your Article Recommendations model and calculate the segment count record for Case Classification. Einstein Bots redesigned the Bot Builder to be more user-friendly, expanded bot availability during retraining, and opened up more bot connections with the API platform.

SEE ALSO:

Custom Fields with __pc Suffix Aren't Supported for Einstein Predictions
AlApplication API Doesn't Support delete()
Get More AlApplication Packaging Information

Einstein Automate

Compose intelligent workflows with Orchestrator, Salesforce Flow, and OmniStudio. Integrate across any system with Mulesoft Composer for Salesforce. Build and deliver personalized recommendations with 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.

Orchestrator (Generally Available)

Declaratively build sophisticated business processes that involve multiple people over multiple stages with multiple flows. Display orchestrated work items to assignees on relevant record pages. This feature, now generally available, includes some changes since the last release.

Salesforce Flow

Build organized flows with auto-layout. Manage record-triggered flows with Flow Trigger Explorer. Customize and provide translations for button labels in the flow screen footer. Design a flow screen with custom screen components that react to other components on the same flow screen (pilot). Use invocable actions to trigger changes in Slack from a flow (beta). Transition to Flow Builder with the Migrate to Flow tool (beta).

Einstein Next Best Action

Use Einstein Next Best Action to display recommendations and flow actions to your users. Recommendation strategy flows are now generally available, giving you the ability to build recommendation strategies using the actions and logic capabilities of Flow Builder.

Einstein Bots Release Notes Have Moved

Einstein Bots is now part of Service Cloud. Check out the Einstein for Service section for the latest and greatest bot features and enhancements.

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.

How: 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 Salesforce mobile app.

How: For OmniStudio release notes, see OmniStudio. For OmniStudio details and pricing, contact your Salesforce account executive.

Expression Sets and Decision Matrices

Sort, filter, and use wildcard values in Decision Matrices. Perform SUM, AVG, MIN, and MAX aggregations in Expression Sets.

FlexCards

Sequentially execute multiple actions from an element. Enable a FlexCard to listen for changes on a record the FlexCard is on, then trigger actions. Enable users to select a child card across multiple parent cards. Channel Name now supports {Parent} and {Session} merge fields. Event Name now supports {Parent}, {Session}, and {recordId} merge fields. Close a modal on click of an action-able element. Automatically close a Flyout using the close event. On a sortable Datatable element, click the sortable column once to sort descending, a second time to sort ascending, and a third time to reset the datatable to its state before sorting. View your org's namespace in the FlexCard Designer header. In a Navigation action, the App Target format is standard__[appName] or [name-space]__[appName] and the Component Name format is [namespace]__[componentName]. Access the Datatable Name property of a Datatable element directly from the Properties panel.

OmniScripts

The runtime for multiple OmniScript features was moved from server-side to Salesforce core. Enable older PDF viewers to display text fields in a PDF element using the appearance object property.

DataRaptors and Integration Procedures

Specify users, roles, profiles, permission sets, custom permissions, or any combination in the Required Permission property of DataRaptors and Integration Procedures. Run legacy Calculation Procedures and Calculation Matrices using Remote Actions in Integration Procedures.

Orchestrator (Generally Available)

Declaratively build sophisticated business processes that involve multiple people over multiple stages with multiple flows. Display orchestrated work items to assignees on relevant record pages. This feature, now generally available, includes some changes since the last release.

IN THIS SECTION:

Orchestrate Multiuser Processes with Orchestrator

Combine your automated processes in a single interface with Orchestrator. Use Orchestrator's no-code approach to create orchestrations and transform flows into steps organized by stages. Benefits of Orchestrator include more flexibility to create approval processes, better ability to assign work to any Salesforce user, and more control over record lifecycles. Use Orchestrator to automate complex processes, and use Flow Trigger Explorer to order record-triggered flows.

Customize Entry and Exit Conditions with Evaluation Flows

Use evaluation flows to define custom criteria for stage exit conditions and step entry and exit conditions. This new type of flow contains a predefined variable that you set to true when your custom criteria are met. Previously, you could select any autolaunched flow that used the isOrchestrationConditionMet variable to evaluate custom entry or exit criteria. Now, you can select an evaluation flow only for entry and exit conditions. This change affects new orchestrations and existing orchestrations that you make changes to.

Assign Interactive Steps to Groups or Queues

Avoid process bottlenecks by assigning an interactive step to queue or public group rather than a specific user. All queue or public group members receive an email when the associated work item is created. When more than one person starts the work item, the step is completed by the first user who completes the associated flow. All other users who were in the process of completing the associated flow, receive an error when they finish the flow. After the first user completes the flow, other users no longer see the work item on the associated context record. Public groups are groups with a type of Regular. Queues are groups with a type of Queue.

Process Background Steps Asynchronously

You can now mark background steps to be processed asynchronously to prevent orchestration errors. Use this option when the autolaunched flow associated with a background step makes external callouts or contains a Pause element. The in-progress orchestration pauses when an asynchronous background step runs. When the associated flow completes, the orchestration resumes and sets the status for the asynchronous background step to Completed. The orchestration then continues.

Trigger Your Orchestration from Custom Code

You can now call your autolaunched orchestration from custom code, such as Apex or a third-party system. Trigger an orchestration with an API call the same way that you call a flow.

Orchestration Debugging (Generally Available)

See debug information for your in-progress and failed orchestrations in the Details pane on the canvas in Flow Builder. Debug details help you visualize the path an orchestration takes, the variable values at given points in the automation, and the errors that the orchestration encounters. Orchestration debug information doesn't include transaction boundaries and governor limits.

Orchestration Deployment (Generally Available)

Use packaging or change sets to move your orchestration and its associated flows from one org to another.

Orchestration Management (Generally Available)

Use orchestration run list views to manage your orchestration runs.

Orchestration Work Items (Generally Available)

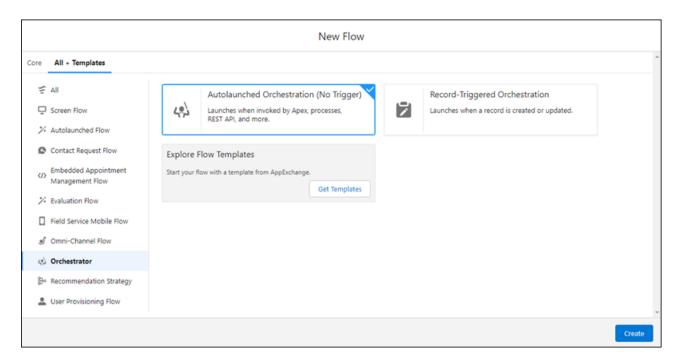
Use the Orchestrator Work Guide Lightning App Builder component to display work items on record pages. Use list views to view and reassign orchestration work items.

Orchestrate Multiuser Processes with Orchestrator

Combine your automated processes in a single interface with Orchestrator. Use Orchestrator's no-code approach to create orchestrations and transform flows into steps organized by stages. Benefits of Orchestrator include more flexibility to create approval processes, better ability to assign work to any Salesforce user, and more control over record lifecycles. Use Orchestrator to automate complex processes, and use Flow Trigger Explorer to order record-triggered flows.

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

How: From the Flows page in Setup, click **New Flow**. In New Flow, click **All + Templates** and select **Orchestrator**. Select either **Autolaunched Orchestration (No Trigger)** or **Record-Triggered Orchestrations**, 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.

SEE ALSO:

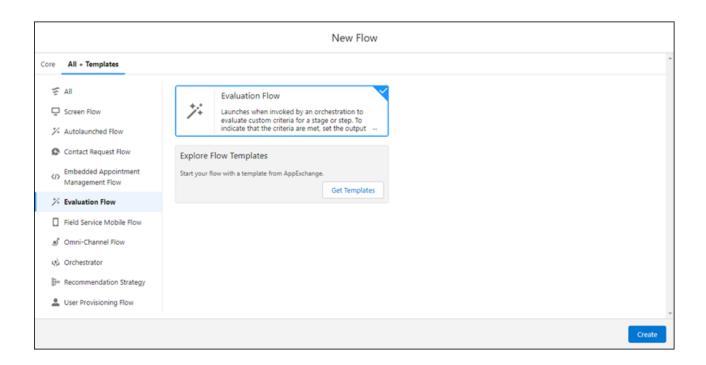
Visualize All Your Record-Triggered Flows in One Place with Flow Trigger Explorer Define the Run Order of Record-Triggered Flows for an Object

Customize Entry and Exit Conditions with Evaluation Flows

Use evaluation flows to define custom criteria for stage exit conditions and step entry and exit conditions. This new type of flow contains a predefined variable that you set to true when your custom criteria are met. Previously, you could select any autolaunched flow that used the isOrchestrationConditionMet variable to evaluate custom entry or exit criteria. Now, you can select an evaluation flow only for entry and exit conditions. This change affects new orchestrations and existing orchestrations that you make changes to.

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

How: From the Flows page in Setup, click **New Flow**. In New Flow, click **All + Templates** and select **Evaluation Flow**. Select the **Evaluation Flow** tile, and click **Next**.



Add elements to define the necessary custom criteria. Set the isOrchestrationConditionMet variable to true when the criteria are met. Otherwise, set the variable to false.

SEE ALSO:

Salesforce Help: Orchestration Stages (Right-click to view in a new tab or window.) Salesforce Help: Orchestration Steps (Right-click to view in a new tab or window.)

Assign Interactive Steps to Groups or Queues

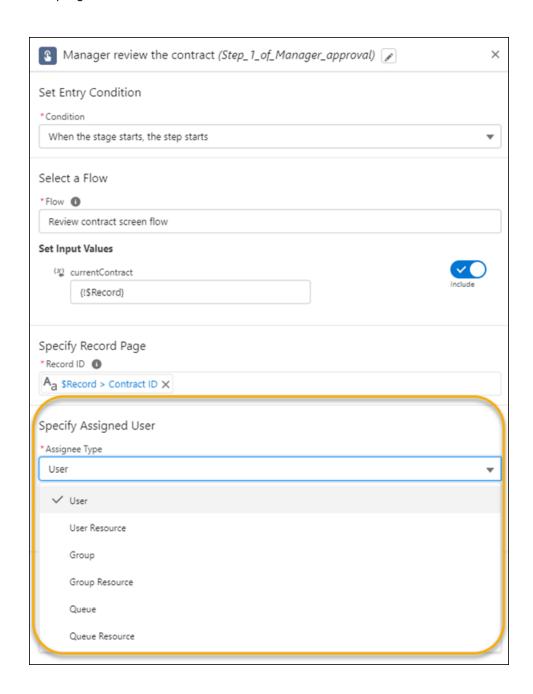
Avoid process bottlenecks by assigning an interactive step to queue or public group rather than a specific user. All queue or public group members receive an email when the associated work item is created. When more than one person starts the work item, the step is completed by the first user who completes the associated flow. All other users who were in the process of completing the associated flow, receive an error when they finish the flow. After the first user completes the flow, other users no longer see the work item on the associated context record. Public groups are groups with a type of Regular. Queues are groups with a type of Queue.

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

How: In the Details pane of an interactive step, for Assignee Type, select **Group**, **Group Resource**, **Queue**, or **Queue Resource**. For Group or Queue, enter the name of a group or queue. For Group Resource or Queue Resource, enter a resource that contains the group or queue name.



Note: For a user to complete an interactive step, they must have access to the associated internal Salesforce Lightning record page. The User field for an interactive step's assigned user includes Experience site users. Don't reassign work to Experience site users because they generally don't have access to internal record pages, and they can't complete orchestration work items.



SEE ALSO:

Salesforce Help: What Is a Group? (Right-click to view in a new tab or window.) Salesforce Help: Set Up Queues (Right-click to view in a new tab or window.)

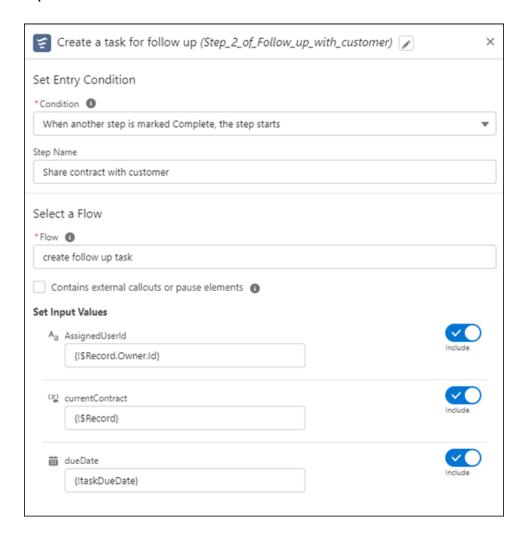
Process Background Steps Asynchronously

You can now mark background steps to be processed asynchronously to prevent orchestration errors. Use this option when the autolaunched flow associated with a background step makes external callouts or contains a Pause element. The in-progress orchestration pauses when an asynchronous background step runs. When the associated flow completes, the orchestration resumes and sets the status for the asynchronous background step to Completed. The orchestration then continues.

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

Why: A background step launches an autolaunched flow that has no trigger and requires no user interaction. The in-progress orchestration doesn't pause when a background step runs. After the background step's flow completes, the in-progress background step is marked Completed. When a background step's autolaunched flow contains an external callout or Pause element, however, it must be run asynchronously, or it can cause the orchestration to fail.

How: In the Details pane of an orchestration background step, select an autolaunched flow, and then select **Contains external callouts or pause elements**.



Trigger Your Orchestration from Custom Code

You can now call your autolaunched orchestration from custom code, such as Apex or a third-party system. Trigger an orchestration with an API call the same way that you call a flow.

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

SEE ALSO:

Salesforce Help: Launch a Flow from Apex (Right-click to view in a new tab or window.)

Salesforce Help: Launch a Flow from the REST API (Right-click to view in a new tab or window.)

Orchestration Debugging (Generally Available)

See debug information for your in-progress and failed orchestrations in the Details pane on the canvas in Flow Builder. Debug details help you visualize the path an orchestration takes, the variable values at given points in the automation, and the errors that the orchestration encounters. Orchestration debug information doesn't include transaction boundaries and governor limits.

IN THIS SECTION:

Debug Your In-Progress Orchestration

View debug information about an in-progress orchestration to better understand the path an orchestration takes with different scenarios and the variable values at points in the automation. We recommend that you design and debug your orchestration in a sandbox environment.

Debug a Failed Orchestration

View debug information to troubleshoot a failed orchestration and gain insights about why it failed.

Debug Your In-Progress Orchestration

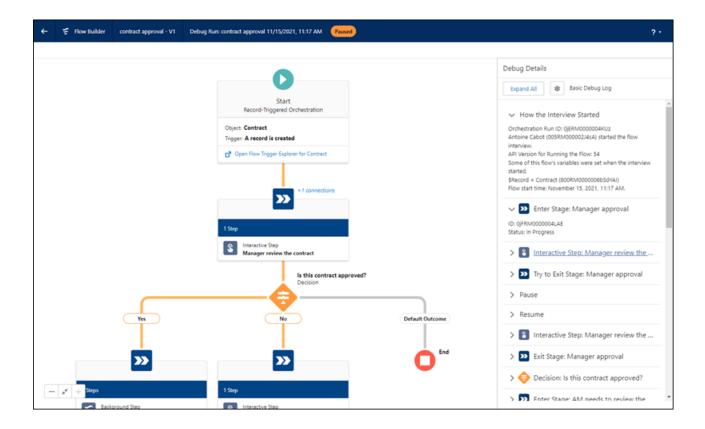
View debug information about an in-progress orchestration to better understand the path an orchestration takes with different scenarios and the variable values at points in the automation. We recommend that you design and debug your orchestration in a sandbox environment.

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

How: While you can view debug details for in-progress orchestrations, we recommend that you design and debug your orchestration in a sandbox environment. That way you don't have to worry about manually rolling back record additions, changes, or deletions that result from your orchestration. On the All Orchestration Runs list view, select **Debug Orchestration** in the dropdown for the in-progress orchestration.



Note: If you started running an orchestration before upgrading to Spring '22, stage and step instance IDs are shown as null in orchestration debug information. Evaluation flow output is also shown as null.



Debug a Failed Orchestration

View debug information to troubleshoot a failed orchestration and gain insights about why it failed.

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

How: While you can view debug details for failed orchestrations, we recommend that you design and debug your orchestration in a sandbox environment. That way you don't have to worry about manually rolling back record additions, changes, or deletions that result from your orchestration. You can view debug information for an activated orchestration that fails in two ways. However, if you haven't activated your orchestration, you can see debug information only in the error email.

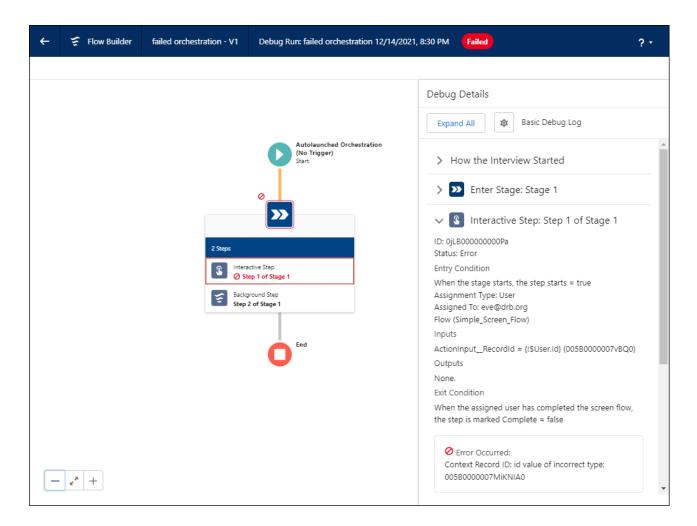
- View the information in the error email. You can also click the link at the beginning of the email to see the information in the Details pane of Flow Builder. Specify the email address in Setup, on the Process Automation Setting page.
- From Setup, in the Quick Find box, enter flow, and then select **Paused and Failed Flow Interviews**. On the Flow Interviews page, select **All Failed Flow Interviews** from the list view dropdown.



Select **Open** for the failed orchestration.

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Note: If you started running an orchestration before upgrading to Spring '22, stage and step instance IDs are shown as null in orchestration debug information. Evaluation flow output is also shown as null.



Orchestration Deployment (Generally Available)

Use packaging or change sets to move your orchestration and its associated flows from one org to another.

IN THIS SECTION:

Package Your Orchestration

Create a package with your orchestration, and move it from one org to another. We recommend that you create and debug your orchestration in a sandbox environment. When it's ready, create a package to deploy it to your production environment.

Deploy Orchestrations with Change Sets

Use separate change sets for an orchestration and its associated flows to send changes from one org to another. An orchestration references screen flows, autolaunched flows, and evaluation flows. Referenced flows must be activated before the orchestration is created or deployed, or the orchestration can't use them. Flows distributed through a change set are always deployed as inactive in the target org, even if they were active in the source org. This flow limitation means that you must first create a change set with your orchestration's flows. Deploy it, and activate all referenced flows in the target org before you deploy your orchestration.

Package Your Orchestration

Create a package with your orchestration, and move it from one org to another. We recommend that you create and debug your orchestration in a sandbox environment. When it's ready, create a package to deploy it to your production environment.

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

How: You can't package an orchestration that has specific assigned users for interactive steps. You can assign a constant that contains the username for interactive steps to package the orchestration. Then update the constants that contain the assigned user for each step after you install the orchestration in the target environment.

Deploy Orchestrations with Change Sets

Use separate change sets for an orchestration and its associated flows to send changes from one org to another. An orchestration references screen flows, autolaunched flows, and evaluation flows. Referenced flows must be activated before the orchestration is created or deployed, or the orchestration can't use them. Flows distributed through a change set are always deployed as inactive in the target org, even if they were active in the source org. This flow limitation means that you must first create a change set with your orchestration's flows. Deploy it, and activate all referenced flows in the target org before you deploy your orchestration.

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

How: In your source org, activate all flows associated with your orchestration. Create the change set for the referenced flows, and deploy it to your target org. Manually activate all flows from the change set in the target org. Next create a change set for your orchestration in your source org, and deploy it to your target org. Activate the orchestration in the target org.

We recommend that you create and debug your orchestration in a sandbox environment. When it's ready, deploy it to your production environment.



Note: If you use Salesforce CLI, it deploys flows as active if they're active when you create the second-generation package so that Salesforce CLI can deploy with one package.

SEE ALSO:

Salesforce Help: Considerations for Deploying Flows with Change Sets (Right-click to view in a new tab or window.)
Salesforce CLI Setup Guide: Before You Begin (Right-click to view in a new tab or window.)

Orchestration Management (Generally Available)

Use orchestration run list views to manage your orchestration runs.

IN THIS SECTION:

View Orchestration Runs

Use the All Orchestration Runs list view to see all in-progress, cancelled, and completed orchestrations in your org. You can also access the status for each stage and step associated with an orchestration run and view the orchestration run history.

Cancel Orchestrations

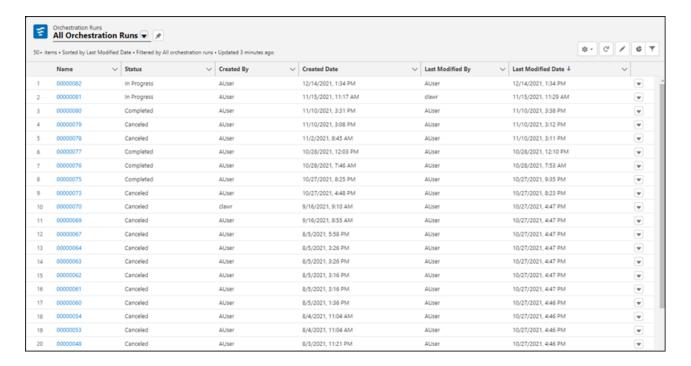
You can now cancel in-progress orchestrations from the orchestration runs list view.

View Orchestration Runs

Use the All Orchestration Runs list view to see all in-progress, cancelled, and completed orchestrations in your org. You can also access the status for each stage and step associated with an orchestration run and view the orchestration run history.

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

How: In the App Launcher, find and select **Orchestration Runs**. On the Orchestration Runs page, select **All Orchestration Runs** from the list view dropdown. To see details about a specific orchestration run, click the link for an orchestration, and then click the **Related** tab.

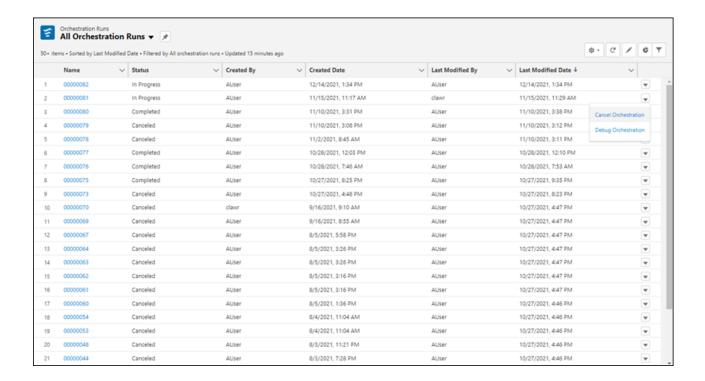


Cancel Orchestrations

You can now cancel in-progress orchestrations from the orchestration runs list view.

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

How: On the All Orchestration Runs list view, select **Cancel Orchestration** in the dropdown for the in-progress orchestration.



Orchestration Work Items (Generally Available)

Use the Orchestrator Work Guide Lightning App Builder component to display work items on record pages. Use list views to view and reassign orchestration work items.

IN THIS SECTION:

Increase Productivity with Orchestrator Work Guide

Orchestrator reduces handoff time by notifying the next assigned person at the right time. An orchestration creates a work item for an interactive step and notifies the assigned user that the work is ready. The assigned user sees and completes the work on the relevant record without wasting time switching between tools.

Manage Assigned Work with the Orchestration Work Items List View

Use the All Open Orchestration Work Items list view to see all assigned, but not completed, work items. If necessary, you can also reassign open items to another user, group, or queue. Assigned users can see their pending work on the list view. They can also access specific work items from the context record link for each item.

Reassign Orchestration Work Items

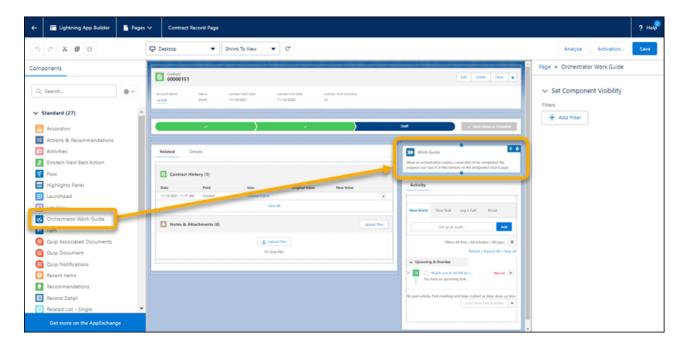
When an interactive step in an orchestration runs, it creates a work item and assigns it to a user, group, or queue. You can now reassign a work item that hasn't been completed to a different user, group, or queue.

Increase Productivity with Orchestrator Work Guide

Orchestrator reduces handoff time by notifying the next assigned person at the right time. An orchestration creates a work item for an interactive step and notifies the assigned user that the work is ready. The assigned user sees and completes the work on the relevant record without wasting time switching between tools.

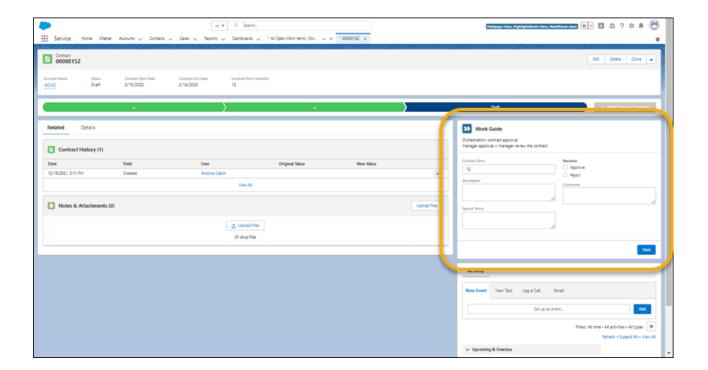
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: When you create an interactive step in an orchestration, specify the record where work for the assigned user is displayed. In Lightning App Builder, place the Orchestrator Work Guide component on the record page.



When a running orchestration generates a work item for a user, group, or queue, it sends an email with a link to the specified record page to all assigned users. They can complete their assigned work in the Work Guide component.

Note: Users can also access their assigned work items in the All Open Work Items list view of orchestration work items.



SEE ALSO:

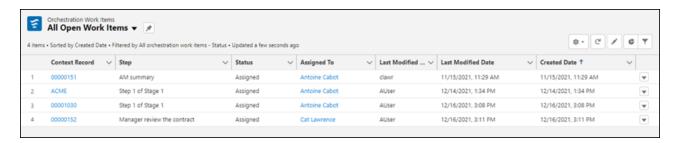
Assign Interactive Steps to Groups or Queues

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Use the All Open Orchestration Work Items list view to see all assigned, but not completed, work items. If necessary, you can also reassign open items to another user, group, or queue. Assigned users can see their pending work on the list view. They can also access specific work items from the context record link for each item.

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

How: In the App Launcher, find and select **Orchestration Work Items**. On the Orchestration Work Items page, select **All Open Work Items** from the list view dropdown.

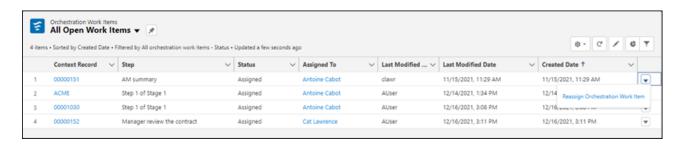


Reassign Orchestration Work Items

When an interactive step in an orchestration runs, it creates a work item and assigns it to a user, group, or queue. You can now reassign a work item that hasn't been completed to a different user, group, or queue.

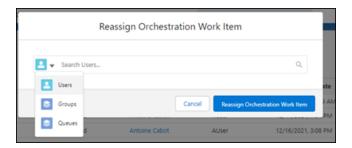
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: In the All Open Work Items list view, select Reassign Orchestration Work Item from the list item dropdown.



Specify the new user, group, or queue, and click **Reassign Orchestration Work Item**.

Note: For a user to complete an interactive step, they must have access to the associated internal Salesforce Lightning record page. The User field for an interactive step's assigned user includes Experience site users. Don't assign work to Experience site users because they generally don't have access to internal record pages, and they can't complete orchestration work items.



Salesforce Flow

Build organized flows with auto-layout. Manage record-triggered flows with Flow Trigger Explorer. Customize and provide translations for button labels in the flow screen footer. Design a flow screen with custom screen components that react to other components on the same flow screen (pilot). Use invocable actions to trigger changes in Slack from a flow (beta). Transition to Flow Builder with the Migrate to Flow tool (beta).

IN THIS SECTION:

Flow Builder

Easily build organized flows with auto-layout. Provide translations for custom button labels in the flow screen footer. Efficiently generate choice options with record collections. Take advantage of expanded accessibility options and your keyboard to create and edit flows.

Flow Runtime

Update flow screens to use Section components to prepare for the replacement of two-column layouts with multicolumn screens. Design a flow screen with custom screen components that respond to user input on the same screen (pilot). Versioned updates are available for flows and processes that are configured to run on API version 54.0.

Flow Management

Prepare for the transition to Flow Builder. Convert workflow rules to flows with the Migrate to Flow tool (beta).

Flow Extensions

Manage Slack conversations and users from a flow with invocable actions (beta).

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder

Easily build organized flows with auto-layout. Provide translations for custom button labels in the flow screen footer. Efficiently generate choice options with record collections. Take advantage of expanded accessibility options and your keyboard to create and edit flows.

IN THIS SECTION:

Place Flow Elements Automatically with Auto-Layout (Generally Available)

Building flows and aligning elements is easier with auto-layout. Elements on the canvas are spaced, connected, and aligned automatically, saving you time and keeping your canvas neatly organized. Auto-layout is now the default canvas layout for flows. User templates also now open in auto-layout.

Visualize All Your Record-Triggered Flows in One Place with Flow Trigger Explorer

See and manage your record-triggered flows with Flow Trigger Explorer, a new tool that's more visual and interactive than the Flows list view. Flow Trigger Explorer shows all of the flows that are associated with a specified object and that run when a record is created, updated, or deleted. For example, quickly see all flows that are triggered to run when a case record is created.

Translate and Customize Button Labels in the Flow Screen Footer (Generally Available)

Customize the Previous, Pause, Next, and Finish button label text in Flow Builder. You can also provide button label text for other languages. With customized screen navigation options, you can let a user know what to expect when the user clicks the button. Previously, to customize these footer labels, you built a custom component.

Generate Choice Options from Record Collections

Use existing record collections to generate collection-based choices in a flow. Collection choice sets prevent the need to duplicate the results of a Get Records element, a component, or an action. Instead of querying for a set of records multiple times throughout the flow, you can create a collection once, and then use the record collection anywhere that you need it.

Filter Items into a Collection in Flow Builder

Now you can filter unwanted data from your collections in Flow Builder. Use the Collection Filter element to select a collection and define conditions. When the flow runs, the element outputs a collection with only the items that meet those conditions, leaving your original collection intact.

Place More Fields Directly on Flow Screens (Beta)

You can now use record fields to directly add phone, email, and picklist fields to your flow screens. For dependent picklist fields, both the controlling field and the dependent field must be on the same screen.

Define the Run Order of Record-Triggered Flows for an Object

Specify a trigger order value to determine the run order of before-save or after-save flows for the same object. Declaratively configure a flow to run before or after another flow. Order your flows to help ensure consistent results without creating overly complex flows, letting you divide automation by teams or logical owners.

Configure Flows with Your Keyboard and Screen Reader

With new accessibility options, you can create and edit flows and screens using only your keyboard. Screen readers also now describe elements within a canvas, as well as elements' positions relative to each other.

Open Subflows from the Auto-Layout Canvas

Want to take a look at or tweak a referenced flow? In auto-layout, you can quickly access subflows right from the canvas.

Connect Elements in For-Each Loops to Elements Outside of the Loop

In auto-layout, you can now add Go To connectors in for-each loops that connect to elements outside of the loop. Use Go To connectors to connect flow elements across the flow, except for End elements.

Do More with Terminated Paths in Auto-Layout

You can now terminate paths within a loop in auto-layout. You can also convert a flow that contains a terminated path in a loop from freeform to auto-layout.

Track Flows in Browser Tabs

A flow's name and version now appear on your browser tab titles, so you can quickly scan your workspace and find your flow.

Easily Add Frequently Used Elements to Record-Triggered Flows via Shortcuts

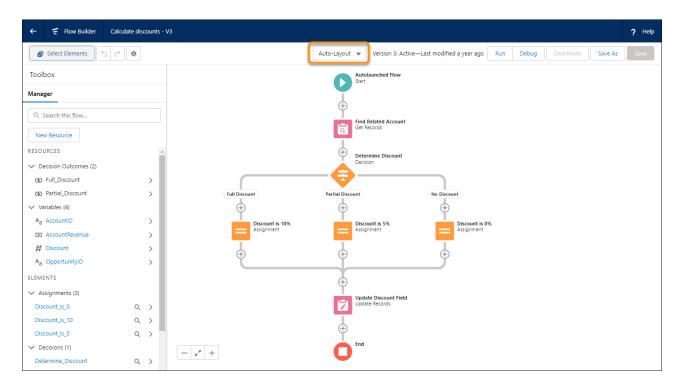
Now you can access your most frequently used elements from the top of the Add Element menu. When you create a record-triggered flow, add a preconfigured Update Records element that updates fields on the triggering record or an action that sends an email using an email alert. Shortcuts are available only for record-triggered flows in auto-layout mode.

Place Flow Elements Automatically with Auto-Layout (Generally Available)

Building flows and aligning elements is easier with auto-layout. Elements on the canvas are spaced, connected, and aligned automatically, saving you time and keeping your canvas neatly organized. Auto-layout is now the default canvas layout for flows. User templates also now open in auto-layout.

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

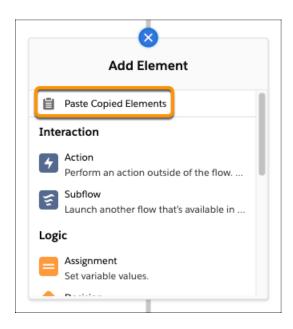
How: To switch between auto-layout while in freeform, select **Auto-Layout** from the dropdown menu. To insert an element, click \oplus where you want it to run. Flow Builder then shows the options and possible elements for that location.



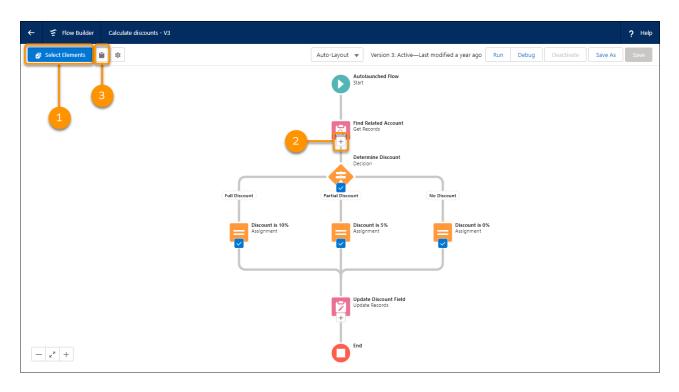
To edit, copy, or delete an element, click it.



After copying an element, click \oplus where you want to place it. Then click **Paste Copied Elements**.



You can also copy and paste a set of elements to another location.



Click **Select Elements** (1), and then click + on each desired element (2). To copy the elements, click (3). To paste, click (3) in the desired location, and click **Paste Copied Elements**.

Visualize All Your Record-Triggered Flows in One Place with Flow Trigger Explorer

See and manage your record-triggered flows with Flow Trigger Explorer, a new tool that's more visual and interactive than the Flows list view. Flow Trigger Explorer shows all of the flows that are associated with a specified object and that run when a record is created, updated, or deleted. For example, quickly see all flows that are triggered to run when a case record is created.

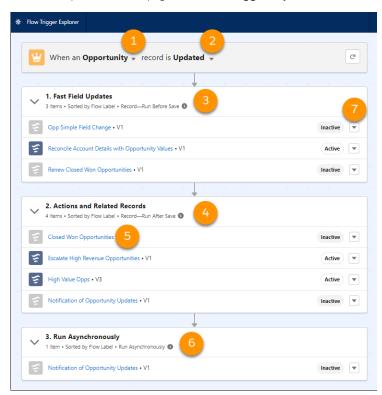
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Now navigate easily between an individual flow in Flow Builder and other flows that run under the same circumstances. See details about a flow and manage its versions all within Flow Trigger Explorer.

How: In Flow Builder at the bottom of the Start element for a record-triggered flow, click **Open Flow Trigger Explorer for [object name, for example Account]**.

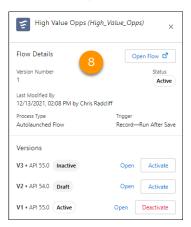


Or from Setup, on the Flows page, click **Flow Trigger Explorer**.



In Flow Trigger Explorer, select an object (1) and a trigger (2) to see flows that run when a record for that object is created, updated, or deleted. See all of the before-save (3) and after-save flows (4) that run for the same object and trigger. Click a flow label (5) to open the

flow in Flow Builder in a new tab. See any asynchronous paths (6) that are associated with flows that run for the same object and trigger. Click a menu dropdown and select **Flow Details and Versions** (7) to see details and activate or deactivate versions of the flow (8).

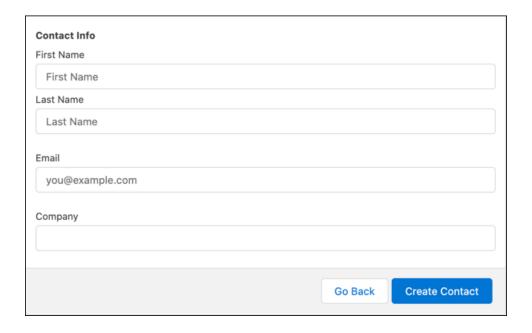


Translate and Customize Button Labels in the Flow Screen Footer (Generally Available)

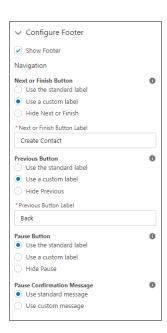
Customize the Previous, Pause, Next, and Finish button label text in Flow Builder. You can also provide button label text for other languages. With customized screen navigation options, you can let a user know what to expect when the user clicks the button. Previously, to customize these footer labels, you built a custom component.

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

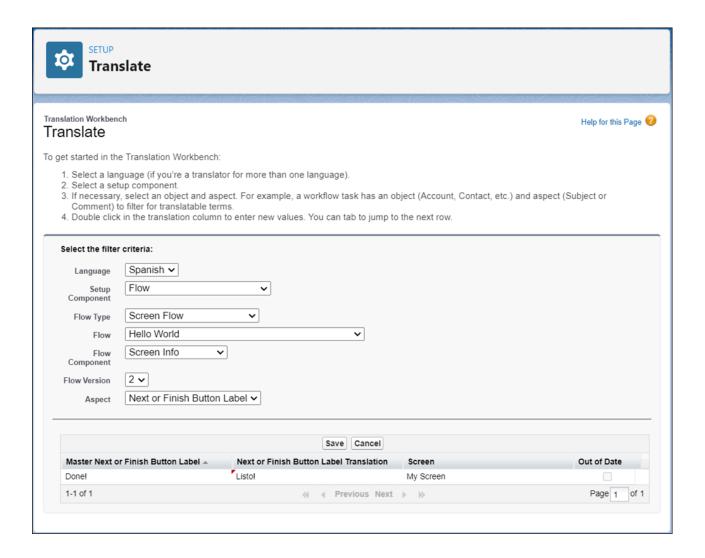
Why: Sometimes a flow screen's navigation button doesn't clearly state what happens when a user clicks it. For example, you're designing a screen flow and using a Create Records element that creates a contact record. On the flow screen, you change the Finish button to Create Contact and change the Previous button to Go Back. The custom label makes it clear that a contact record is created as a result of the flow.



How: To relabel a button, select **Use a custom label**, and enter the text that you want to use.



To provide translated labels, use Translation Workbench.





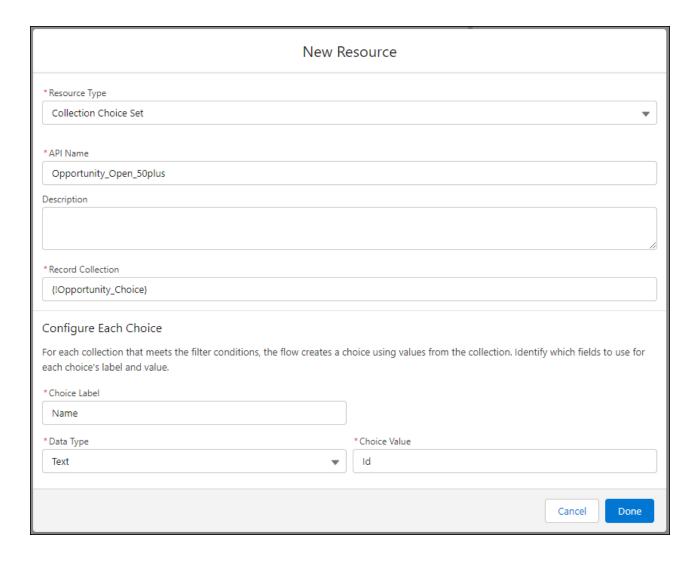
Note: Custom footer labels don't support merge fields.

Generate Choice Options from Record Collections

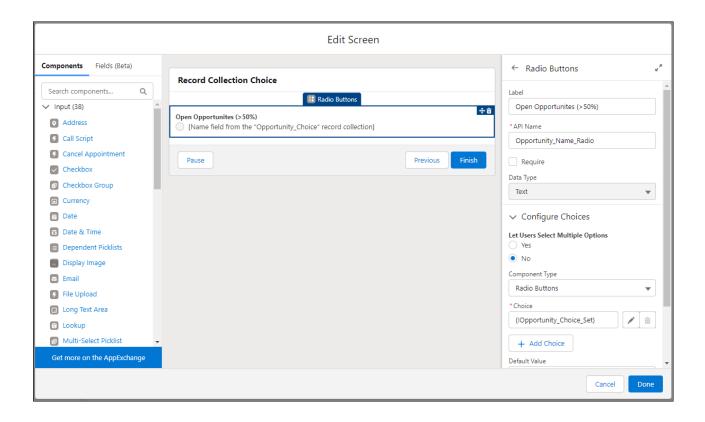
Use existing record collections to generate collection-based choices in a flow. Collection choice sets prevent the need to duplicate the results of a Get Records element, a component, or an action. Instead of querying for a set of records multiple times throughout the flow, you can create a collection once, and then use the record collection anywhere that you need it.

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

How: Create a resource and select **Collection Choice Set** as the resource type. Then, select a record collection and the fields to use for the choice's label and value. For most use cases, set the choice label to *Name* and the choice value to *ID*.



After you create a record collection choice set, you can add it to a choice component.

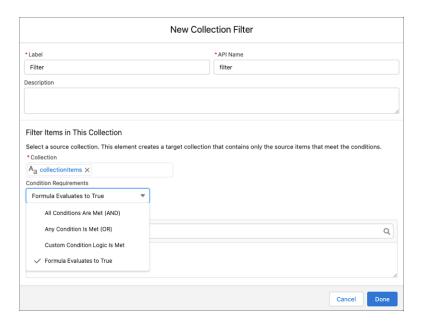


Filter Items into a Collection in Flow Builder

Now you can filter unwanted data from your collections in Flow Builder. Use the Collection Filter element to select a collection and define conditions. When the flow runs, the element outputs a collection with only the items that meet those conditions, leaving your original collection intact.

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

How: When defining conditions, you can set the requirements using a formula or logic, such as All Conditions Are Met, Any Condition Is Met, or your own custom condition logic.



Place More Fields Directly on Flow Screens (Beta)

You can now use record fields to directly add phone, email, and picklist fields to your flow screens. For dependent picklist fields, both the controlling field and the dependent field must be on the same screen.

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.

SEE ALSO:

Place Record Fields Directly on Flow Screens (Beta)

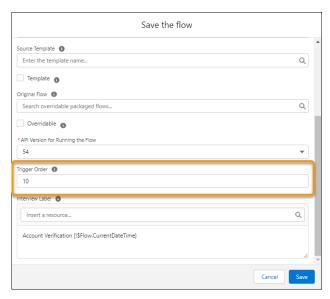
Define the Run Order of Record-Triggered Flows for an Object

Specify a trigger order value to determine the run order of before-save or after-save flows for the same object. Declaratively configure a flow to run before or after another flow. Order your flows to help ensure consistent results without creating overly complex flows, letting you divide automation by teams or logical owners.

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

Why: You can define a trigger order value only for a before- or an after-save record-triggered flow on an object. For example, you can prioritize an after-save flow to run before other after-save flows on the Case object. But you can't prioritize an after-save flow to run before any before-save flows or before an Apex trigger. Multiple flows can have the same trigger order value.

How: When you save a before- or after-save record-triggered flow, specify a trigger order value from 1 to 2,000. In a flow that's already saved, specify a trigger order value in the flow's version properties.



- Flows with the same trigger (before- or after-save) on the same object with trigger order values from 1 to 1,000 run in ascending order (1, 2, 3, and so on). Multiple flows with the same trigger order value run in alphabetical order based on the flows' API names.
- Flows without trigger order values run next and in the order of their created dates. Flows in Winter '22 and before run and continue to run in this order, unless you define a trigger order value for them.
- Flows with trigger order values from 1,001 to 2,000 run next and in ascending order. Any ties are settled using the flows' API names.

When you order a large number of flows, a best practice is to evenly distribute the trigger order values, for example, 10, 20, 30, or 100, 200, 300. Then later, you can easily slot another flow in between, for example, between 10 and 20. This practice can help you avoid changing the trigger order values for preexisting flows.

Activating, deactivating, or changing the order for one flow can cause the order for other flows to be automatically updated. Ordering record-triggered flows has no direct effect on any associated scheduled or asynchronous paths.

Configure Flows with Your Keyboard and Screen Reader

With new accessibility options, you can create and edit flows and screens using only your keyboard. Screen readers also now describe elements within a canvas, as well as elements' positions relative to each other.

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

How: In auto-layout, these keyboard shortcuts are updated.

Action	macOS	Windows
Switch item focus	Tab, Shift+Tab (backwards)	Tab, Shift+Tab (backwards)
Navigate element menu	Arrow keys	Arrow keys
Switch section focus	F6, Shift+F6 (backwards)	F6, Shift+F6 (backwards)
Configure the selected component	Enter	Enter
Reorder the selected component	Select the component with Spacebar, then use the arrow keys to reorder it. To place the component, press Spacebar.	Select the component with Spacebar, then use the arrow keys to reorder it. To place the component, press Spacebar.

Action	macOS	Windows
Cancel reordering	Esc	Esc

For editing screen elements, these keyboard shortcuts are updated.

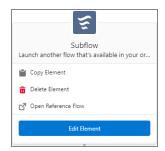
Action	macOS	Windows
Return to canvas	Shift+F6	Shift+F6
Switch item focus	Tab, Shift+Tab (backwards)	Tab, Shift+Tab (backwards)
Configure the selected component	Enter	Enter
Reorder the selected component	Select the component with Spacebar, then use the arrow keys to reorder it. To place the component, press Spacebar again.	Select the component with Spacebar, then use the arrow keys to reorder it. To place the component, press Spacebar again.
Cancel reordering	Esc	Esc

Open Subflows from the Auto-Layout Canvas

Want to take a look at or tweak a referenced flow? In auto-layout, you can quickly access subflows right from the canvas.

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

How: To open a referenced flow, click the subflow element and then click **Open Reference Flow**. You can also open a referenced flow while editing a subflow element.



Connect Elements in For-Each Loops to Elements Outside of the Loop

In auto-layout, you can now add Go To connectors in for-each loops that connect to elements outside of the loop. Use Go To connectors to connect flow elements across the flow, except for End elements.

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

How: To connect to an element that isn't next on the auto-layout path, click \oplus on the connector that you want to change. Then click **Connect to element**. Next, click + on the element you want to connect.



Do More with Terminated Paths in Auto-Layout

You can now terminate paths within a loop in auto-layout. You can also convert a flow that contains a terminated path in a loop from freeform to auto-layout.

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

Track Flows in Browser Tabs

A flow's name and version now appear on your browser tab titles, so you can quickly scan your workspace and find your flow.

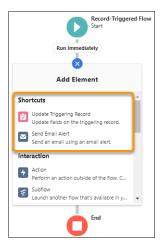
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

Easily Add Frequently Used Elements to Record-Triggered Flows via Shortcuts

Now you can access your most frequently used elements from the top of the Add Element menu. When you create a record-triggered flow, add a preconfigured Update Records element that updates fields on the triggering record or an action that sends an email using an email alert. Shortcuts are available only for record-triggered flows in auto-layout mode.

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 and select **Update Triggering Record** or **Send Email Alert**. The Send Email Alert action is unavailable for before-save record-triggered flows, which don't support Action elements.



Flow Runtime

Update flow screens to use Section components to prepare for the replacement of two-column layouts with multicolumn screens. Design a flow screen with custom screen components that respond to user input on the same screen (pilot). Versioned updates are available for flows and processes that are configured to run on API version 54.0.

IN THIS SECTION:

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

Starting in Winter '23, two-column layouts are ignored. Don't worry, you won't lose any data, and we have a much better layout option for you. We recommend that you prepare now for this change by updating your flow screens to use Section components. The Section component lets you organize record fields and screen components into up to four columns directly in the screen.

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.

Flow and Process Run-Time Improvements in API Version 54.0

These updates affect only flows and processes that are configured to run on API version 54.0 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.

Other Changes to Flow Screen Components

We rebuilt the Checkbox Group component using Lightning Web Components (LWC). We also improved the run-time error behavior for custom Aura components. Flow Builder preview for the Dependent Picklists component is available only for objects that are supported in the User Interface API.

URL-Launched Screen Flows Use a White Background

When a screen flow is launched via a URL-based method, the screen background is now white to meet the contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1 Level AA. Previously, the background was gray. The background color change applies when flows are launched from a custom web tab, a custom button or link, Flow Builder, or the flow URL. This change doesn't apply when you're debugging flows.

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

Starting in Winter '23, two-column layouts are ignored. Don't worry, you won't lose any data, and we have a much better layout option for you. We recommend that you prepare now for this change by updating your flow screens to use Section components. The Section component lets you organize record fields and screen components into up to four columns directly in the screen.

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

Why: Section components provide much more control and flexibility than two-column layouts.

- Each section can have up to four columns, and you can adjust the width of each column.
- Each screen can have multiple sections, so you can combine column configurations—some sections can use two columns while others use four columns—all on the same screen.
- As you build your flow screen, you see a live preview of the layout right in Flow Builder.
- You can apply conditional visibility to an entire section, so you can avoid setting up conditional visibility for individual screen components.
- Sections are responsive, so columns stack vertically to fit on mobile phones.

How: Determine whether your screen flows are distributed in a way that specifies a two-column layout. For example:

- You included the flowLayout=twoColumn attribute in the flow URL and shared that URL with users or used that URL to create a custom web tab, custom button, or custom link.
- You set the Layout property to Two Columns when you added a flow to a Lightning page, utility bar, or Experience Builder site.

For each flow screen that you want to continue rendering in two columns, use a Section component to organize the screen components and record fields.

SEE ALSO:

Salesforce Help: Flow Screen Output Component: Section

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 the user enters a string in a Text component, a custom Knowledge Article Search component searches using the text input value and returns the search results on the same screen. Another example is including a custom component that performs a calculation using numerical outputs from other components on the same screen.

How: Ask your Salesforce representative to nominate you for the Salesforce Flow: Reactive Screen Components pilot program.

In 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 changes made to the first component by setting its inputs to the output of the first component. For example, set the Knowledge Article Search component's query input to the output of the Text component.

SEE ALSO:

Trailblazer Community: Flow Reactive Screens Pilot

Flow and Process Run-Time Improvements in API Version 54.0

These updates affect only flows and processes that are configured to run on API version 54.0 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.

After-Save Record-Triggered Flows Now Run Before Entitlements are Executed

Now in the order of execution, after-save flows run before entitlements are executed, so that entitlements can include the record updates that after-save flows make. In API version 53.0 and earlier, after-save record-triggered flows still run after entitlements are executed.

After-save flows now run immediately after processes created via Process Builder, without entitlements executing between them. For Salesforce admins who migrate to flows from processes, this change helps to ensure consistent results for entitlements.

Approval and Time-Based Workflow Field Updates Now Execute Before-Save and After-Save Record-Triggered Flows

Field update actions associated with approval processes and time-dependent actions in workflow rules now execute before-save and after-save record-triggered flows so that these update actions can incorporate flow automation. In API version 53.0 and earlier, these field update actions don't execute flows, so certain record updates don't trigger corresponding flows. Workflow rules and processes created via Process Builder are unaffected.

As a result of this change, flows now run slightly more often and whenever Apex runs. This difference is most apparent in the execution of time-based workflow and approvals. For other types of save operations, there's no impact.

Flow triggers are executed only one time per entity per transaction. Even a record update doesn't execute a flow trigger a second time on the same entity. Also, flow triggers are executed when you use the Data Import Wizard and specify to trigger workflow rules and processes when the imported records meet the criteria.

These changes provide for a more straightforward understanding of the different scenarios in which before- and after-save record-triggered flows execute. For example, now when a field update action occurs, it's easier to see when a flow executes.

A Flow Error Email Is Now Sent for an Update Record Element That References an Invalid Record Variable

An error email is sent if a flow executes an Update Record element that references an invalid record ID on a record variable. Previously, no flow error email was sent.

Other Changes to Flow Screen Components

We rebuilt the Checkbox Group component using Lightning Web Components (LWC). We also improved the run-time error behavior for custom Aura components. Flow Builder preview for the Dependent Picklists component is available only for objects that are supported in the User Interface API.

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.

Checkbox Group Component Is Rebuilt Using LWC

Now screen readers can read the labels associated with the Checkbox Group component. And the component is easier for Salesforce to support in all the places that can run screen flows. With a couple of exceptions, the Checkbox Group component looks and behaves the same as in previous releases.

For each Checkbox Group 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.
- When the user clicks the info bubble, the help text appears in a popover. Previously, the help text appeared upon hover or in a separate window when the user clicked the info bubble.



Some Custom Aura Component Errors Provide More Information and Status Change Events

For certain types of screen flow errors in most run-time environments, a window provides error and stack trace information that you can relay to the component developer. These types of run-time errors occur 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. The error window doesn't appear when the flow is launched from a custom web tab, a custom button or link, Flow Builder, the flow URL, or an Experience Builder site.

After you close the error window, you can still see the error information for the Aura component developer on the flow screen. The error message instructs the user to contact their Salesforce admin. Previously, the flow screen remained empty below the flow label.

The stack trace information is available only in the error window. After you close the error window, you can obtain the stack trace by restarting the flow to reproduce the error.

If you use the lightning:flow base Aura component to embed the screen flow in a custom Lightning component, these run-time errors no longer block status change events from firing. Now the onstatuschange action is triggered when the interview attempts to display the screen.

Flow Builder Preview of the Dependent Picklists Component Isn't Always Available

As you edit screens in Flow Builder, you can preview Dependent Picklist components for objects that are supported by the User Interface API. To see Dependent Picklist components for other objects, debug or run the flow.

SEE ALSO:

Salesforce Help: Flow Screen Input Component: Checkbox Group

Salesforce Help: Flow Screen Input Component: Dependent Picklists

Component Reference: lightning:flow

User Interface API Developer Guide: All Supported Objects

URL-Launched Screen Flows Use a White Background

When a screen flow is launched via a URL-based method, the screen background is now white to meet the contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1 Level AA. Previously, the background was gray. The background color change applies when flows are launched from a custom web tab, a custom button or link, Flow Builder, or the flow URL. This change doesn't apply when you're debugging flows.

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.

SEE ALSO:

Salesforce Help: Share the Flow URL or Create a Custom Button, Link, or Web Tab

Flow Management

Prepare for the transition to Flow Builder. Convert workflow rules to flows with the Migrate to Flow tool (beta).

IN THIS SECTION:

Convert Workflow Rules to Flows with the Migrate to Flow Tool (Beta)

We know it's a lot to process, but it's time to begin the transition to using Flow Builder, the future of low-code automation. Use the Migrate to Flow tool to convert your workflow rules into flows. Flow Builder can do everything that workflow rules can do—and more.

Convert Workflow Rules to Flows with the Migrate to Flow Tool (Beta)

We know it's a lot to process, but it's time to begin the transition to using Flow Builder, the future of low-code automation. Use the Migrate to Flow tool to convert your workflow rules into flows. Flow Builder can do everything that workflow rules can do—and more.

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

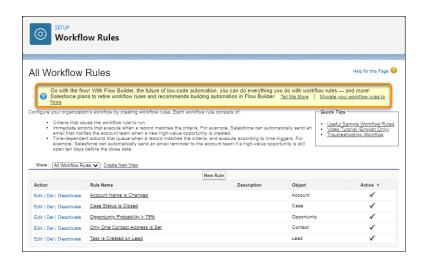


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Why: You can migrate workflow rules that contain these items:

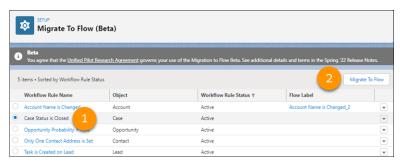
- Field-based criteria
- Field updates
- Email alerts
- Outbound messages
- Time-dependent workflow actions
- Rule criteria formula that's set to **true** (unless evaluation criteria is also set to **created, and any time it's edited to subsequently meet criteria**)

Gentle reminders are now included in workflow rules to prompt you to consider creating flows in Flow Builder instead of creating workflow rules.

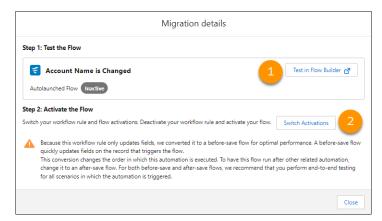




How: From Setup, in the Quick Find box, enter *Migrate to Flow*, and then select **Migrate to Flow (Beta)**. Or from Setup, on the workflow rules page, click **Migrate your workflow rules to flows**.



Select a workflow rule (1) and click Migrate to Flow (2).



Test your resulting flow in Flow Builder (1). Then deactivate the workflow rule that you converted to a flow and activate the new flow (2).

Flow Extensions

Manage Slack conversations and users from a flow with invocable actions (beta).

IN THIS SECTION:

Manage Conversations and Users in Slack with Invocable Actions (Beta)

Trigger changes to Slack conversations from a flow with new invocable actions. You can create and archive Slack channels. Check whether a user connected a Slack workspace to a Salesforce org. Invite users to a Slack channel. Send, edit, pin, and unpin Slack messages. And get information about Slack conversations.

Manage Conversations and Users in Slack with Invocable Actions (Beta)

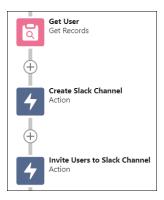
Trigger changes to Slack conversations from a flow with new invocable actions. You can create and archive Slack channels. Check whether a user connected a Slack workspace to a Salesforce org. Invite users to a Slack channel. Send, edit, pin, and unpin Slack messages. And get information about Slack conversations.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Slack apps, tools, and services that have been approved and installed by your Slack workspace owner are available for use in Slack desktop, mobile, and web apps.

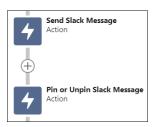


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

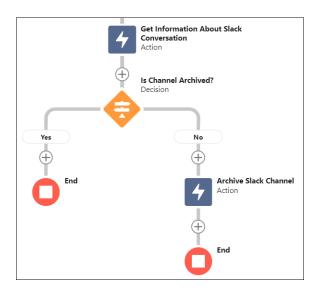
Why: Take the guesswork out of collaboration when something notable happens. For example, set up a flow that creates a Slack channel with the Create Slack Channel action each time a user creates an opportunity. Then, use the Invite Users to Slack Channel action to include all relevant stakeholders in the conversation.



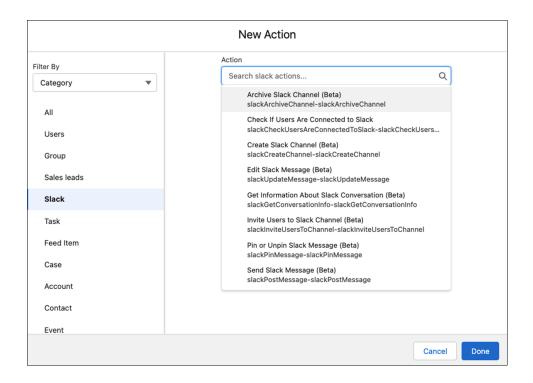
Send a Slack message with important information about the opportunity using the Send Slack Message action. Pin the message using the Pin or Unpin Slack Message action to ensure that new and existing channel members can find it.



Lastly, create a second flow that runs when the opportunity stage changes to Closed Won or Closed Lost. Check whether the channel is archived with the Get Information About Slack Conversation action. If the channel isn't archived, archive it with the Archive Slack Channel action. Otherwise, end the flow.



How: In Flow Builder, add an Action element to your flow. Then, select the **Slack** category, and search for an action.



SEE ALSO:

Metadata API

Manage Conversations and Users in Slack with Invocable Actions (Beta)

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 and is enforced in Spring '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 Summer '22, but we postponed the enforcement date to Spring '23.

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.

Run Flows in User Context via REST API (Release Update)

With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow. This update was first made available in Spring '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 and is enforced in Spring '22.

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

When: This update was first available in Spring '21 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

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

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 Summer '22, but we postponed the enforcement date to Spring '23.

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

When: This update is postponed to Spring '23. 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

Run Flows in User Context via REST API (Release Update)

With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow. This update was first made available in Spring '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 '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: Previously, a flow ran in system context when the flow was executed via REST API. A flow that runs in system context has permission to access and modify all data.

With this update, the flow runs in the context of the user who is authenticated via REST API. When the flow runs via REST API, the running user's profile and permission sets determine the object permissions and field-level access of the flow.

For example, the Update Account Type flow is run via REST API.

POST /v54.0/actions/custom/flow/Update Account Type

This update improves security in Salesforce by preventing you from unintentionally allowing users to create or edit records they don't have access to.

How: Enabling this update prevents flows that run via REST API from editing records that the running user doesn't have permission to edit.

To review this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Run Flows in User Context via REST API, follow the testing and activation steps.

SEE ALSO:

Release Updates

Flow and Process Release Updates

Einstein Next Best Action

Use Einstein Next Best Action to display recommendations and flow actions to your users. Recommendation strategy flows are now generally available, giving you the ability to build recommendation strategies using the actions and logic capabilities of Flow Builder.

IN THIS SECTION:

Build Einstein Next Best Action Strategies in Flow Builder (Generally Available)

Display a personalized list of recommendations to users while taking advantage of Flow Builder's features and structure.

Show Flow-Generated Recommendations on Lightning App Pages (Generally Available)

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 (Generally Available)

Display a personalized list of recommendations to users 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.

How: To create a strategy in Flow Builder, go to the Flows page in Setup and click **New Flow**.



Select the **All + Templates** tab (1), and then select the **Recommendation Strategy** category (2). Select the **Recommendation Strategy** flow type (3), and click **Create** (4).

When building a recommendation strategy, use the Get Records or Assignment elements to add your recommendations to the outputRecommendations collection variable. You can then display these recommendations to users on a Lightning page.



Note: Lightning pages only show recommendations that are in outputRecommendations.

SEE ALSO:

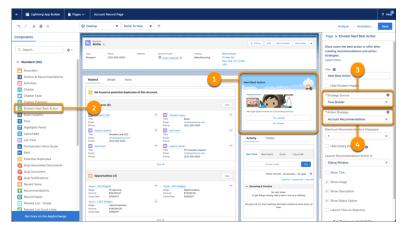
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After building a recommendation strategy in Flow Builder, display that strategy's recommendations on Lightning app pages. Just as you would with a strategy built in Strategy Builder, add an Einstein Next Best Action component to each Lightning app 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.

How: To use a recommendation strategy to display recommendations on a Lightning app page, 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**, and 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. Repeat this process to add an Einstein Next Best Action component to each Lightning app page.

Einstein Bots Release Notes Have Moved

Einstein Bots is now part of Service Cloud. Check out the Einstein for Service section for the latest and greatest bot features and enhancements.

SEE ALSO:

Einstein Bots

Experience Cloud

Freshen up your site list by archiving outdated sites that have outlived their usefulness, and make space for the shiny new sites that your users need. Create multilingual LWR sites to reach international audiences, and build LWR sites more quickly with new drag-and-drop components. You can also optimize your site's performance with several content delivery network (CDN) enhancements.



Tip: The recent rename to Experience Cloud introduced some new terminology, and it can be tricky to know what's what. Here's the rundown.

- Experience Builder sites, formerly called Lightning communities, are template-based sites that you customize in Experience Builder. And with the launch of the Lightning Web Runtime (LWR), we added two new terms for even greater clarity.
 - LWR sites are built with the latest LWR-based templates, such as the Build Your Own (LWR) template.
 - Aura sites are built with our original templates 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:

Archive Experience Cloud Sites (Generally Available)

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. Now you can use the Archive button on your site's detail page. 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. And if you change your mind, you can always unarchive the site.

Say Hello to the Digital Experiences App in Lightning Experience

After we started adding new Digital Experiences settings to the Salesforce CMS app in Lightning Experience, it didn't make sense to keep on calling it CMS anymore. So to keep in line with the Setup menu, we changed the name of the Salesforce CMS app to Digital Experiences. Now, in addition to managing your content, you can use this app to see your site's details and the underlying framework that it's using, and to archive or unarchive your site.

Support More Site Members with Experience Cloud Licenses

Customer Community licenses can now support 100+ million site members. Customer Community Plus and Partner Community licenses with account role optimization can support 10+ million site members.

LWR Sites

Create multilingual sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. Customize the look of your LWR sites with additional branding properties. And try out the latest beta features—improved site search and enhanced CMS workspaces.

Components in Experience Builder

Discover several new and enhanced drag-and-drop components for LWR and Aura sites.

Developer Productivity

Develop sites and custom components more efficiently with support for light DOM, localized component labels, and the @salesforce/site scoped module.

Site Performance

Optimize your site performance with several enhancements to the Salesforce CDN and the Service Not Available page. Use micro-batching to process self-registration on high-traffic sites more efficiently.

Guest User Security

See the latest release updates related to guest user security in your sites.

Security and Sharing

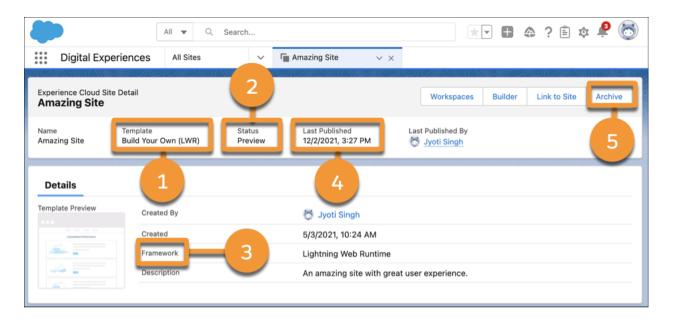
Simplify your users' login experience by configuring a Slack authentication provider, and prevent external users from viewing other users' personal information.

Archive Experience Cloud Sites (Generally Available)

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. Now you can use the Archive button on your site's detail page. 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. And if you change your mind, you can always unarchive the site.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature.

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** > **Digital Experiences** > **All Sites** after turning on CMS-related tabs for your profile.



The site detail page shows your site's template (1), its status (2), the underlying framework that it's using (3), when it was last published (4), and the button to archive or unarchive the site (5).

SEE ALSO:

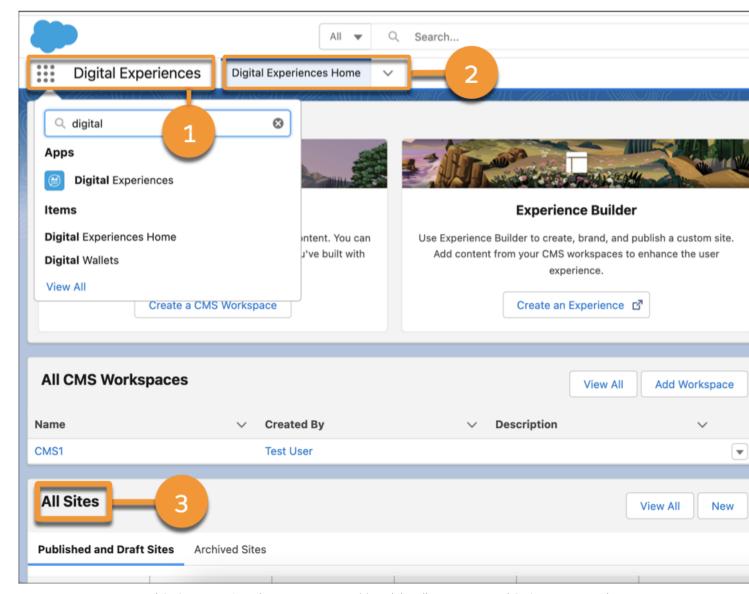
IdeaExchange: Allow System Admin to Delete Communities

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After we started adding new Digital Experiences settings to the Salesforce CMS app in Lightning Experience, it didn't make sense to keep on calling it CMS anymore. So to keep in line with the Setup menu, we changed the name of the Salesforce CMS app to Digital Experiences. Now, in addition to managing your content, you can use this app to see your site's details and the underlying framework that it's using, and to archive or unarchive your site.

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

How: Use the app launcher to access the Digital Experiences app (1).



For consistency, we renamed CMS Home to Digital Experiences Home (2), and the All Experiences and CMS Experiences tabs are now called All Sites (3).

Support More Site Members with Experience Cloud Licenses

Customer Community licenses can now support 100+ million site members. Customer Community Plus and Partner Community licenses with account role optimization can support 10+ million site members.

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: Experience Cloud can support a much larger scale of users per org for any of our license types if needed. Consult with your Salesforce account representative to find out if your site needs an in-depth review. If so, we can provide performance recommendations to ensure your site scales properly to meet your demands.

LWR Sites

Create multilingual sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. Customize the look of your LWR sites with additional branding properties. And try out the latest beta features—improved site search and enhanced CMS workspaces.

IN THIS SECTION:

Create Multilingual LWR Sites (Beta)

Say goodbye, arrivederci, sayonara, and au revoir to single-language Lightning Web Runtime sites. Now you can publish sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. Deliver content to your customers in the languages that they prefer, and reach new audiences in new languages. You can translate your LWR site into any language that Experience Cloud supports.

Style Your LWR Sites with New Branding Fonts

Declaratively style the look and branding of your LWR site using the complete library of Google fonts. You can then select from dynamic font styles, headings, and decorations for all types of text, including links and buttons. Local and custom fonts are still supported.

Specify the Base Font Sizes for Your LWR Mobile and Desktop Sites

You can now set different base font size values for your LWR mobile and desktop sites. And you can set the base font size unit in pixels or in rems.

Take Advantage of Improved Site Search and Enhanced CMS Workspaces (Beta)

With improved site search, visitors can look for content contained in components in sites created with the Build Your Own (LWR) template. We also reimagined Salesforce CMS workspaces to make it easier to create, manage, and publish content in a customizable architecture. Enjoy enhancements such as a refreshed content editor.

Create Multilingual LWR Sites (Beta)

Say goodbye, arrivederci, sayonara, and au revoir to single-language Lightning Web Runtime sites. Now you can publish sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. Deliver content to your customers in the languages that they prefer, and reach new audiences in new languages. You can translate your LWR site into any language that Experience Cloud supports.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.



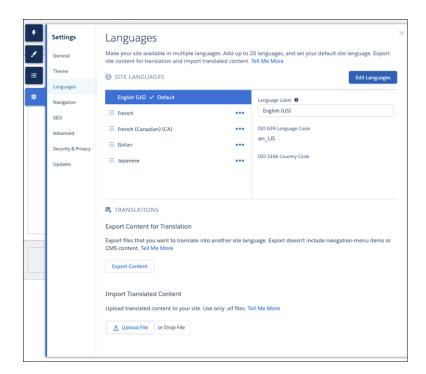
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: On standard Lightning web components in the LWR templates (Build Your Own and Microsite), translatable text-entry fields, such as titles and descriptions, are now defined as translatable="true". On custom Lightning web components, developers can specify translatable="true" in the component's js-meta.xml file for each text-entry property that you want to translate into other languages.

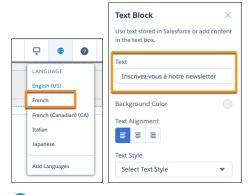


Note: If you populate the datasource attribute for a property, you can't define that property as translatable="true".

On the **Settings** > **Languages** page in Experience Builder, add your desired new languages to the Site Languages list. (LWR sites don't support right-to-left languages.) Then export the site content for translation, and when it's ready, import the translated file. Site content exports in the .xlf file format, which is compatible with third-party translation software.



Or, use the language selector in Experience Builder to switch to one of your added site languages, and enter your translations directly in the component property panels.





• Exported site content excludes CMS content and the items in the site's navigation menu. To set up a multilingual LWR site, translate this content separately.

Some base Lightning components don't support localization and aren't compatible with multilingual sites.

SEE ALSO:

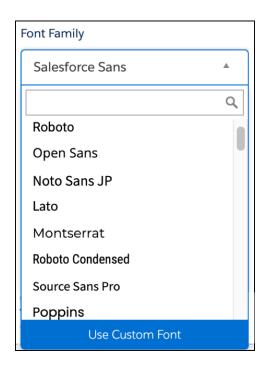
LWR Sites for Experience Cloud: Create a Multilingual LWR Site (Right-click to view in a new tab or window.)

Style Your LWR Sites with New Branding Fonts

Declaratively style the look and branding of your LWR site using the complete library of Google fonts. You can then select from dynamic font styles, headings, and decorations for all types of text, including links and buttons. Local and custom fonts are still supported.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: From **Experience Builder** > **Theme** > **Text**, choose from the new font family options. A preview of each font is displayed. 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 Lightning web components that use the hooks associated with that property are automatically updated.



SEE ALSO:

LWR Sites for Experience Cloud: Add Custom Fonts

Specify the Base Font Sizes for Your LWR Mobile and Desktop Sites

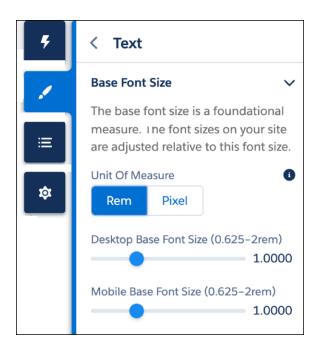
You can now set different base font size values for your LWR mobile and desktop sites. And you can set the base font size unit in pixels or in rems.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Pixels define font size, but a pixel is an absolute unit that doesn't adapt to different browsers or devices. Rem is a responsive unit that users can set, and it shows font size relative to the default browser font size. Rem enhances accessibility by improving site responsiveness to user preferences.

Rem is now the default base font size for new mobile and desktop sites. Pixels remain the base font size unit for existing sites.

How: Specify the base font size unit and value for your mobile and desktop sites from **Experience Builder** > **Theme** > **Text** .



Take Advantage of Improved Site Search and Enhanced CMS Workspaces (Beta)

With improved site search, visitors can look for content contained in components in sites created with the Build Your Own (LWR) template. We also reimagined Salesforce CMS workspaces to make it easier to create, manage, and publish content in a customizable architecture. Enjoy enhancements such as a refreshed content editor.

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

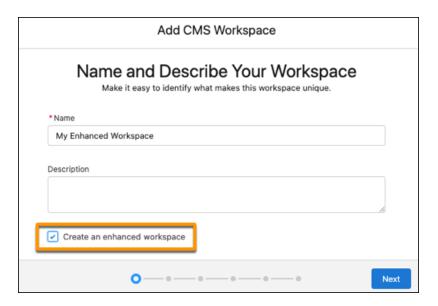


Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: To start using the beta features, from Setup, in the Quick Find box, enter *Digital Experiences*, and then click **Settings**. Select **Turn on beta features**, and save your changes.

Then create a site with the Build Your Own (LWR) template. You can access improved site search and share content from enhanced workspaces only with Build Your Own (LWR) sites created in Spring '22 or later.

When creating a workspace in the newly renamed Digital Experiences app, select **Create an enhanced workspace**. After you add content in the enhanced workspace, you can share it with the new Build Your Own (LWR) site.



In Experience Builder, you can use several components, such as the new Overlap and Card components, to include the CMS content in your site pages. After you set up improved site search, content contained in the components is returned in search results on the live site.

Connect REST API and Connect in Apex support site search and enhanced CMS workspaces (beta).

SEE ALSO:

Site Search & Enhanced CMS Workspaces (Beta) (Right-click to view in a new tab or window.)

Components in Experience Builder

Discover several new and enhanced drag-and-drop components for LWR and Aura sites.

IN THIS SECTION:

Let Your Site Users Deactivate Their Account

The Customizable User Settings component includes new properties that let your users deactivate their account from within Aura sites.

Use the Overlap, Card, Columns, and Language Selector Components in LWR Sites

The Microsites and Build Your Own (LWR) templates include a whole slew of new components. The new layout components, Overlap and Card, provide your site designers more options to create visually compelling sites. The Language Selector component gives your users the flexibility to change the site language. And in the Build Your Own template, the Columns component lets site designers use columns to showcase content.

Override Default HTML Tags in the Text Block Component

When you add the Text Block component to an LWR site, you set a text style that affects the look and feel of the content. Text styles are set in the Text area of the template's overall branding. Each text style is associated with a default HTML tag. For example, the Extra Large style has an h1 HTML tag. Now you can select the Override style's default HTML tag and change the tag to any option from h1–h6 or to p. Allowing site creators to select different HTML tags helps with accessibility, especially for users with screen readers.

Build Better Microsites with the Marketing Cloud Form Component (Generally Available)

Send contact information gathered in Experience Cloud microsites directly to Marketing Cloud data extensions with the Marketing Cloud Form component. With one click, share data seamlessly between clouds.

Improve Site Performance with the Updated Lead Form Component

The Lead Form component is getting a remodel. Using micro-batching technology, your site can now handle up to 12,000 form requests per minute. Provide improved submission speed and a clean experience to your end users without changing a thing.

Autoplay CMS Collections in Aura Sites

Ensure that your users can experience all of your thoughtfully curated slide content. Autoplay for the CMS Collection component cycles through all slides in a selected collection. Previously, users advanced the slides manually.

Embed Multiclass Predictions with the Updated Einstein Predictions Component

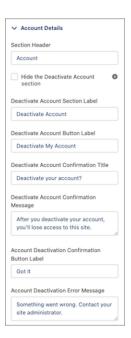
Now you can embed predictions from multiclass classification models directly in Experience Cloud sites pages. Multiclass models predict the most likely outcome from 3 to 10 possible outcomes. For example, if you offer eight insurance policies, use a multiclass model to predict which policy a new customer will likely purchase.

Let Your Site Users Deactivate Their Account

The Customizable User Settings component includes new properties that let your users deactivate their account from within Aura sites.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: First, to allow your users to deactivate their account, in User Management Settings in Setup, enable **User Self Deactivate**. Then, in Experience Builder, configure the new Account Details properties of the Customizable User Settings component. Make sure to deselect the **Hide the Deactivate Account section** checkbox, so that your users can see the Deactivate My Account button.





Note: If you're creating an iOS Mobile Publisher for Experience Cloud app, we recommend that you customize the Deactivate Account Button label, and other Deactivate Account user settings, to use the term <code>Delete</code> rather than <code>Deactivate</code>. This customization ensures that you meet Apple's Account Deletion requirements.

After a user deactivates their account, consider deleting all the user's data stored in the Salesforce platform. Follow your local data protection and privacy regulations.

SEE ALSO:

Salesforce Help: Customizable User Settings
Salesforce Help: Enable User Self-Deactivation

Use the Overlap, Card, Columns, and Language Selector Components in LWR Sites

The Microsites and Build Your Own (LWR) templates include a whole slew of new components. The new layout components, Overlap and Card, provide your site designers more options to create visually compelling sites. The Language Selector component gives your users the flexibility to change the site language. And in the Build Your Own template, the Columns component lets site designers use columns to showcase content.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Override Default HTML Tags in the Text Block Component

When you add the Text Block component to an LWR site, you set a text style that affects the look and feel of the content. Text styles are set in the Text area of the template's overall branding. Each text style is associated with a default HTML tag. For example, the Extra Large style has an h1 HTML tag. Now you can select the Override style's default HTML tag and change the tag to any option from h1–h6 or to p. Allowing site creators to select different HTML tags helps with accessibility, especially for users with screen readers.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Build Better Microsites with the Marketing Cloud Form Component (Generally Available)

Send contact information gathered in Experience Cloud microsites directly to Marketing Cloud data extensions with the Marketing Cloud Form component. With one click, share data seamlessly between clouds.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic. The Marketing Cloud Form component is available in LWR sites when you purchase Salesforce CMS in Enterprise, Performance, Unlimited, and Developer editions.

Connect REST API and Connect in Apex support Microsites with Marketing Cloud forms.

Improve Site Performance with the Updated Lead Form Component

The Lead Form component is getting a remodel. Using micro-batching technology, your site can now handle up to 12,000 form requests per minute. Provide improved submission speed and a clean experience to your end users without changing a thing.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic. The Lead Form component is available in LWR sites when you purchase Salesforce CMS in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Use Micro-Batching to Process More Self-Registrations on High-Traffic Sites (Generally Available)

Autoplay CMS Collections in Aura Sites

Ensure that your users can experience all of your thoughtfully curated slide content. Autoplay for the CMS Collection component cycles through all slides in a selected collection. Previously, users advanced the slides manually.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Assign your CMS Collection component a Carousel, Strip, or Slideshow layout, and then select **Autoplay slides**. To personalize the flow, add a Pause Button and use the Progression Pace slider to configure slide display duration.



SEE ALSO:

Salesforce Help: CMS Collection (Right-click to view in a new tab or window.) *IdeaExchange*: CMS - Auto play the carousel, CMS Collections

Embed Multiclass Predictions with the Updated Einstein Predictions Component

Now you can embed predictions from multiclass classification models directly in Experience Cloud sites pages. Multiclass models predict the most likely outcome from 3 to 10 possible outcomes. For example, if you offer eight insurance policies, use a multiclass model to predict which policy a new customer will likely purchase.

Where: This change applies to Aura sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Embed Multiclass Predictions Using the Einstein Predictions Panel

Developer Productivity

Develop sites and custom components more efficiently with support for light DOM, localized component labels, and the @salesforce/site scoped module.

IN THIS SECTION:

Track Events on LWR Sites in Standard Components Enabled with Light DOM

Before Spring '22, standard Lightning web components in the Build Your Own (LWR) and Microsite templates rendered in shadow DOM by default, making it difficult to integrate third-party analytics services. Now these LWR templates and several of their components are light DOM enabled. In Lightning web components enabled with light DOM, you can query DOM elements from the document root, which facilitates DOM traversal. You can listen for events within these components and send the events to multiple third-party analytics services, such as Google Analytics.

Build Localized Component Labels on LWR Sites with Custom Labels

Use the expression {!Label.namespace.name} to define a label's value when you specify labels in Experience Builder. Use the expression in any component that has a text input field: Button, HTML Editor, Rich Content Editor, or Text Block.

Get Information About the Current Site in Lightning Web Components

Use the <code>@salesforce/site</code> scoped module when developing custom Lightning web components to import information about the current site, including the site ID and active languages.

Quickly Bind Data to Components in ExperienceBundle

LWR sites have components that support binding data from Salesforce CMS. ExperienceBundle now supports component-level data providers, making it easier to bind data to components in your LWR sites. Because the metadata is exposed in ExperienceBundle, you can move the component-level data providers between different orgs, such as from a sandbox to production or two different Salesforce orgs. Previously, the metadata wasn't enabled in ExperienceBundle.

Troubleshoot Deployment Errors More Easily

To help you identify issues when deploying a site using ExperienceBundle, clearer explanations now accompany deployment error messages. If you encounter a problem, the error message includes more detail on the location of the issue and the steps that you can take to resolve it.

Track Events on LWR Sites in Standard Components Enabled with Light DOM

Before Spring '22, standard Lightning web components in the Build Your Own (LWR) and Microsite templates rendered in shadow DOM by default, making it difficult to integrate third-party analytics services. Now these LWR templates and several of their components are light DOM enabled. In Lightning web components enabled with light DOM, you can query DOM elements from the document root, which facilitates DOM traversal. You can listen for events within these components and send the events to multiple third-party analytics services, such as Google Analytics.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: These standard Lightning web components are light DOM enabled.

- Tile Menu
- Banner
- Button
- Horizontal Line
- Image
- Text Block
- Tile
- Video
- Card
- Overlap

- Language Selector
- Lead Form
- Marketing Cloud Form
- Header (Microsite template only)
- Navigation Menu (Microsite template only)
- Theme Layout

To take advantage of light DOM on an existing LWR site, republish the site.



Note: The Lead Form and Marketing Cloud Form components are available in the Build Your Own (LWR) template when you purchase Salesforce CMS.

SEE ALSO:

Enable Third-Party Integrations with Light DOM (Beta)

Build Localized Component Labels on LWR Sites with Custom Labels

Use the expression {!Label.namespace.name} to define a label's value when you specify labels in Experience Builder. Use the expression in any component that has a text input field: Button, HTML Editor, Rich Content Editor, or Text Block.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: In Setup, create a translated custom label. For more information, see Translate Custom Labels. Then use the label expression {!Label.namespace.name} in the component in Experience Builder to see the translated labels. If you don't have a corresponding translated label, you see an error message.



Get Information About the Current Site in Lightning Web Components

Use the @salesforce/site scoped module when developing custom Lightning web components to import information about the current site, including the site ID and active languages.

Where: This change applies to Lightning web components used in LWR and Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Quickly Bind Data to Components in ExperienceBundle

LWR sites have components that support binding data from Salesforce CMS. ExperienceBundle now supports component-level data providers, making it easier to bind data to components in your LWR sites. Because the metadata is exposed in ExperienceBundle, you can move the component-level data providers between different orgs, such as from a sandbox to production or two different Salesforce orgs. Previously, the metadata wasn't enabled in ExperienceBundle.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: You can have only one dxp:dataProvidersin the array. The contentKey is a string that you can change to any content key in CMS that is shared with the site. The other parameters are locked.

```
"dxp:dataProviders" : [ {
    "componentAttributes" : {
        "contentKey": "MCUHCU4LYM45HKVHRKGBHQCNX3AI",
        "sfdcExpressionKey" : "Item",
        "sfdcType" : {
            "fqn" : "cms_image",
            "type" : "cms"
        }
    },
    "componentName" : "dxp/cmsDataProvider"
    } ],
```

Troubleshoot Deployment Errors More Easily

To help you identify issues when deploying a site using ExperienceBundle, clearer explanations now accompany deployment error messages. If you encounter a problem, the error message includes more detail on the location of the issue and the steps that you can take to resolve it.

Where: This change applies to LWR and Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: If you receive an error message that's still unclear or unhelpful, let us know by opening a case with Salesforce Customer Support. Include the prefix [exp-bundle-error] in the subject line. For example:

```
[exp-bundle-error] Null Pointer Exception
```

Site Performance

Optimize your site performance with several enhancements to the Salesforce CDN and the Service Not Available page. Use micro-batching to process self-registration on high-traffic sites more efficiently.

IN THIS SECTION:

Get the Service Not Available Page by Default with Salesforce's CDN for Digital Experiences

The Service Not Available (SNA) page is automatically enabled for sites using enhanced domains and Salesforce's CDN for Digital Experiences. You can customize the page to fit your brand, or use it as is. Integrate the SNA page with Email-to-Case or email-to-object AppExchange packages to ensure business continuity when your site is down.

Stay on the Target URL When Using the Service Not Available Page

During site outages, keep users on the same web address instead of redirecting them to a Service Not Available page on a different URL. When the site is back up, users are only a refresh away from where they want to be.

Account Role Optimization Is On by Default for Role-Based Licenses

Maximize the number of users on your site without creating unnecessary roles. New sites using Customer Community Plus, Partner Community, or External Apps licenses are automatically enabled for account role optimization (ARO). ARO is also on by default for orgs that haven't yet enabled Digital Experiences.

Label for Account Role Optimization Setting Was Changed

The label to enable Account Role Optimization (ARO) is now Minimize the number of roles created, which improves performance by cutting down processing loads.

Switch from Shared to Single Certificates for Sites

Sites that are using a shared certificate for Salesforce's CDN for Digital Experiences can now switch to a single certificate without downtime. Single certificates provide better security and a single-branded environment. New sites use a single certificate by default.

Put Your Site in Maintenance Mode While Making Updates

When making updates to your site, you can display a branded Service Not Available page on your site to non-admin and customer users. Admins can still access the site, make updates, and see the changes in real time. When you're done making updates, activate your site to display the changes.

Use Micro-Batching to Process More Self-Registrations on High-Traffic Sites (Generally Available)

Micro-batching is ideal for sites that expect more than 500,000 self-registration requests per day, such as for vaccine scheduling, event ticketing, or high-volume commerce. Self-registration requests are collected and processed in batches for efficient handling. When a user submits a self-registration request on the site, it's collected into a small batch of requests. After the batch is processed successfully, users receive an email with their login instructions.

Cache More Guest User and Static Content with Salesforce's CDN for Digital Experiences

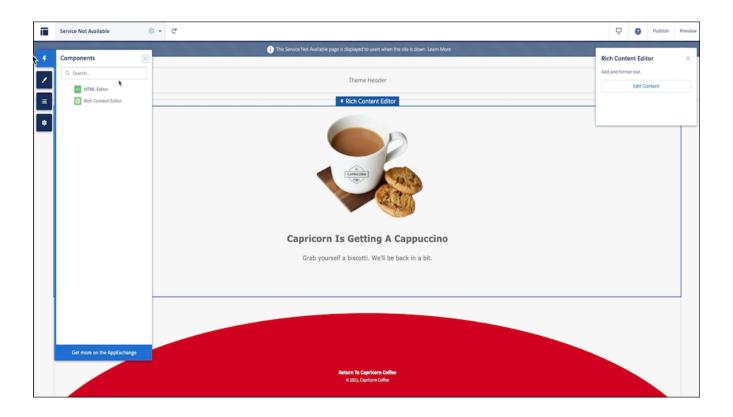
More Lightning Web Runtime guest user and static content is being cached on Salesforce's CDN for Digital Experiences, making the sites faster and more scalable.

Get the Service Not Available Page by Default with Salesforce's CDN for Digital Experiences

The Service Not Available (SNA) page is automatically enabled for sites using enhanced domains and Salesforce's CDN for Digital Experiences. You can customize the page to fit your brand, or use it as is. Integrate the SNA page with Email-to-Case or email-to-object AppExchange packages to ensure business continuity when your site is down.

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.

Why: The Service Not Available page is enabled for all sites that use Salesforce's CDN for Digital Experiences.



Stay on the Target URL When Using the Service Not Available Page

During site outages, keep users on the same web address instead of redirecting them to a Service Not Available page on a different URL. When the site is back up, users are only a refresh away from where they want to be.

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.

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Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Label for Account Role Optimization Setting Was Changed

The label to enable Account Role Optimization (ARO) is now Minimize the number of roles created, which improves performance by cutting down processing loads.

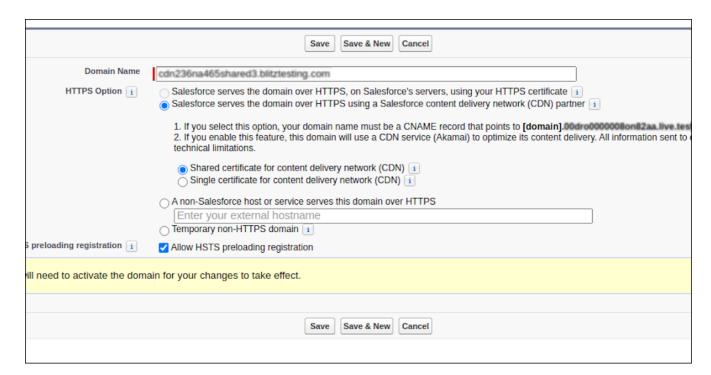
Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Switch from Shared to Single Certificates for Sites

Sites that are using a shared certificate for Salesforce's CDN for Digital Experiences can now switch to a single certificate without downtime. Single certificates provide better security and a single-branded environment. New sites use a single certificate by default.

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: Select Single certificate for content delivery network (CDN).

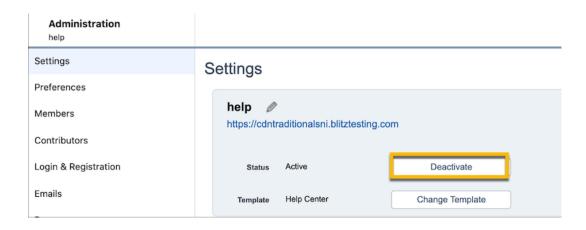


Put Your Site in Maintenance Mode While Making Updates

When making updates to your site, you can display a branded Service Not Available page on your site to non-admin and customer users. Admins can still access the site, make updates, and see the changes in real time. When you're done making updates, activate your site to display the changes.

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. Enable Salesforce's CDN for Digital Experiences to use this feature.

How: Click **Deactivate** to put your site in maintenance mode.



SEE ALSO:

IdeaExchange: Maintenance Mode for Communities

Salesforce Help: Use a Custom Service Not Available Page for Your Experience Builder Site (Right-click to view in a new tab or window.)

Use Micro-Batching to Process More Self-Registrations on High-Traffic Sites (Generally Available)

Micro-batching is ideal for sites that expect more than 500,000 self-registration requests per day, such as for vaccine scheduling, event ticketing, or high-volume commerce. Self-registration requests are collected and processed in batches for efficient handling. When a user submits a self-registration request on the site, it's collected into a small batch of requests. After the batch is processed successfully, users receive an email with their login instructions.

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. Sites with Customer Community Plus and Partner Community licenses must enable account role optimization in order to use this feature. Connect REST API supports micro-batching.

Cache More Guest User and Static Content with Salesforce's CDN for Digital Experiences

More Lightning Web Runtime guest user and static content is being cached on Salesforce's CDN for Digital Experiences, making the sites faster and more scalable.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Guest User Security

See the latest release updates related to guest user security in your sites.

IN THIS SECTION:

Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users (Release Update)

To improve the security of your data, Salesforce is removing permission set licenses that contain View All, Modify All, edit, and delete object permissions and their associated permission sets from guest users. The only object permissions allowed for guest users are read and create. Going forward, you can no longer assign guest users permission sets that are associated with these permission set licenses and contain the restricted permissions. This update was first made available in Spring '22.

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 is enforced in Summer '22. The Spring '22 enforcement date shown in the UI is incorrect.

Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users (Release Update)

To improve the security of your data, Salesforce is removing permission set licenses that contain View All, Modify All, edit, and delete object permissions and their associated permission sets from guest users. The only object permissions allowed for guest users are read and create. Going forward, you can no longer assign guest users permission sets that are associated with these permission set licenses and contain the restricted permissions. This update was first made available in Spring '22.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: Starting in Spring '22, you can no longer assign guest users permission sets associated with the permission set licenses and that contain View All, Modify All, edit, and delete object permissions. In Winter '23, Salesforce enforces this update and removes permission set licenses and their related permission sets from guest users. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This update protects the security of your data by preventing guest users from being entitled to object permissions not required for their business needs.

How: Customizations, such as workflows, that rely on guest users being entitled to or granted these object permissions can be affected after this change. To prevent disruptions in functionality, we recommend that you review and remove overly permissive licenses and permission sets from guest users before the Winter '23 release. In the Summer '22 release, some replacement permission set licenses that are intended for guest users and that contain only the allowed permissions become available.

To review this update, from Setup, in the Quick Find box, enter Release Updates, and then select **Release Updates**. For Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users, follow the testing and activation steps.

SEE ALSO:

Release Updates

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 is enforced in Summer '22. The Spring '22 enforcement date shown in the UI is incorrect.

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 wasn't applied to products in Spring '22. This update is enforced in Summer '22.

SEE ALSO:

Create Sharing Rules to Retain and Control Guest Users' Access to Products (Release Update)

Security and Sharing

Simplify your users' login experience by configuring a Slack authentication provider, and prevent external users from viewing other users' personal information.

IN THIS SECTION:

Set Up Single Sign-On with Slack Credentials

Improve your customers' login experience by configuring a Slack authentication provider. You can let your customers log in to Salesforce with Slack credentials and access Slack data in Salesforce.

Secure Personal Information Fields from External and Guest Users via Field Set

To prevent external users, such as portal or community users, from viewing personal information in your user records, enable the Enhanced Personal Information Management permission. When you enable this permission, Salesforce blocks 30 personal information fields using a field set called PersonalInfo_EPIM. You can choose which fields to include in the field set. Previously, admins managed which personal information fields are visible by using ComplianceCategory on the object.

Grant Access to HVU or System User Records in Criteria-Based Sharing Rules

Choose whether to include records owned by high-volume community or system users when you create criteria-based sharing rules.

Share Market Development Fund Data

You can now share data via sharing sets for budgets, allocations, requests, and claims.

HSTS Browser Cache Duration Is Increased

To adopt the latest recommendations for HTTP Strict Transport Security (HSTS) preloading deployment, we increased the HSTS header max-age value to 2 years.

Run Flows for Guest Users Is Being Deprecated

In Winter '22, we discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. Use the more granular permission structure embedded in Flows and give your users the specific access that they need. Run Flows will be removed from the Guest User Profile in all orgs in Spring '23. To ensure that guest and external users don't lose access to flows, update your existing sites to the new permission structure before Spring '23.

Set Up Single Sign-On with Slack Credentials

Improve your customers' login experience by configuring a Slack authentication provider. You can let your customers log in to Salesforce with Slack credentials and access Slack data in Salesforce.

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:

Let Users Access Salesforce with Slack Credentials

Secure Personal Information Fields from External and Guest Users via Field Set

To prevent external users, such as portal or community users, from viewing personal information in your user records, enable the Enhanced Personal Information Management permission. When you enable this permission, Salesforce blocks 30 personal information fields using a field set called PersonalInfo_EPIM. You can choose which fields to include in the field set. Previously, admins managed which personal information fields are visible by using ComplianceCategory on the object.

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

Why: The default field set masks these fields from external users. If the Name field is considered personally identifiable, external and guest users see Nickname if the Show Nicknames preference is enabled for your Experience Cloud site. If you enabled Enhanced Personal Information Management before Spring '22, follow the instructions at Manage Personal User Information Visibility for External Users to manage which personal information fields are visible.

- About Me
- Alias
- City
- Company Name
- Country
- Department
- Division
- Email
- Email Sender Address
- Email Sender Name
- Email Signature
- Employee Number
- Extension
- Fax
- First Name
- Geocode Accuracy
- Last Name
- Latitude
- Longitude
- Manager
- Mobile
- Name
- Phone
- Postal Code
- SAML Federation ID
- State
- Street
- Title
- User Photo badge text overlay
- Username

How: From Setup, in the Quick Find box, enter User Management Settings, and then select User Management Settings. If Hide Personal Information is enabled, deselect it. Enable **Enhanced Personal Information Management**.

Conceal a user field by adding it to a field set in the Object Manager. Drag the field into the PersonalInfo EPIM field set, and save your



Note: When you enable Enhanced Personal Information Management, guest users lose access to their own PII fields. For example, quest users can't see their own email information.

SEE ALSO:

Salesforce Help: Manage Personal User Information Visibility for External Users (Right-click to view in a new tab or window.)

Salesforce Help: Personal User Information Considerations (Right-click to view in a new tab or window.)

Salesforce Help: About Field Sets (Right-click to view in a new tab or window.)

Salesforce Help: Creating and Editing Field Sets (Right-click to view in a new tab or window.)

Grant Access to HVU or System User Records in Criteria-Based Sharing Rules

Choose whether to include records owned by high-volume community or system users when you create criteria-based sharing rules.

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

Who: This option is available only if you have high-volume or system users. High-volume or system users include the External Apps, Customer Community, High Volume Customer Portal, and Authenticated Website license types.

How: From Setup, in the Quick Find box, enter Sharing Settings, and then select Sharing Settings. In the Sharing Rules related list for the object, click **New** and select the user access, based on criteria rule type. When you create a criteria-based sharing rule, make sure that **Include records owned by users who can't have an assigned role** is selected.

SEE ALSO:

About High-Volume Community or Site Users Create Criteria-Based Sharing Rules

Share Market Development Fund Data

You can now share data via sharing sets for budgets, allocations, requests, and claims.

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.

HSTS Browser Cache Duration Is Increased

To adopt the latest recommendations for HTTP Strict Transport Security (HSTS) preloading deployment, we increased the HSTS header max-age value to 2 years.

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:

HTTP Strict Transport Security (HSTS) Cache Duration Is Increased

Run Flows for Guest Users Is Being Deprecated

In Winter '22, we discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. Use the more granular permission structure embedded in Flows and give your users the specific access that they need. Run Flows will be removed from the Guest User Profile in all orgs in Spring '23. To ensure that guest and external users don't lose access to flows, update your existing sites to the new permission structure before Spring '23.

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? (Right-click to view in a new tab or window.)

Field Service

Use the Field Service learning map to navigate setup tasks and find the right help. Onboard faster with the Key Concepts and Glossary. Create more efficient schedules with bundled service appointments that group nearby work, and use the REST APIs to make the bundler changes you need. Shift enhancements help managers balance assignments and accommodate worker preferences, as well as update shifts in bulk. Add flexible criteria-based preventive maintenance plans to keep your assets in shape. Briefcase Builder and related records priming help save time by letting you choose only what you need to download before going offline.

IN THIS SECTION:

Spotlight on Field Service Content

Let the Field Service learning map be your guide! Find resources to navigate setup tasks and get going on the road to Field Service success. Discover new and updated content, such as the Key Concepts and Glossary that summarizes important Field Service terms.

Field Service Resource Management

Combine several service appointments into a bundle so that mobile workers can focus on the big picture. Improve mobile workers' privacy by controlling who can see their location. Add color-coding to shifts and quickly update a shift's status or assigned resource. Update the Field Service Settings page to use more inclusive language.

Field Service Asset Management

Use maintenance work rules to schedule preventive maintenance for your assets to avoid downtime.

Field Service Administration and Processes

Ensure that each of your customer's requirements are being met by adding the rules they maintain to the appointments they schedule.

Field Service Customer Engagement

Use Visual Remote Assistant to engage via video, request a remote support session, and improve your two-way video meeting experience.

Field Service Mobile

Bundled service appointments and automatic status updates ease the busy work, so mobile workers can get more done on the job. Related Records priming also saves time by letting mobile workers choose only the records they need before going offline.

Field Service REST API

Use the Appointment Bundling REST APIs to manage your bundles.

Spotlight on Field Service Content

Let the Field Service learning map be your guide! Find resources to navigate setup tasks and get going on the road to Field Service success. Discover new and updated content, such as the Key Concepts and Glossary that summarizes important Field Service terms.

IN THIS SECTION:

Chart a Successful Journey with the Field Service Learning Map

Get Field Service set up and discover new possibilities with curated resources from Salesforce experts. The learning map is for admins, customers, partners, or anyone who wants to learn more and do more with Field Service.

Understand Key Concepts and Common Terms in Field Service

Find definitions for frequently used terms in the Key Concepts and Glossary. Review the key concepts for an overview of Field Service and use the glossary to look up terms.

Chart a Successful Journey with the Field Service Learning Map

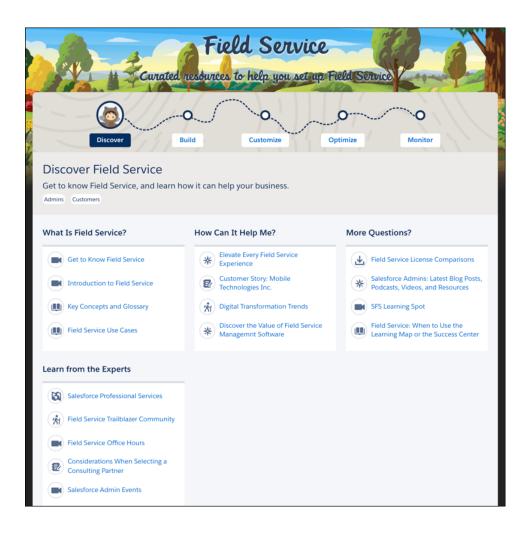
Get Field Service set up and discover new possibilities with curated resources from Salesforce experts. The learning map is for admins, customers, partners, or anyone who wants to learn more and do more with Field Service.

Where: Bookmark the Field Service learning map (English only) to return to it again.

How: The map directs you to resources for five key steps in the Field Service journey.

- 1. Discover Field Service and learn how it can help you.
- 2. Build Field Service with steps that consider setup dependencies.
- **3.** Customize Field Service to meet the needs of your team.
- 4. Optimize your schedule to make the most out of appointment times.
- **5.** Monitor and troubleshoot Field Service issues to keep everything running smoothly.

Click each step on the path at the top of the map to see resources for that step.



Understand Key Concepts and Common Terms in Field Service

Find definitions for frequently used terms in the Key Concepts and Glossary. Review the key concepts for an overview of Field Service and use the glossary to look up terms.

SEE ALSO:

Salesforce Help: Field Service Key Concepts and Glossary (Right-click to view in a new tab or window.)

Field Service Resource Management

Combine several service appointments into a bundle so that mobile workers can focus on the big picture. Improve mobile workers' privacy by controlling who can see their location. Add color-coding to shifts and quickly update a shift's status or assigned resource. Update the Field Service Settings page to use more inclusive language.

IN THIS SECTION:

Bundle Your Service Appointments to Simplify Scheduling

Group short appointments at nearby or same-site locations to create a bundle. Then assign a mobile worker to perform all the bundled appointments in one go. Bundles can be created manually or by an automated process.

Use Colors to Find Shifts Fast

When your team creates shifts, they can assign background colors to represent different shift types, such as for certain job profiles. Shift managers can also add background colors to shift templates so that they can create color-coded shifts in a snap. Background colors appear in the shift calendar and the dispatcher console Gantt.

Be a Scheduling Hero and Quickly Find Shift Candidates

Let shift managers easily find and assign a service resource using the Get Candidates action. Shift managers can create a fair and well-balanced shift schedule using objectives and rules that take workers' preferred hours into account. For example, a scheduling rule can limit the number of work hours per day, week, or month. Get Candidates then accounts for worker preferences and other constraints, like limiting nonstandard shifts.

Save Time with Mass Shift Updates

With just a few clicks, your shift managers can update shifts in bulk. They can create a background task that assigns agents, updates shift statuses, or does both on a batch of shifts. When updating shifts in bulk, all scheduling rules, objectives, and resource preferences are taken into account.

Limit Nonstandard Shifts and Boost Your Team's Work-Life Balance

Help shift managers equitably schedule shifts and improve their team's well-being. See at a glance which shifts are inconvenient or undesirable by marking shifts as nonstandard. A red icon in the shift calendar and dispatcher console shows which shifts are nonstandard. Shift managers can also create scheduling rules and constraints that limit how many nonstandard shifts are assigned to service resources.

Tighten Your Service Resources' Security by Hiding Their Location

Fine-tune privacy protection by controlling who can see the whereabouts of mobile workers. Assign permissions to hide live positions and actual routes from the dispatcher console map and resource map. You can also hide the last-seen time indicators from the Gantt.

Reduce CPU Usage While You're Inactive

Stepped away from the dispatcher console? Reload the page when you return to continue. User idle time is now monitored to reduce unnecessary Gantt refreshes and improve computer performance.

Field Service Settings Tab Uses More Inclusive Language

Same only better! As part of our effort to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. The FSL_Master_Settings tab name is now called FSL_Field_Service_Settings. New Salesforce orgs already benefit from this update. Existing orgs must replace the tab.

Define Resource Preference Based on Location and Assets

Assign a preferred worker to a service appointment where preference is based on location, asset, or account. Now, a resource preference is automatically set for work orders and work order line items based on the resource preference listed in the asset, the location, or the account. Previously, resource preferences were set only on work orders based on their account's preference.

Create Recurring Absences for Service Resources

Save by time by scheduling a set of routine absences for your mobile worker, such as a meeting or recuring medical appointment. Create absences that recur on a daily, weekly, or monthly schedule. Set an end date for the absence, or set the number of absence occurrences.

Ensure a Smooth Dispatcher Console Experience When Calling Visualforce Remoting API

Be ready for Visualforce Remoting API. The Visualforce Remoting API uses JavaScript to call methods in Apex controllers directly from Visualforce pages. To ensure that the API is properly secured, we added stricter call validation in Spring '21. As a result of this update, you must enable the FSL.ctrl001_Gantt Apex Class for all Gantt user profiles.

Service Appointment Status Updates Are No Longer Unlimited

When your users update service appointment statuses, the number of ServiceAppointmentShare records that can be processed in a single batch is now limited to 50,000 records. If you exceed the limit, you receive an error, and the changes aren't saved. Most customers don't notice an impact.

Bundle Your Service Appointments to Simplify Scheduling

Group short appointments at nearby or same-site locations to create a bundle. Then assign a mobile worker to perform all the bundled appointments in one go. Bundles can be created manually or by an automated process.

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

How: Enable Appointment Bundling in Field Service Settings, add the required permissions, and configure the service appointment bundling policies.

SEE ALSO:

Salesforce Help: Set Up Service Appointment Bundling (Right-click to view in a new tab or window.)

Manage Your Bundles Using APIs (Right-click to view in a new tab or window.)

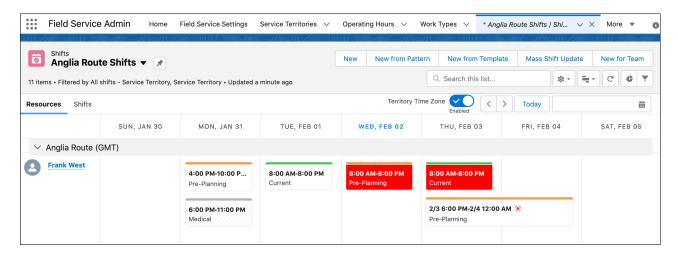
Salesforce Video: What is the Service Appointment Bundler?

Use Colors to Find Shifts Fast

When your team creates shifts, they can assign background colors to represent different shift types, such as for certain job profiles. Shift managers can also add background colors to shift templates so that they can create color-coded shifts in a snap. Background colors appear in the shift calendar and the dispatcher console Gantt.

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

How: Give shift managers more ways to customize the schedule view. Select a background color in a single shift or in a shift template.



SEE ALSO:

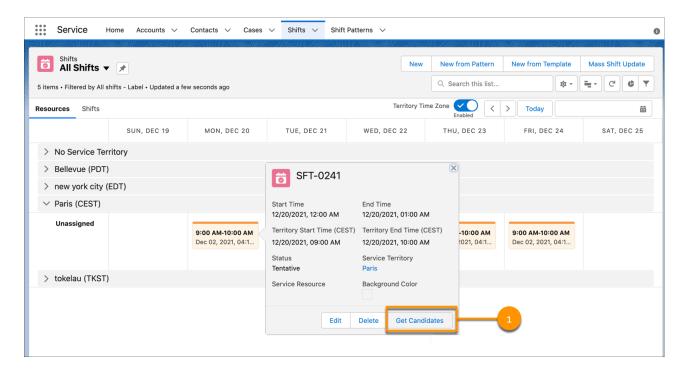
Salesforce Help: Color-Code Shifts (Right-click to view in a new tab or window.) Salesforce Video: Shift Enhancements (English only)

Be a Scheduling Hero and Quickly Find Shift Candidates

Let shift managers easily find and assign a service resource using the Get Candidates action. Shift managers can create a fair and well-balanced shift schedule using objectives and rules that take workers' preferred hours into account. For example, a scheduling rule can limit the number of work hours per day, week, or month. Get Candidates then accounts for worker preferences and other constraints, like limiting nonstandard shifts.

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

How: In the shift calendar, hover over a shift and click **Get Candidates** (1).



SEE ALSO:

Salesforce Help: Find Shift Candidates (Right-click to view in a new tab or window.)

Salesforce Help: Prepare Your Org for Shift Scheduling (Right-click to view in a new tab or window.)

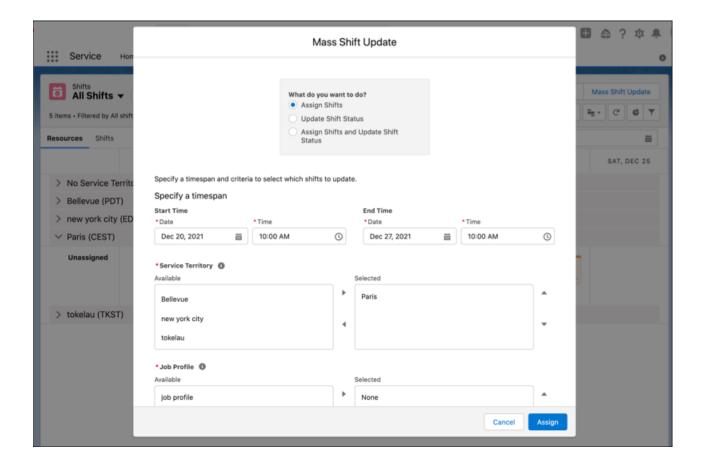
Salesforce Video: Shift Enhancements (English only)

Save Time with Mass Shift Updates

With just a few clicks, your shift managers can update shifts in bulk. They can create a background task that assigns agents, updates shift statuses, or does both on a batch of shifts. When updating shifts in bulk, all scheduling rules, objectives, and resource preferences are taken into account.

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

How: On the Shift tab, click **Mass Shift Update** and select an action. To determine which shifts to update, managers can specify dates, service territories, job profiles, and status settings.



SEE ALSO:

Salesforce Help: Assign and Update Shifts in Bulk (Right-click to view in a new tab or window.)

Salesforce Help: Prepare Your Org for Shift Scheduling (Right-click to view in a new tab or window.)

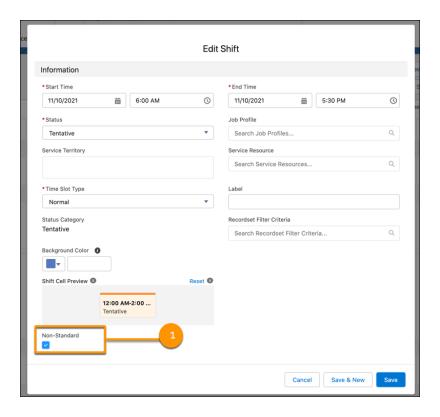
Salesforce Video: Shift Enhancements (English only)

Limit Nonstandard Shifts and Boost Your Team's Work-Life Balance

Help shift managers equitably schedule shifts and improve their team's well-being. See at a glance which shifts are inconvenient or undesirable by marking shifts as nonstandard. A red icon in the shift calendar and dispatcher console shows which shifts are nonstandard. Shift managers can also create scheduling rules and constraints that limit how many nonstandard shifts are assigned to service resources.

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

How: Shift managers mark less desirable shifts as nonstandard (1). Optionally, specify the maximum number of nonstandard shifts per month in a scheduling constraint on service resources or service territories. Then create a scheduling rule to limit nonstandard shifts.



SEE ALSO:

Salesforce Help: Nonstandard Shifts (Right-click to view in a new tab or window.) Salesforce Video: Shift Enhancements (English only)

Tighten Your Service Resources' Security by Hiding Their Location

Fine-tune privacy protection by controlling who can see the whereabouts of mobile workers. Assign permissions to hide live positions and actual routes from the dispatcher console map and resource map. You can also hide the last-seen time indicators from the Gantt.

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

How: From Setup, assign custom permissions to a user's profile. Or, add the custom permissions to permission sets on the Custom Permissions page for specific users.

SEE ALSO:

Salesforce Help: Set Custom Permissions for Field Service (Right-click to view in a new tab or window.)

Salesforce Help: Enable Custom Permissions in Profiles (Right-click to view in a new tab or window.)

Salesforce Help: Enable Custom Permissions in Permission Sets (Right-click to view in a new tab or window.)

Reduce CPU Usage While You're Inactive

Stepped away from the dispatcher console? Reload the page when you return to continue. User idle time is now monitored to reduce unnecessary Gantt refreshes and improve computer performance.

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

Field Service Settings Tab Uses More Inclusive Language

Same only better! As part of our effort to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. The FSL_Master_Settings tab name is now called FSL_Field_Service_Settings. New Salesforce orgs already benefit from this update. Existing orgs must replace the tab.

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

How: Remove the old FSL_Master_Settings tab first, then add the new tab to the Field Service Admin app. If you don't remove the old tab first, you could end up with both tabs.

In Setup, in the Quick Find box, enter Tabs, and then click **Tabs**. Select the unmanaged **Field Service Settings** tab, and click **Edit**. Delete the Tab Name, and save.

To add the FSL__Field_Service_Settings tab, in Setup, in the Quick Find box, enter App Manager, and then click **App Manager**. Edit the Field Service Admin app, and then select the **Field Service Settings** tab from Available Tabs. Click **Add** and save.

SEE ALSO:

Inclusive Terms Are Replacing Legacy Language

Define Resource Preference Based on Location and Assets

Assign a preferred worker to a service appointment where preference is based on location, asset, or account. Now, a resource preference is automatically set for work orders and work order line items based on the resource preference listed in the asset, the location, or the account. Previously, resource preferences were set only on work orders based on their account's preference.

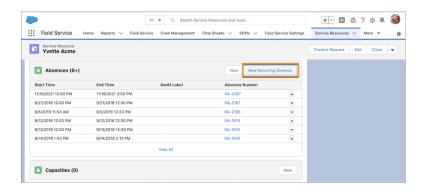
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Create Recurring Absences for Service Resources

Save by time by scheduling a set of routine absences for your mobile worker, such as a meeting or recuring medical appointment. Create absences that recur on a daily, weekly, or monthly schedule. Set an end date for the absence, or set the number of absence occurrences.

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

How: Use the New Recurring Absence button on the Absences related list.



Ensure a Smooth Dispatcher Console Experience When Calling Visualforce Remoting API

Be ready for Visualforce Remoting API. The Visualforce Remoting API uses JavaScript to call methods in Apex controllers directly from Visualforce pages. To ensure that the API is properly secured, we added stricter call validation in Spring '21. As a result of this update, you must enable the FSL.ctrl001_Gantt Apex Class for all Gantt user profiles.

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

How: In Setup, in the Quick Find box, enter *Profiles*, and then click **Profiles**. Click the Gantt user's profile and then click **Apex Class Access**. Click **Edit**, and then select **FSL.ctrl001_Gantt** from the available Apex classes. Click **Add** and save. Repeat this procedure for all Gantt users.

SEE ALSO:

Securely Call the Visualforce Remoting API (Release Update)

Service Appointment Status Updates Are No Longer Unlimited

When your users update service appointment statuses, the number of ServiceAppointmentShare records that can be processed in a single batch is now limited to 50,000 records. If you exceed the limit, you receive an error, and the changes aren't saved. Most customers don't notice an impact.

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

Field Service Asset Management

Use maintenance work rules to schedule preventive maintenance for your assets to avoid downtime.

IN THIS SECTION:

Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria (Generally Available)

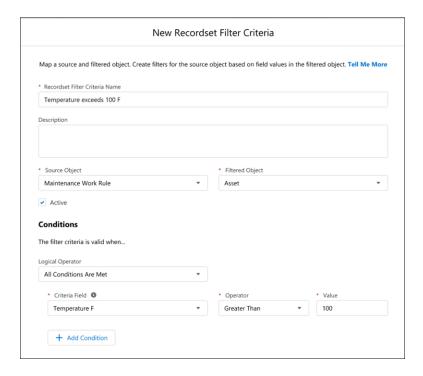
Proactively avoid downtime by creating preventive maintenance plans based on asset use, condition, and recommended maintenance schedules. You can use any criteria to create a plan. For example, you can automatically schedule service for an asset if its temperature exceeds the specified threshold.

Prevent Unscheduled Downtime and Increase Asset Reliability with Filter Criteria (Generally Available)

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.

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.



Field Service Administration and Processes

Ensure that each of your customer's requirements are being met by adding the rules they maintain to the appointments they schedule.

IN THIS SECTION:

Create Account-Specific Work Plans

Now you can associate flows and procedures to account Work Plans. For example, a company has safety and security protocols for its mobile workers. With account-specific work plans, you can attach these requirements to the work order that's assigned to the company's account.

Create Account-Specific Work Plans

Now you can associate flows and procedures to account Work Plans. For example, a company has safety and security protocols for its mobile workers. With account-specific work plans, you can attach these requirements to the work order that's assigned to the company's account.

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

How: Create a work plan template and the related steps for an account. Then create a work plan selection rule and select the account. The new work order is associated with that account and the work plans are attached to the work order.

Field Service Customer Engagement

Use Visual Remote Assistant to engage via video, request a remote support session, and improve your two-way video meeting experience.

IN THIS SECTION:

Deliver Service Anytime, Anywhere with Visual Remote Assistant for Experience Cloud

Engage with communities, customers, and partners via video. Remote visual sessions keep workers, partners, and customers safe, improve efficiency, and reduce costs. Just add the Visual Remote Assistant component to the object record page layout.

Let Customers Request a Remote Visual Support Session

Improve engagement with your customers by allowing them to request a live session with a support agent. A customer can connect with an agent from the support website without losing context or switching to another website or application.

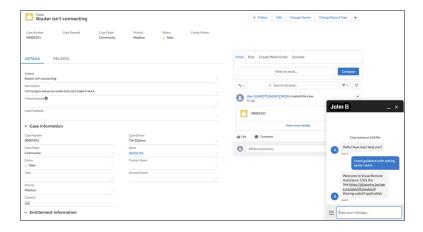
Document Your Sessions with Screenshots

Provide a more intuitive and enhanced user experience by allowing agents to take screenshots to document the session. The new layout and image-snapping capabilities are available automatically when an agent initiates a two-way video session.

Deliver Service Anytime, Anywhere with Visual Remote Assistant for Experience Cloud

Engage with communities, customers, and partners via video. Remote visual sessions keep workers, partners, and customers safe, improve efficiency, and reduce costs. Just add the Visual Remote Assistant component to the object record page layout.

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



SEE ALSO:

Trailhead: Visual Remote Assistant

Let Customers Request a Remote Visual Support Session

Improve engagement with your customers by allowing them to request a live session with a support agent. A customer can connect with an agent from the support website without losing context or switching to another website or application.

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Trailhead: Visual Remote Assistant

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Provide a more intuitive and enhanced user experience by allowing agents to take screenshots to document the session. The new layout and image-snapping capabilities are available automatically when an agent initiates a two-way video session.

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SEE ALSO:

Trailhead: Visual Remote Assistant

Field Service Mobile

Bundled service appointments and automatic status updates ease the busy work, so mobile workers can get more done on the job. Related Records priming also saves time by letting mobile workers choose only the records they need before going offline.

IN THIS SECTION:

Work More Efficiently with Bundled Service Appointments

Organize service appointments to help mobile workers get the job done. Let your mobile workers view and report their progress on bundled service appointments. Mobile workers can also update the status of multiple service appointments at once.

Make Appointment Status Changes Easier (Beta)

Give back-office workers more accurate insight into activity in the field without interrupting mobile workers. Set up the Field Service mobile app to update appointment statuses so that mobile workers can focus on the job. For example, when the mobile worker is on the way to an appointment, the app shows a suggested change of status. The mobile worker can either reject or update the status. If no action is taken, the status changes automatically after a predefined time.

Manage Mobile Settings in Lightning Experience

Field Service mobile settings is now in Lightning Experience! All the features that you rely on are still in place but with an updated UI for an optimal experience.

Stop Deep Link Security Dialogs From Interrupting Your Work (Generally Available)

Hide persistent security warnings when opening deep links to actions.

Get Valuable User Feedback Sent to Your Inbox

Get all the details that you need to troubleshoot issues in Field Service, along with the log emails that are automatically generated when users encounter an issue.

Choose Your Favorite App to Streamline Emails

Use your preferred app to keep track of all your emails in the Field Service mobile app. For example, if you've set a default mail app for your device, you can choose it to send emails from the Field Service mobile app.

Get Right to Work in the Salesforce App from the Actions Launcher

Open the Salesforce app from the Actions launcher to quickly be productive.

Save Time By Priming Only the Records You Need (Beta)

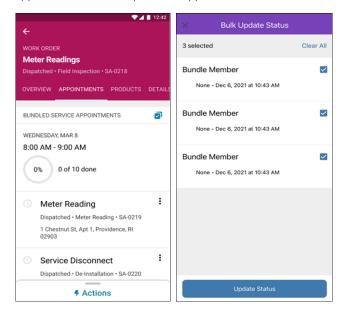
Don't wait for downloads! Use Briefcase Builder to choose which related records to prime so you can get on the job faster. For example, configure Briefcase Builder to prime only the custom object **Price Catalog** related to the asset **Electrical Cables**.

Work More Efficiently with Bundled Service Appointments

Organize service appointments to help mobile workers get the job done. Let your mobile workers view and report their progress on bundled service appointments. Mobile workers can also update the status of multiple service appointments at once.

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

How: Update the service appointment layout and add field permissions for mobile users. On the Field Service mobile app, open the Appointments tab and update the appointment statuses.



SEE ALSO:

Salesforce Help: Mange Bundled Service Appointments on the Field Service Mobile App (Right-click to view in a new tab or window.) Salesforce Video: What is the Service Appointment Bundler?

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Give back-office workers more accurate insight into activity in the field without interrupting mobile workers. Set up the Field Service mobile app to update appointment statuses so that mobile workers can focus on the job. For example, when the mobile worker is on the way to an appointment, the app shows a suggested change of status. The mobile worker can either reject or update the status. If no action is taken, the status changes automatically after a predefined time.

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



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 Field Service Mobile Settings, under Automatic Status Change, select **Semi** mode and configure the settings.



SEE ALSO:

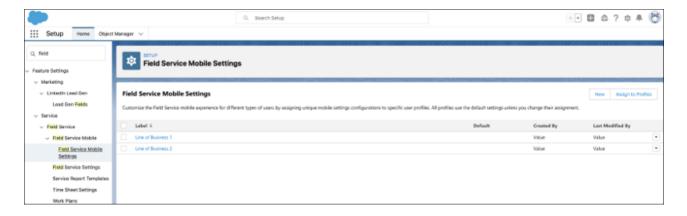
Salesforce Help: Automatic Status Change (Beta) (Right-click to view in a new tab or window.)

Manage Mobile Settings in Lightning Experience

Field Service mobile settings is now in Lightning Experience! All the features that you rely on are still in place but with an updated UI for an optimal experience.

Where: This change applies to Field Service in Enterprise, Performance, Unlimited, and Developer editions.

How: Use the Lightning Experience settings just as you used them in Salesforce Classic. All the functionality is the same, just with an enhanced experience..



SEE ALSO:

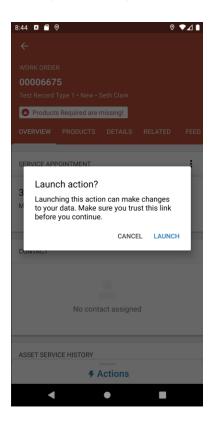
Salesforce Help: Learn More About Field Service Mobile Settings

Stop Deep Link Security Dialogs From Interrupting Your Work (Generally Available)

Hide persistent security warnings when opening deep links to actions.

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

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:

Salesforce Developer: Deep Linking Schema for the Field Service Mobile App

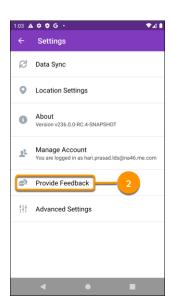
Get Valuable User Feedback Sent to Your Inbox

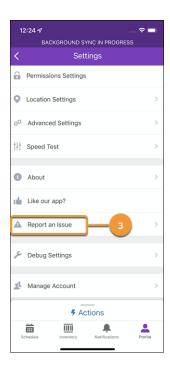
Get all the details that you need to troubleshoot issues in Field Service, along with the log emails that are automatically generated when users encounter an issue.

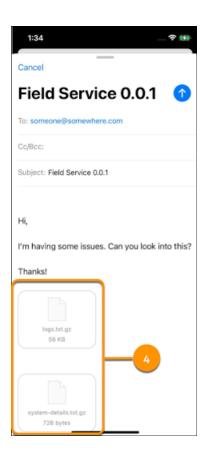
Where: This change applies to Field Service for Android and iOS.

How: In Field Service Settings, add your email address (1) to enable user feedback. When a user taps Provide Feedback in Android (2), or Report an Issue in iOS (3), you get an email with the user's feedback and the logs (4).









SEE ALSO:

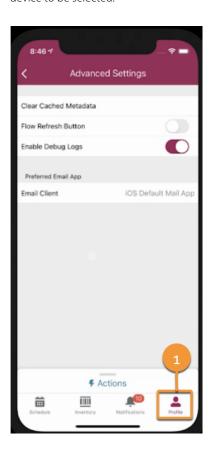
Salesforce Help: Learn More About Field Service Mobile Settings
Salesforce Help: In-App Profile Settings in the Field Service Mobile App
Salesforce Help: In-App Profile Settings in the Field Service Mobile App

Choose Your Favorite App to Streamline Emails

Use your preferred app to keep track of all your emails in the Field Service mobile app. For example, if you've set a default mail app for your device, you can choose it to send emails from the Field Service mobile app.

Where: This change applies to Field Service for iOS.

How: In Advanced Settings, tap **Profile** (1), then tap to select your preferred email app (2). The email app needs to be set up on your device to be selected.



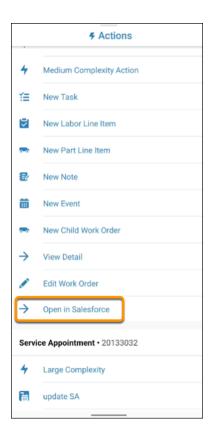


Get Right to Work in the Salesforce App from the Actions Launcher

Open the Salesforce app from the Actions launcher to quickly be productive.

Where: This change applies to Field Service for Android.

How: After you install the Salesforce app, Android adds the Open in Salesforce action to the Actions launcher menu.



Save Time By Priming Only the Records You Need (Beta)

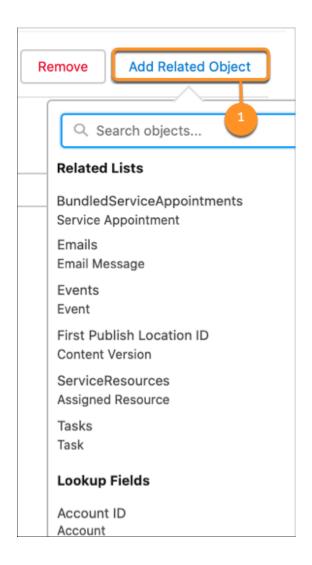
Don't wait for downloads! Use Briefcase Builder to choose which related records to prime so you can get on the job faster. For example, configure Briefcase Builder to prime only the custom object **Price Catalog** related to the asset **Electrical Cables**.

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



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: Click **Add Related Object** to choose from a picklist of **Related Lists** or **Lookup Field**s for that object. After you select a related object, use filter criteria to narrow the record data that you want to be available offline.





SEE ALSO:

Salesforce Video: Related Record Priming

Salesforce Help: Briefcase Builder

Salesforce Help: Offline Priming in the Field Service Mobile App

Field Service REST API

Use the Appointment Bundling REST APIs to manage your bundles.

IN THIS SECTION:

Manage Your Bundles Using APIs

Use the Appointment Bundling REST APIs to create, update, and unbundle your service appointment bundles.

Manage Your Bundles Using APIs

Use the Appointment Bundling REST APIs to create, update, and unbundle your service appointment bundles.

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

SEE ALSO:

Bundle Your Service Appointments to Simplify Scheduling (Right-click to view in a new tab or window.) Salesforce Developer: Field Service REST API (Right-click to view in a new tab or window.)

Hyperforce

Hyperforce is a new infrastructure architecture that unifies the foundations of the various clouds and allows Salesforce to scale rapidly and securely using public cloud partners. Leveraging the public cloud allows Salesforce to expand quickly to new regions that address your local data storage requirements. Hyperforce fosters innovative growth by using common tools, deployment patterns, security practices, and more.

IN THIS SECTION:

Access Salesforce in More Regions with Hyperforce

With Hyperforce you can deploy Salesforce apps and services in a growing number of worldwide regions by using the scale and agility of the public cloud. Hyperforce is already available in many regions so that you can benefit from the power of the public cloud.

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Where: Delivery via Hyperforce of the Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is available in Australia, Canada, France, Germany, India, Japan, and Singapore. Additionally, these products are available on Hyperforce where noted.

Cloud	Product or Feature	Description	Available In
Marketing	CDP	Salesforce CDP can help keep you centered with a single source of truth, providing more intelligent, actionable, and trusted data.	Germany, United States
Industries	Einstein Relationship Insights	Supercharge sales with intelligent relationship discovery. Automate account and contact research, visualize relationship networks, and connect with key decision-makers faster.	United States
Analytics	Tableau CRM	Tableau CRM, previously called Einstein Analytics, is a cloud-based platform for connecting data from multiple sources, creating interactive analytics on that data, and sharing those views in apps. Tableau CRM is a better way to distribute insight to business users so that they can understand and act on changing information.	Australia, Brazil, Canada, France, Germany, India, Japan, Singapore

Industries

Industries solutions have even more goodies for specific business verticals, so you don't have to customize Salesforce yourself. Net Zero Cloud (formerly Sustainability Cloud) gives you new ways to measure and act on your organization's carbon footprint. Financial Services Cloud improves deal tracking and record searches, and adds a Branch Management app. Health Cloud offers identity verification to protect sensitive information. Manufacturing Cloud improves forecasting and SKU management. The Business Rules Engine brings Decision Explainer to help you provide clear reasons for application approvals, rejections, and benefit calculations. We've also made advances in the data processing engine, flows, branch management, rebate management, action plans, and loyalty management, all of which are available for multiple Salesforce clouds.

IN THIS SECTION:

Net Zero Cloud

Spring '22 brings a fresh start for Sustainability Cloud with a brand new name—Net Zero Cloud—and a new location, as it's now a core Salesforce app. Net Zero Cloud calculates greenhouse gas emissions by using global emission factors, so you can gain accurate, critical insights about your carbon footprint. Net Zero Cloud helps you to collect, categorize, and analyze energy usage and greenhouse gas emissions data throughout your organization's business activities.

Financial Services Cloud

Give your users insights into financial deal parties and account interactions. Track and view more data about financial deals. Alert users to changes in client records with Record Alerts. Add custom Interest Tags to records to capture client needs, interests, and opportunities. Give users edit access to residential loan applications. Customize the Group Members and Details component with direct access to your household management flow.

Health Cloud

Health Cloud has expanded its support for your patients' safety and privacy. Now you can protect sensitive information by verifying the identity of callers, and RxNorm is available to help with prescription safety, along with an improved Patient Medication Manager Lightning component. Use Intelligent Sales to get ahead of inventory problems with enhanced support for cycle counts. Provider Network Management now supports contracting for payers and providers. And get ready to switch to the Lead object for bringing in patients now that Candidate Patient is going away.

Loyalty Management

Now your loyalty program managers can set up processes for loyalty programs by using Promotion Setup. Decouple your points expiration process from Loyalty Ledger records and create space for new ledgers. Use Interaction Studio to provide targeted promotions to members in real time. Run a loyalty program on a B2C Commerce site. Sign up for a trial org for Loyalty Management. Personalize the Loyalty Ledger page layout for your users and secure your members' data effectively.

Manufacturing Cloud

Display meaningful account forecasts with exactly the information your users need with measure groups in Advanced Account Forecasting. Manage your forecasts efficiently using the options to create custom fiscal years and generate weekly forecasts for your accounts. Collaborate with your partners on forecasts with the enhanced Manufacturing Cloud template in Experience Cloud. Generate weekly forecasts and more with the Data Processing Engine template enhancements.

Consumer Goods Cloud

Use sales orgs to handle multiple markets more easily and org units to manage hierarchical territories and business areas. Now, sales reps can use the Consumer Goods Cloud offline mobile app to plan their day better, schedule visits, place orders, and calculate accurate order prices (pilot) even when they're offline. Sales reps can use folders and quick access cards to easily access the information that they require to do their jobs better.

Public Sector Solutions

Automate decisions and calculations by using the Business Rules Engine. Provide clear reasons for application approvals, rejections, and benefit calculations with Decision Explainer. And store your applications' actions efficiently by using new Public Sector tooling API objects.

Industries: Common Components

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, Data Processing Engine gives you more detailed definitions and more calculating power. Action plans get more flexibility and control. You can delete unneeded Batch Management job runs, and invoke more decision tables. Einstein Relationship Insights adds relationship recommendations and Gmail support, while Intelligent Form Reader adds support for special characters. Rebate Management offers more summary information and streamlined claims.

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IN THIS SECTION:

Hello Net Zero Cloud

To better reflect our drive to carbon neutrality, Sustainability Cloud is now called Net Zero Cloud. Net Zero Cloud is now also a Salesforce app built on the Salesforce Lightning Platform, giving you tools that boost collaboration, project management, and reporting. To reflect the renaming, we updated the terminology and documentation too.

Manage Your Waste Footprint

Create and track your generated waste based on the waste type and disposal type. Load the waste disposal emissions factors to calculate waste-related emissions. Calculate carbon emissions from waste generated either as part of operations or during the end-of-life treatment of sold products.

Set Science-Based Targets

Set science-based emissions reduction targets to understand how much and how quickly to reduce your greenhouse gas (GHG) emissions to help prevent the worst effects of climate change. Ensure that your science-based targets match the latest climate science requirements and are inline with the Paris Agreement goals, and that your commitments are approved by your stakeholders.

Forecast Carbon Emissions

Generate forecasts for your greenhouse gas emissions based on emissions activities that can result in emissions. Determine your emissions inventory by emissions activity. Use the inventory to forecast emissions by emissions activity.

Manage Supplier Sustainability Data

Organize sustainability data collection from your suppliers. Track your suppliers' reporting maturity, reported emissions, and science-based targets. Collaborate with third-party organizations to track their annual sustainability scorecard.

Achieve Carbon Neutrality with Net Zero Analytics

Analyze your scope 1, scope 2, and scope 3 emissions data, and take measures to reduce your carbon footprint. Use the Net Zero Analytics dashboards to gain insights into the emissions that your organization's travel, procurement, vehicles, and stationary assets cause. These data-driven insights help you devise an action plan to achieve net zero emissions. Use the Audit dashboard to get an overview of your emissions, verify the accuracy of the emissions data, and ensure that the measures that your organization implements are effective. Use the Climate Action dashboard to get insights into your organization's carbon emissions data, which helps you to devise a climate action plan to reduce your emissions. Use the Business Travel Impact dashboard to learn how your business travel contributes to your organization's overall emissions, and take effective measures to make your travel sustainable. Use the Scope 3 Procurement dashboard to provide actionable insights into your organization's procurement data. Use the Waste Management dashboard to provide insights into the carbon emissions caused by your organization's waste.

New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

New Connect REST APIs

Get to know the available Connect REST APIs for Net Zero Cloud.

Hello Net Zero Cloud

To better reflect our drive to carbon neutrality, Sustainability Cloud is now called Net Zero Cloud. Net Zero Cloud is now also a Salesforce app built on the Salesforce Lightning Platform, giving you tools that boost collaboration, project management, and reporting. To reflect the renaming, we updated the terminology and documentation too.

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

When: Make your purchase decisions only on the basis of generally available products and features.

Who: Only users with a Net Zero User License can use Net Zero features.

How: Migrate data to the core app by importing or inserting records into the target objects. To maintain record relationships while migrating data to the core app, you must import the object data in a specific sequence. For information on migrating your existing data to the Salesforce app, contact your Salesforce account executive.

SEE ALSO:

Salesforce Help: Report and Reduce Your Carbon Footprint with Net Zero Cloud (Right-click to view in a new tab or window.)

Salesforce Help: Set Up and Maintain Net Zero Cloud (Right-click to view in a new tab or window.)

Net Zero Cloud Developer Guide: Net Zero Cloud Standard Objects (Right-click to view in a new tab or window.)

Manage Your Waste Footprint

Create and track your generated waste based on the waste type and disposal type. Load the waste disposal emissions factors to calculate waste-related emissions. Calculate carbon emissions from waste generated either as part of operations or during the end-of-life treatment of sold products.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: Only users with a Waste Management user permission can load waste disposal emissions factors for emissions calculation, track waste-related data, and calculate emissions related to waste.

How: To track waste-related data and calculate related emissions and footprint in your org, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage Waste-Related Data**.

SEE ALSO:

Salesforce Help: What Are Waste-Related Emissions? (Right-click to view in a new tab or window.)

Set Science-Based Targets

Set science-based emissions reduction targets to understand how much and how quickly to reduce your greenhouse gas (GHG) emissions to help prevent the worst effects of climate change. Ensure that your science-based targets match the latest climate science requirements and are inline with the Paris Agreement goals, and that your commitments are approved by your stakeholders.

Create scope-wise emissions reduction targets or Net Zero targets at the company level. You can also create other targets, such as renewable energy, to increase the percentage of renewable energy used or supplier engagement targets to increase the percentage of suppliers you aim to engage with to set their science-based targets.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: Only users with a Target Setting user permission can set emissions reduction or other targets based on the emissions activity and year.

Why: Use your stakeholder-approved commitments to fill out the Science Based Targets initiative's (SBTi's) Business Ambition for 1.5°C commitment letter to commit to the highest levels of climate ambition possible. When SBTi approves your commitment, upload the commitment documents in Net Zero Cloud. Calculate or enter your organization's emissions inventory for a particular year and use this information as base emissions to set your targets to achieve your commitment. After your emissions baseline is created, set science-based or non-science based targets that represent your organization's emissions reduction goals and then track your commitment in Net Zero Cloud.

You also can set other targets, such as an increase in renewable energy usage or an increase in the percentage of suppliers to engage for science-based targets. The emissions activity can be scope 1, scope 2, or scope 3 business travel.

How: To set targets for reducing emissions based on the emissions activity and year in the org, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage Emissions Target**.

SEE ALSO:

Salesforce Help: Set Emissions Targets (Right-click to view in a new tab or window.)

Forecast Carbon Emissions

Generate forecasts for your greenhouse gas emissions based on emissions activities that can result in emissions. Determine your emissions inventory by emissions activity. Use the inventory to forecast emissions by emissions activity.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: Emissions forecasting is based on the Advanced Account Forecasting capability in Manufacturing Cloud. Users must enable the Advanced Account Forecasting permissions set to enable this functionality. They don't need a Manufacturing Cloud license.

Why: An emissions activity is an emission generating activity and its greenhouse gas category that is used to aggregate emissions. An emissions activity is associated with a business metric that acts as a factor for its forecast. For example, revenue is a factor used to calculate business travel related emissions forecasts. Forecasting of emissions for an emissions activity is based on calculating the activity's emissions intensity for a previous year by using the available emissions data. The intensity is calculated by dividing the emissions for the year by the value of an underlying business metric, such as, revenue, headcount, total floor area, or procurement spend. This intensity is used to forecast emissions in future years by multiplying the intensity with the value of the business metric for that future year. You can make intensity adjustments or specify absolute reductions in emissions based on plans to adjust the calculated forecast. Forecasts for individual emissions activities are aggregated to the scope they belong to, and eventually to the overall emissions of the organization.

How: To forecast emissions for future years based on advanced account forecasting in the org, from Setup, in the Quick Find box, enter Net Zero, and then select **Net Zero Settings**. Turn on **Manage Carbon Emissions Forecast**. Assign the Advanced Account Forecasting permission set to your users to enable them to track emissions forecasts for measures across multiple dimensions. In addition, assign the Data Pipelines Base User permission set to admins to allow them to copy and use the Data Processing Engine definitions.

SEE ALSO:

Salesforce Help: Generate Emissions Forecasts (Right-click to view in a new tab or window.)

Manage Supplier Sustainability Data

Organize sustainability data collection from your suppliers. Track your suppliers' reporting maturity, reported emissions, and science-based targets. Collaborate with third-party organizations to track their annual sustainability scorecard.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: For internal users, such as the Net Zero Cloud Manager, use the External Engagement Management User permission to view the sustainability scorecards. For partner community users, such as suppliers, use the External Engagement Experience Cloud User permission through user profiles or permission sets.

Why: To build a more accurate scope 3 carbon footprint, you're required to collect emissions information from your suppliers. The collected emissions data augments the calculations from the spend-based method that is used in Scope 3 Hub. The partner community users can use Experience Cloud and the Experience Cloud site that you create to upload their sustainability scorecard information. Net Zero Cloud Managers can then select their preferred emissions calculation methodology for procurement items.

How: To collaborate with suppliers and track their sustainability data in the org, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage Supplier Sustainability Data**.

SEE ALSO:

Salesforce Help: Engage Suppliers for Emissions Reduction (Right-click to view in a new tab or window.)

Achieve Carbon Neutrality with Net Zero Analytics

Analyze your scope 1, scope 2, and scope 3 emissions data, and take measures to reduce your carbon footprint. Use the Net Zero Analytics dashboards to gain insights into the emissions that your organization's travel, procurement, vehicles, and stationary assets cause. These data-driven insights help you devise an action plan to achieve net zero emissions. Use the Audit dashboard to get an overview of your emissions, verify the accuracy of the emissions data, and ensure that the measures that your organization implements are effective. Use the Climate Action dashboard to get insights into your organization's carbon emissions data, which helps you to devise a climate action plan to reduce your emissions. Use the Business Travel Impact dashboard to learn how your business travel contributes to your organization's overall emissions, and take effective measures to make your travel sustainable. Use the Scope 3 Procurement dashboard to provide actionable insights into your organization's procurement data. Use the Waste Management dashboard to provide insights into the carbon emissions caused by your organization's waste.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

Who: To create an app from the Net Zero Analytics template, you need the TCRM for Net Zero Analytics add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App | Net Zero Analytics**. Follow the setup instructions to create your app.

SEE ALSO:

Salesforce Help: Use the Net Zero Analytics App (Right-click to view in a new tab or window.)

New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

Here are the new data objects in the core app to use instead of the existing data objects in the managed package.

Set up stationary assets

Use the new StnryAssetEnvrSrc object instead of the sustain_app__Asset__c object.

Set up mobile assets

Use the new VehicleAssetEmssnSrc object instead of the sustain_app__Asset__c object.

Set up scope 3 activities

Use the new Scope3EmssnSrc object instead of the sustain_app__Asset__c object.

Manage average energy intensity by fuel type across buildings

Use the new BldgEnrgyIntensity object instead of the sustain_app__BuildingEnergyIntensity__c object.

Manage calculated average energy intensity for an individual fuel type across buildings

Use the new BldgEnrgyIntensityVal object instead of the sustain_app__BuildingEnergyIntensity__c object.

Manage building size filter criteria for the building energy intensity records

Use the new BldgSizeCategory object instead of the sustain_app__BuildingSizeCategory__c object.

Calculate total carbon emissions and other environmental attributes from stationary assets

Use the new StnryAssetCrbnFtprnt object instead of the sustain app ConsumptionReport c object.

Calculate total emissions of individual fuel types

Use the new StnryAssetCrbnFtprntltm object instead of the sustain_app__ConsumptionReport__c object.

Calculate total carbon emissions from vehicles

Use the new VehicleAssetCrbnFtprnt object instead of the sustain_app__ConsumptionReport__c object.

Calculate total carbon emissions from scope 3 activities

Use the new Scope3CrbnFtprnt object instead of the sustain_app__ConsumptionReport__c object.

Set up sources of electricity by fuel type (grid mixes)

Use the new ElectricityEmssnFctrSet object instead of the sustain_app__EmissionFactorElectricity__c object.

Set up conversion factors for various data types and sources

Use the new OtherEmssnFctrSet object instead of the sustain_app__EmissionFactorOther__c object.

Set up individual entries for emissions and conversion factors for various data types and sources

Use the new OtherEmssnFctrSetItem object instead of the sustain_app__EmissionFactorOther__c object.

Set up global warming potential values for individual refrigerants

Use the new RefrigerantEmssnFctr object instead of the sustain_app__EmissionFactorOther__c object.

Set up emissions factors to convert spent amounts in procurement data to carbon emissions

Use the new PcmtEmssnFctrSet object instead of the sustain_app__EmissionFactorScope3__c object.

Set up individual emissions factors for scope 3 procurement analysis

Use the new PcmtEmssnFctrSetItem object instead of the sustain_app__EmissionFactorScope3__c object.

Set up emissions factors for scope 3 commercial air travel

Use the new AirTravelEmssnFctr object instead of the sustain_app__EmissionFactorScope3__c object.

Set up emissions factors for scope 3 ground travel

Use the new GroundTravelEmssnFctr object instead of the sustain_app__EmissionFactorScope3__c object.

Set up emissions factors for scope 3 hotel stay

Use the new HotelStayEmssnFctr object instead of the sustain_app__EmissionFactorScope3__c object.

Set up emissions factors for scope 3 freight hauling

Use the new FrgtHaulingEmssnFctr object instead of the sustain_app__EmissionFactorScope3__c object.

Set up emissions factors for scope 3 rental car usage

Use the new RentalCarEmssnFctr object instead of the sustain_app__EmissionFactorScope3__c object.

Manage energy consumption related to stationary assets across multiple fuel types

Use the new StnryAssetEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage fuel consumption from vehicles

Use the new VehicleAssetEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage energy consumption from freight hauling

Use the new FrgtHaulingEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage energy consumption from rental cars

Use the new RentalCarEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage energy consumption from air travel

Use the new AirTravelEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage energy consumption from hotel stay

Use the new HotelStayEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage energy consumption from ground travel

Use the new GroundTravelEnrgyUse object instead of the sustain_app__EnergyConsumption__c object.

Manage inflation rates to adjust currency values from one year to another

Use the new InflationRate object instead of the sustain_app__InflationRate__c object.

Manage procurement (corporate spending) entry records

Use the new Scope3Pcmtltem object instead of the sustain_app__ProcurementEntry__c object.

Manage organization spends for an individual procurement category

Use the new Scope3PcmtSummary object instead of the sustain_app__ProcurementDataset__c object.

New Objects

Here are the new data objects in the core app.

Manage allocation of fuel consumption for different scope emissions

Use the new CrbnEmssnScopeAlloc object.

Manage scope allocation by fuel type

Use the new CrbnEmssnScopeAllocVal object.

Manage emissions factors for scope 3 waste handling

Use the new WstDispoEmssnFctrSet object.

Set up individual emissions factors for scope 3 waste handling

Use the new WstDispoEmssnFctrSetItm object.

Calculate aggregated waste and carbon emissions from waste

Use the new WasteFootprint object.

Calculate waste type and disposal type of aggregated waste

Use the new WasteFootprintItem object.

Manage waste generated in operations

Use the new GeneratedWaste object.

Set up company's commitment to reducing its carbon emissions

Use the new EmssnRdctnCommitment object.

Manage company's total carbon emissions for a particular year

Use the new AnnualEmssnInventory object.

Set up science-based or non-science-based target to fulfill company's emissions reduction commitment

Use the new EmssnReductionTarget object.

Set up emissions reduction targets trajectory for your company with targets from base year to target year

Use the new AnnualEmssnRdctnTarget object.

Set up time periods, measures, and dimensions that are used to forecast emissions of a company

Use the new EmissionsForecastFact object.

Manage company's emission generating activities and greenhouse gas categories

Use the new EmissionsActivity object.

Manage annual sustainability scorecard of third-party orgs

Use the new SustainabilityScorecard object.

Manage supplier for a climate-committed company

Use the new Supplier object.

Set up mapping between the Building Energy Intensity record type and picklists

Use the new BldgEnrgyIntensityCnfg object.

Set up mapping between the Stationary Asset Environmental Source record type and picklists

Use the new StnryAssetEnvrSrcConfig object.

Set up mapping between the Vehicle Asset Emissions Source record type and picklists

Use the new VehicleAssetEmssnSrcCnfg object.

SEE ALSO:

Net Zero Cloud Developer Guide: Net Zero Cloud Standard Objects (Right-click to view in a new tab or window.)

New Connect REST APIs

Get to know the available Connect REST APIs for Net Zero Cloud.

Net Zero Cloud

Capture the carbon footprint for your organization by creating an annual emissions inventory

Make a POST request to the new /connect/sustainability/carbon-inventory resource.

New request body: Sustainability Carbon Inventory Input

New response body: Sustainability Carbon Inventory

Lock a Salesforce object record to prevent data modification after footprint is calculated

Make a PUT request to the /connect/sustainability/record-locking/lock/\${recordId} resource.

New response body: Record Lock Unlock Output

Unlock a Salesforce object record to update data

Make a PUT request to the /connect/sustainability/record-locking/unlock/\${recordId} resource.

New response body: Record Lock Unlock Output

Recalculate a Salesforce object record after updating data

 $\label{lem:makeaPUT} Make a PUT request to the /connect/sustainability/footprint-calculation/recalculate/\$ \{ \textit{recordId} \} \\ resource.$

New response body: Carbon Footprint Recalculation Output

Financial Services Cloud

Give your users insights into financial deal parties and account interactions. Track and view more data about financial deals. Alert users to changes in client records with Record Alerts. Add custom Interest Tags to records to capture client needs, interests, and opportunities. Give users edit access to residential loan applications. Customize the Group Members and Details component with direct access to your household management flow.

IN THIS SECTION:

Financial Deal Management

Track more details about the bids and assets that are part of a financial deal. See at a glance who's involved in a deal with the new Financial Deal Parties component.

Interaction Summaries

Give your users insights into accounts and key contacts. Extend the interaction summaries component for any object including custom objects. Use the duplicate record management feature to prevent the creation of duplicate interaction records.

Record Alerts

Keep clients informed about changes to their records with Record Alerts.

Interest Tags

With Interest Tags, your users can now easily track clients' business and personal interests by apply custom tags to client records.

Residential Loan Applications

Loan officers and other account team members with read-only access to the Account object can now edit Residential Loan Applications.

Group Members and Details Component

Give users easy access to your household management flow by customizing the Group Members and Details component.

Branch Association

Use Record Association Builder instead of retired Branch Association (beta) preference.

Insurance for Financial Services Cloud

The enhanced Insurance Claims and Policy Analytics app gives you actionable insights for managing claims and policies.

New and Changed Objects in Financial Services Cloud

Do more with new and updated Financial Services Cloud objects.

REST API

Financial Services Cloud REST API includes enhanced calls.

Apex: New Items

These methods and classes are new.

Financial Deal Management

Track more details about the bids and assets that are part of a financial deal. See at a glance who's involved in a deal with the new Financial Deal Parties component.

IN THIS SECTION:

Record More Data About Financial Deals

With the enhanced financial deal data model, your users can track the bids and assets that are part of a financial deal. For financial deal bids, track details such as bid date, bid amount, and bid round. For financial deal assets, track details such as asset type and unit of measure.

Show Details About Financial Deal Parties

The new Financial Deal Parties component lets your users quickly identify the accounts or contacts that are involved parties in a financial deal, the roles of the parties, and more. See which contacts are involved from the account, which users they've interacted with, and interaction details.

Record More Data About Financial Deals

With the enhanced financial deal data model, your users can track the bids and assets that are part of a financial deal. For financial deal bids, track details such as bid date, bid amount, and bid round. For financial deal assets, track details such as asset type and unit of measure.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Add the related lists for Financial Deal Bids and Financial Deal Assets to the Financial Deal record page layout.

Show Details About Financial Deal Parties

The new Financial Deal Parties component lets your users quickly identify the accounts or contacts that are involved parties in a financial deal, the roles of the parties, and more. See which contacts are involved from the account, which users they've interacted with, and interaction details.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Add the Financial Deal Parties component to the page layout of a Financial Deal record. Your users can expand an account to see which contacts are involved.

View the users who interacted with a contact by clicking ... View details about an interaction of ... view details about an interaction of ... view details about an interaction of ... view details about a supplier of ... view details ab



Interaction Summaries

Give your users insights into accounts and key contacts. Extend the interaction summaries component for any object including custom objects. Use the duplicate record management feature to prevent the creation of duplicate interaction records.

IN THIS SECTION:

Give Your Users Insights into Accounts and Key Contacts

The new Account Interactions component lets your users quickly identify the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Interaction Summaries Are Available for More Objects

You can now add the Interaction Summaries component to any object record page including custom objects. Previously, it was supported only for the Account, Financial Deal, and Opportunity objects.

Prevent Duplicate Interaction Records

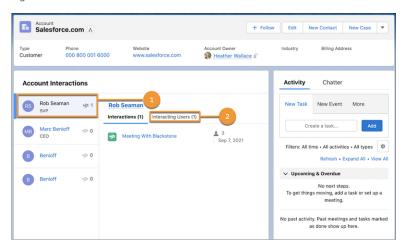
You can now use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

Give Your Users Insights into Accounts and Key Contacts

The new Account Interactions component lets your users quickly identify the key contacts for an account, past account interactions, and details such as the users who have interacted with each contact and the total number of interactions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Financial Services Cloud is enabled.

How: Add the Account Interaction component to the page layout of an Account record, so that it shows the list of contacts in the main region.



When users select a contact (1), the component shows details about interactions with that contact, such as when an interaction occurred and how many attendees were involved. See information on the users interacting with this contact on the Interacting Users tab (2).

By default, users' access privileges control what data is shown in the component. You can override this default setting so that the component shows everyone the total number of interactions and all interacting users. Edit the Account record page, select the **Account Interactions** component, and then in the Properties pane, select **View data as an admin**.



Note: Before you can enable this setting, the View Account Interaction as Admin feature setting must be enabled for Interaction Summaries.

SEE ALSO:

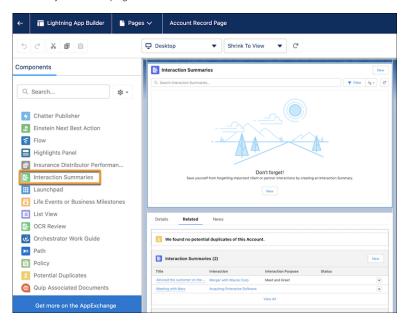
Salesforce Help: View Account Interactions and Key Contacts

Interaction Summaries Are Available for More Objects

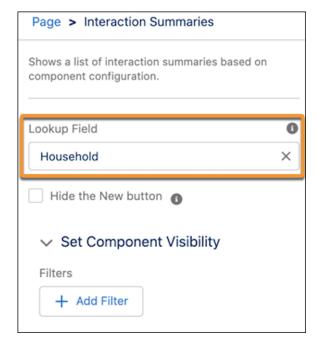
You can now add the Interaction Summaries component to any object record page including custom objects. Previously, it was supported only for the Account, Financial Deal, and Opportunity objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: First, create a lookup from the Interaction Summary object to the required object. Then add the Interaction Summaries component to the object record page.



With the component selected in Lightning App Builder, in the Properties pane, select a Lookup Field value. Remember that the values in the dropdown menu depend on the record page that you're editing.



Prevent Duplicate Interaction Records

You can now use the duplicate record management feature with the Interaction object. Help your users keep their Interaction records free of duplicates by creating duplicate rules and matching rules for the Interaction object.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

Salesforce Help: Customize Duplicate Management

Record Alerts

Keep clients informed about changes to their records with Record Alerts.

IN THIS SECTION:

Keep Clients Informed of Potential Issues with Record Alerts

Alert agents when changes in client records require action. Using Record Alerts, agents can scan a record and see notifications that show information from your core banking system or from alerts that are stored in Salesforce. Take advantage of other features too, such as snoozing alerts for later and dismissing alerts. Using APIs, aggregate financial account transactions, financial accounts, and person account alerts in a hierarchical view.

Keep Clients Informed of Potential Issues with Record Alerts

Alert agents when changes in client records require action. Using Record Alerts, agents can scan a record and see notifications that show information from your core banking system or from alerts that are stored in Salesforce. Take advantage of other features too, such as snoozing alerts for later and dismissing alerts. Using APIs, aggregate financial account transactions, financial accounts, and person account alerts in a hierarchical view.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the Financial Services Cloud Foundations or Financial Services Cloud Extension permission set and OmniStudio User and OmniStudio Admin permission sets to use this feature.

Why: Show alerts relevant to relationship managers or contact center agents in the context of a client interaction. For example, if an agent sees a low balance alert on the financial account that funds direct withdrawals, the agent can notify the client to transfer funds and avoid overdrafts.



How: In Lightning App Builder, add the AlertCard component to your record pages. Or, use OmniStudio FlexCards to build custom components that show record alert information with clickable actions that change based on the information they contain. Then, give your users access to the Record Alerts tab and object. Customize severity values for record alerts and alert categories.

SEE ALSO:

Salesforce Help: Record Alerts (Right-click to view in a new tab or window.)

Vlocity Help: OmniStudio

Vlocity Help: OmniStudio FlexCards

Vlocity Help: Add a FlexCard to a Lightning Page

Interest Tags

With Interest Tags, your users can now easily track clients' business and personal interests by apply custom tags to client records.

IN THIS SECTION:

Personalize Client Interactions by Using Interest Tags

Use Interest Tags to help your users have personalized conversations with their clients and develop deeper relationships. Create custom interest tags and tag categories and then let your users add interest tags to their client records when they identify client interests, needs, and opportunities. Apply them to person accounts for hobbies, such as golf or skiing. Apply them to large business clients for investment interests, such as healthcare or Environmental, Social, and Governance (ESG) investing.

Personalize Client Interactions by Using Interest Tags

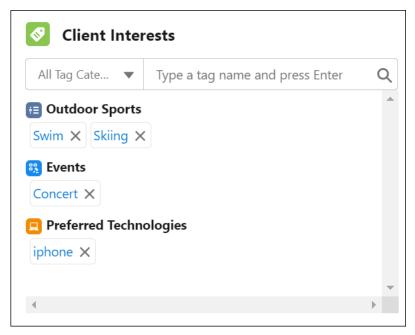
Use Interest Tags to help your users have personalized conversations with their clients and develop deeper relationships. Create custom interest tags and tag categories and then let your users add interest tags to their client records when they identify client interests, needs, and opportunities. Apply them to person accounts for hobbies, such as golf or skiing. Apply them to large business clients for investment interests, such as healthcare or Environmental, Social, and Governance (ESG) investing.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the Financial Services Cloud Extension permission set to use this feature.

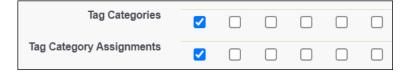
Why: Use tag categories to structure interest tags by creating up to three levels of tag categories. For example, create a tag category called Investment Areas, and then add interest tags called Technology, Commodities, and Life Sciences. During client interactions, your users can add Investment Areas interest tags to a person account, based on the individual's investing preferences.

You can also create custom reports and dashboards to show commonalities and opportunities among clients.



How: In Setup, turn on Topics for objects that you want to add Interest Tags to. Then, select the objects that you want to show the Interest Tag component on. Assign interest tag user permissions by enabling the required Topics permissions on profiles.

Enable Interest Tags. Add the Financial Services Cloud Extension permission set to your user profiles. Then use the same Topics object settings for the Interest Tags, Tag Category Assignments, and Tag Categories objects.



SEE ALSO:

Salesforce Help: Interest Tags(Right-click to view in a new tab or window.)
Salesforce Help: Topics for Objects (Right-click to view in a new tab or window.)

Residential Loan Applications

Loan officers and other account team members with read-only access to the Account object can now edit Residential Loan Applications.

IN THIS SECTION:

Give Read-Only Users Edit Access to Residential Loan Applications

Give loan officers and other account team members permission to edit residential loan applications when they have read-only access to the Account object.

Give Read-Only Users Edit Access to Residential Loan Applications

Give loan officers and other account team members permission to edit residential loan applications when they have read-only access to the Account object.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: User access to residential loan applications is tied to their access to the Account object. Some banks and lenders allow only relationship managers to edit accounts, but want loan officers or others working on residential loan applications to edit applications.

For example, if a user is part of an account team and has read-only access to Accounts, you can now give account team members the edit access they need to applications.

How: From Setup, click **Mortgage Settings** and turn on this feature.

SEE ALSO:

Salesforce Help: Enable Mortgage for Financial Services Cloud (Right-click to view in a new tab or window.)

Group Members and Details Component

Give users easy access to your household management flow by customizing the Group Members and Details component.

IN THIS SECTION:

Customize Group Members and Details Component

You can now give users easy access to your household management flow by linking to your flow from the edit button on the Group Members and Details component. During configuration, you can also prevent inadvertent navigation to the default flow by hiding the record actions menu in group member cards.

Customize Group Members and Details Component

You can now give users easy access to your household management flow by linking to your flow from the edit button on the Group Members and Details component. During configuration, you can also prevent inadvertent navigation to the default flow by hiding the record actions menu in group member cards.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Create a custom action for the button that replaces the default edit button, and then configure the button in the Group Member Setting, a custom metadata type.

SEE ALSO:

Salesforce Help: Set Up Group Member (Configurable) Component (Right-click to view in a new tab or window.)

Branch Association

Use Record Association Builder instead of retired Branch Association (beta) preference.

IN THIS SECTION:

Branch Association (Beta) Preference Has Been Retired

Record Association Builder offers the same record-linking capability as the retired Branch Association (beta) preference. It offers expanded capabilities, such as the flexibility to use custom objects and customized association logic.

Branch Association (Beta) Preference Has Been Retired

Record Association Builder offers the same record-linking capability as the retired Branch Association (beta) preference. It offers expanded capabilities, such as the flexibility to use custom objects and customized association logic.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

Salesforce Help: Record Association Builder (Right-click to view in a new tab or window.)

Insurance for Financial Services Cloud

The enhanced Insurance Claims and Policy Analytics app gives you actionable insights for managing claims and policies.

IN THIS SECTION:

Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics

With the Insurance Claims and Policy Analytics app, get actionable insights that help you effectively manage claims and policies, ensure customer satisfaction, and grow your business. Analyze your team's current and historical performance to better manage workloads and improve team performance. Track product performance based on key metrics for policies, quotes, and commissions. Gain insights into claims performance and financial performance to effectively manage expenses and reserves, and write policies that help boost your revenue.

Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics

With the Insurance Claims and Policy Analytics app, get actionable insights that help you effectively manage claims and policies, ensure customer satisfaction, and grow your business. Analyze your team's current and historical performance to better manage workloads and improve team performance. Track product performance based on key metrics for policies, quotes, and commissions. Gain insights into claims performance and financial performance to effectively manage expenses and reserves, and write policies that help boost your revenue.

Where: This change applies to Tableau CRM in Lightning Experience in Enterprise, Unlimited, and Performance editions where Financial Services Cloud is enabled.

Who: To create an app from the Insurance Claims and Policy Analytics template, 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 setup instructions to create your app.

New and Changed Objects in Financial Services Cloud

Do more with new and updated Financial Services Cloud objects.

Get an expanded view of hierarchical client relationships.

The AccountAccountRelation object now supports Association Type, a list of values that show the relationship of accounts in the Relationship Map.

Financial Deal Management

Capture information about financial deal bids.

Use the new FinancialDealBid object.

Capture information about assets included in a financial deal.

Use the new FinancialDealAsset object.

New Fields on Financial Deal Party

View the current stage of the party involved with the financial deal.

Use the new Stage field.

View the date when the stage of the party involved in the financial deal was last changed.

Use the new LastStageChangeDate field.

Record Alert

View an alert message about a specific record and track the status and active period of the alert.

Use the new RecordAlert object.

Tag Category

Group and manage interest tags with tag category.

Use the new TagCategory object.

REST API

Financial Services Cloud REST API includes enhanced calls.

Record Alerts

Retrieve active record alerts on financial accounts

Make a GET request to the new

/financialservices/recordalerts/financialaccount/\${financialAccountId}resource.

New response body: Record Alert Collection

Retrieve active record alerts on person accounts

Make a GET request to the new /financialservices/recordalerts/person/\${personId} resource.

New response body: Record Alert Collection

Apex: New Items

These methods and classes are new.

ConnectApi Namespace

The ConnectApi namespace has these new methods and classes.

Methods

These new methods are in the ConnectApi.RecordAlert class.

Retrieve the list of active record alerts on financial accounts

getRecordAlertsForFinancialAccount(financialAccountId)

New output class: ConnectApi.RecordAlertCollection

Retrieve the list of active record alerts on person accounts

getRecordAlertsForPersonAccount(personId)

New output class: ConnectApi.RecordAlertCollection

Health Cloud

Health Cloud has expanded its support for your patients' safety and privacy. Now you can protect sensitive information by verifying the identity of callers, and RxNorm is available to help with prescription safety, along with an improved Patient Medication Manager Lightning component. Use Intelligent Sales to get ahead of inventory problems with enhanced support for cycle counts. Provider Network Management now supports contracting for payers and providers. And get ready to switch to the Lead object for bringing in patients now that Candidate Patient is going away.

IN THIS SECTION:

Identity Verification

When patients or providers contact a call center for information, agents must verify their identity first. If the verification succeeds, only then agents can provide the information requested. Now you can support your agents to ensure that a caller is indeed who they claim to be before they process the caller's request involving sensitive information.

Candidate Patient Object Is No More

The Candidate Patient custom object has been retired. Users are no longer able to create new records in this object, but are still able to view records that were already created. Consider using Lead instead.

Intelligent Sales Enhancements

Help your organization get ahead of inventory problems with the new cycle count enhancement for Intelligent Sales. Sales ops teams can schedule planned cycle counts from the comfort of their desks. Sales reps can set up ad hoc cycle counts on the go from the convenience of their mobile devices. Sales reps can also easily execute cycle counts from the mobile app, which comes with barcode scanning capabilities for quickly taking stock of their inventory. And finally, we've made it easier for you to set up work types for cycle counts in just a few clicks using the Intelligent Sales Settings page.

Medication Review (Formerly Medication Management)

With Medication Review (formerly called Medication Management), your users can easily review patients' medication lists and avoid potential medication-related errors. The integration with RxNorm brings in standardized medication data that can be used to help improve patient outcomes and reduce healthcare costs.

New: Medication Management Add-On

Medication Management is a Health Cloud Add-On product feature that helps clinicians oversee the medication regimen of their patients, helping to protect patient safety and reduce healthcare costs. Clinicians can perform a medication reconciliation of their patients' medication regimen, stay informed about any potential drug-to-drug interactions, and add relevant recommendations.

Provider Network Management

Provider Network Management now offers a solution to help with all your contracting needs. Your users can record contract terms for payers, providers, and provider groups to ensure that contracts have appropriate payments and providers have greater accountability to provide better patient care. Get support for both standard and custom payment types with the help of our extensible data model and interface.

Customer 360 Guide for Healthcare Payers

Build member trust with personalized and guided experiences that drive customer satisfaction. The assets in this Customer 360 Guide help healthcare payer organizations 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.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

Health Cloud Has New Invocable Actions

Do more with these new invocable actions in Health Cloud.

REST API

Health Cloud REST API includes enhanced calls.

Identity Verification

When patients or providers contact a call center for information, agents must verify their identity first. If the verification succeeds, only then agents can provide the information requested. Now you can support your agents to ensure that a caller is indeed who they claim to be before they process the caller's request involving sensitive information.

IN THIS SECTION:

Protect Health Information by Verifying Caller Identity

Help your call center agents comply with regulations like HIPAA that protect personal health information. When a patient or member call involves confidential information, agents can verify the caller's identity by requesting date of birth, address, or other identifying information that you specify.

Verify Callers Before Sharing Sensitive Information

The Verify Caller Identity flow template uses configuration information from the identity verification process setup records to guide your users through the process of verifying caller identity. Use the template to create your own custom identity verification flow.

Build Identity Verification Context

The Verify Caller Identity flow template uses the Build Identity Verification Context invocable action, which queries the identity verification setup objects to build the verification context.

Get Verification Data

The Verify Caller Identity flow template uses the Get Verification Data invocable action, which queries Salesforce for verification data and returns the verification context with the information required to verify a caller. To use this action, the caller must already be identified.

Extend Your Identity Verification Flows with Custom Flow Screen Components

To create an identity verification flow from scratch, you have two new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Caller Identity flow template, these screen components are by default present in the flow.

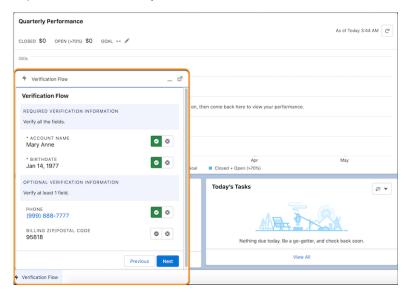
Protect Health Information by Verifying Caller Identity

Help your call center agents comply with regulations like HIPAA that protect personal health information. When a patient or member call involves confidential information, agents can verify the caller's identity by requesting date of birth, address, or other identifying information that you specify.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to users who are assigned the Health Cloud permission set license.

Why: Your call center agents are entrusted with protecting the personal information of patients or members who call in. From within the Health Cloud console, agents can quickly assess whether a call involves private information, ask for verifying information, and then help the caller with what they need.



How: Identity Verification comes with default questions and search already set up. To customize the questions or change the fields used to search, from Setup, in the Quick Find box, enter <code>Identity Verification</code>. Make sure to modify the Verify Caller Identity flow to reference your changes. Then embed the Verify Caller Identity flow in the utility bar of a Lightning app or add it to a Lightning record page.

SEE ALSO:

Protect Personal Health Information

Verify Callers Before Sharing Sensitive Information

The Verify Caller Identity flow template uses configuration information from the identity verification process setup records to guide your users through the process of verifying caller identity. Use the template to create your own custom identity verification flow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to users who are assigned the Health Cloud permission set license.

How: Treat the Verify Caller Identity flow template as read-only. Create a flow using the template and customize it to meet your business requirements. Then, make the flow available to agents by embedding it in the utility bar in a Lightning app or by adding it to a Lightning record page.

SEE ALSO:

Salesforce Flow for Identity Verification

Build Identity Verification Context

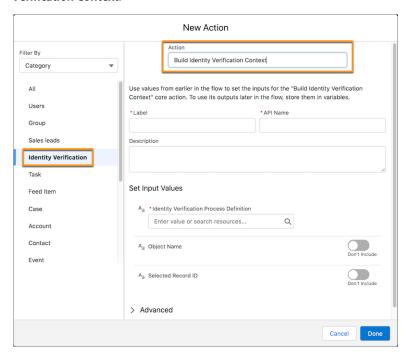
The Verify Caller Identity flow template uses the Build Identity Verification Context invocable action, which queries the identity verification setup objects to build the verification context.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to users who are assigned the Health Cloud permission set license.

Why: The verification context contains details required to run the Verify Caller Identity Flow, such as the data source type, the object to be searched, the type of search, the minimum number of optional verifying questions to ask, and more.

How: To use the Build Identity Verification Context action, in the Flow Builder, add an action to a flow and select **Build Identity Verification Context**.



SEE ALSO:

Invocable Actions in Health Cloud Add and Edit Elements

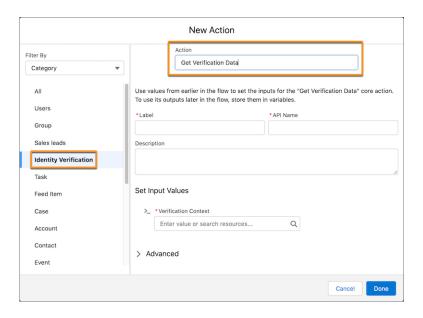
Get Verification Data

The Verify Caller Identity flow template uses the Get Verification Data invocable action, which queries Salesforce for verification data and returns the verification context with the information required to verify a caller. To use this action, the caller must already be identified.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to users who are assigned the Health Cloud permission set license.

How: To use the Get Verification Data action, in the Flow Builder, add an action to a flow and select Get Verification Data.



SEE ALSO:

Invocable Actions in Health Cloud Add and Edit Elements

Extend Your Identity Verification Flows with Custom Flow Screen Components

To create an identity verification flow from scratch, you have two new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Caller Identity flow template, these screen components are by default present in the flow.

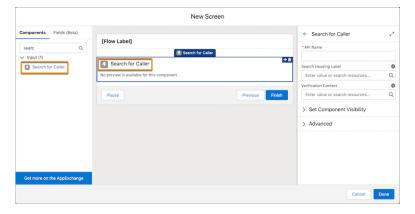
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

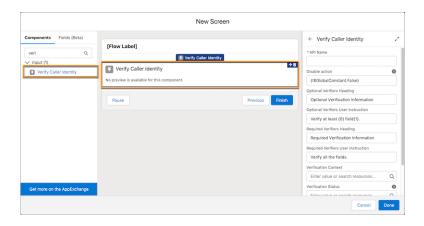
Who: These flow screen components are available to users who are assigned the Health Cloud permission set license.

Why: Create screen flows that display data in a way that it's easier for your users to search for callers and verify their identity.

- The Search for Caller flow screen component is used to search records in Salesforce and to display search results.
- The Verify Caller Identity flow screen component is used to show and verify the information required to confirm a caller's identity.

How: To add the Search for Caller or the Verify Caller Identity flow screen component, in the Flow Builder, add a screen element to the flow you're creating. Select the **Search for Caller** or **Verify Caller** flow screen component in the New Screen window, and enter the screen properties.





SEE ALSO:

Flow Screen Input Component: Search for Caller Flow Screen Input Component: Verify Caller Identity

Candidate Patient Object Is No More

The Candidate Patient custom object has been retired. Users are no longer able to create new records in this object, but are still able to view records that were already created. Consider using Lead instead.

Where: This change applies to Lightning Experience and Salesforce Classic 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, create a custom field to do the job.

Intelligent Sales Enhancements

Help your organization get ahead of inventory problems with the new cycle count enhancement for Intelligent Sales. Sales ops teams can schedule planned cycle counts from the comfort of their desks. Sales reps can set up ad hoc cycle counts on the go from the convenience of their mobile devices. Sales reps can also easily execute cycle counts from the mobile app, which comes with barcode scanning capabilities for quickly taking stock of their inventory. And finally, we've made it easier for you to set up work types for cycle counts in just a few clicks using the Intelligent Sales Settings page.



Note: Intelligent Sales can't be used offline on the desktop or mobile app.

IN THIS SECTION:

Schedule Planned Cycle Counts from the Desktop

Make sure that inventory numbers are correct across your organization by scheduling planned inventory cycle counts using Intelligent Sales. Cycle counts help ensure that inventories have fewer discrepancies and surprises, thereby reducing inventory write-off costs. Your sales ops team can set up cycle counts for specific sales reps with specific product types at specific locations.

Schedule Ad Hoc Cycle Counts from the Mobile App

Your sales reps can audit inventory on the go by setting up ad hoc cycle counts using the mobile app. Ad hoc cycle counts come in handy when your reps suspect that there's something wrong with their inventories, but can't wait until the next planned count. A rep can simply fire up the Salesforce app on their mobile device, go to the Inventory Cycle Counts page, and create a cycle count visit. The rep can choose everything from the action plan template to the products and inventory location for the count.

Work with the Latest Data When Performing Cycle Counts

Help your sales reps get the latest and most accurate information for their cycle counts using automated processes in Intelligent Sales. When a rep starts a cycle count visit, the expected quantities for products in that count are automatically pulled from inventory records in your Salesforce org. These numbers are then saved as the KPI contexts for that count, ensuring that your sales rep isn't working with outdated data. Having fresh and accurate data helps you reduce the operational costs and time associated with resolving inventory discrepancies.

Perform Cycle Counts Using the Mobile App

The traditional way of performing cycle counts is a long and tiresome process. Inventory owners have to handle different types of data and manually count every piece of equipment at a location. Intelligent Sales eases this process by pulling in the expected numbers for products from their inventory records as the KPI contexts for counts. And that's not all—the barcode scanner in the mobile app helps sales reps quickly and easily scan through the product inventory they have on hand. This scan makes the cycle count process shorter and reduces the likelihood of data entry errors.

Configure Your Intelligent Sales Implementation for Your Business

Intelligent Sales provides a flexible framework that lets you configure the visit execution process to align better with the needs of your business. We've added the Actions button on the Cycle Count Products screen that you can use to launch your own custom flows. You could create flows to mark inventory as lost, add notes, initiate transfers, or any other actions you'd want to consider in a count.

Configure Work Types for Cycle Counts

Set up work types for cycle counts with just a few clicks on the Intelligent Sales Settings page . You can specify which work types are used for cycle counts and whether the counts created with those work types are factored into inventory projections. You can also configure work types for blind cycle counts from their record pages.

Schedule Planned Cycle Counts from the Desktop

Make sure that inventory numbers are correct across your organization by scheduling planned inventory cycle counts using Intelligent Sales. Cycle counts help ensure that inventories have fewer discrepancies and surprises, thereby reducing inventory write-off costs. Your sales ops team can set up cycle counts for specific sales reps with specific product types at specific locations.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Giving your sales reps and other stakeholders greater visibility into their inventories helps them identify missing inventory or products that are expiring soon, so that sales reps can better plan their sales visits. Your sales ops teams can also schedule multiple cycle counts for a rep at one go.

How: On the Intelligent Sales Settings page, define a work type configured specifically for cycle counts. Your sales ops teams can schedule cycle counts by creating visits, using the work type you created, from the Intelligent Sales home page.

Schedule Ad Hoc Cycle Counts from the Mobile App

Your sales reps can audit inventory on the go by setting up ad hoc cycle counts using the mobile app. Ad hoc cycle counts come in handy when your reps suspect that there's something wrong with their inventories, but can't wait until the next planned count. A rep can simply fire up the Salesforce app on their mobile device, go to the Inventory Cycle Counts page, and create a cycle count visit. The rep can choose everything from the action plan template to the products and inventory location for the count.

Where: This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Giving your sales reps the flexibility to schedule counts themselves reduces their dependency on sales ops teams to help manage their inventory. These ad hoc counts could also help sales reps prepare before high value visits, just to make sure that they have everything they need.

How: On the Intelligent Sales Settings page, define a work type configured specifically for cycle counts. There's no additional setup required. One of the work types that you created is automatically selected when a rep schedules a count from the mobile app. Cycle count work types marked for blind cycle counts are given preference in this automatic selection.

Work with the Latest Data When Performing Cycle Counts

Help your sales reps get the latest and most accurate information for their cycle counts using automated processes in Intelligent Sales. When a rep starts a cycle count visit, the expected quantities for products in that count are automatically pulled from inventory records in your Salesforce org. These numbers are then saved as the KPI contexts for that count, ensuring that your sales rep isn't working with outdated data. Having fresh and accurate data helps you reduce the operational costs and time associated with resolving inventory discrepancies.

Where: This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

How: Ensure that your action plan templates for cycle counts are modeled with the appropriate visit task contexts. No additional setup is required.

SEE ALSO:

Salesforce Help: Set Up Visit Tasks and Action Plan Templates for Cycle Counts

Perform Cycle Counts Using the Mobile App

The traditional way of performing cycle counts is a long and tiresome process. Inventory owners have to handle different types of data and manually count every piece of equipment at a location. Intelligent Sales eases this process by pulling in the expected numbers for products from their inventory records as the KPI contexts for counts. And that's not all—the barcode scanner in the mobile app helps sales reps quickly and easily scan through the product inventory they have on hand. This scan makes the cycle count process shorter and reduces the likelihood of data entry errors.

Where: This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Your sales reps can complete the cycle counts assigned to them using the Salesforce app on their mobile devices. They can manually count and record the quantities of their products, or use the built-in barcode scanner to scan the serial numbers of all their products. Validations built into the app let your reps know if any serial numbers are missing or if an item is found at an unexpected location.

How: No additional setup is required.

Configure Your Intelligent Sales Implementation for Your Business

Intelligent Sales provides a flexible framework that lets you configure the visit execution process to align better with the needs of your business. We've added the Actions button on the Cycle Count Products screen that you can use to launch your own custom flows. You could create flows to mark inventory as lost, add notes, initiate transfers, or any other actions you'd want to consider in a count.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: Create flows or subflows using the variable names and types we specify. You can then create a mobile record page for Visit, add the Task List for Medical Devices component to the page, and configure the component with your custom flows.

Configure Work Types for Cycle Counts

Set up work types for cycle counts with just a few clicks on the Intelligent Sales Settings page. You can specify which work types are used for cycle counts and whether the counts created with those work types are factored into inventory projections. You can also configure work types for blind cycle counts from their record pages.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Why: Because visit records are used for both surgical case visits and cycle counts, it's important that you set up the right work types for both types of visits. If you don't, cycle count visits are also considered in inventory projections. You can exclude cycle count visits from inventory projections by making sure that the work type used for counts isn't marked for inventory projections.

How: From Setup, find and select Intelligent Sales Settings. If Intelligent Sales is enabled, you'll see a section where you can create and configure work types.

Medication Review (Formerly Medication Management)

With Medication Review (formerly called Medication Management), your users can easily review patients' medication lists and avoid potential medication-related errors. The integration with RxNorm brings in standardized medication data that can be used to help improve patient outcomes and reduce healthcare costs.

Medication Review is a Health Cloud feature released in Winter '22 that allows clinicians to view the list of medications a patient is taking or has taken in the past. Clinicians can view and document the details of the medication, the dosage information, who prescribed the medication, and the pharmacy dispense details. Clinicians can also add new medications to a patient's medication profile.

Health Cloud stores the medication-related information in its FHIR-aligned clinical data model. Using the Salesforce platform allows customers to take full advantage of capabilities such as a timeline view of medications, integration with external systems, and omnichannel capabilities.



Important: Health Cloud Medication Review and Medication Management are 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.

These products use publicly available data and APIs provided courtesy of the U.S. National Library of Medicine, National Institutes of Health, Department of Health and Human Services (NLM). NLM is not responsible for the product and does not endorse or recommend them or any other product.

IN THIS SECTION:

Enjoy More Flexibility with Custom Flows to Add Medications

Configure the Patient Medication Manager lightning component to use your own custom flows to add medications for patients.

Get More Information on Each Medication

Now your users can get all their patient's medication details in one place. The Patient Medication Manager Lightning component now includes the medication request and medication dispensation information for each medication.

Know What's Changed in Medication Review Org Preference Settings

We now need your acknowledgment of our terms of use before you can enable Medication Review for your org. Existing customers are also required to mark their acknowledgment on the Medication Management and Medication Review Settings page to continue using the feature.

Make the Most of the Enhanced Patient Medication Manager Lightning Component

We've updated the Patient Medication Manager Lightning component to enhance your users' experience.

SEE ALSO:

Health Cloud Administration Guide: Medication Review

Health Cloud User Guide: Medication Review

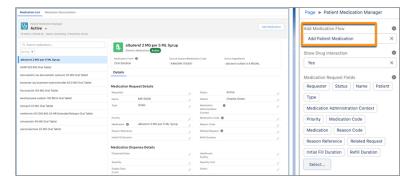
Enjoy More Flexibility with Custom Flows to Add Medications

Configure the Patient Medication Manager lightning component to use your own custom flows to add medications for patients.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Why: If the default Add Patient Medication flow doesn't meet all your business needs, you can replace it with your own flow in the Patient Medication Manager lightning component. In your flow, use an input variable named recorded for person account records to make the flow compatible with the component.

How: Edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, from the Add Medication Flow list, select your custom flow.

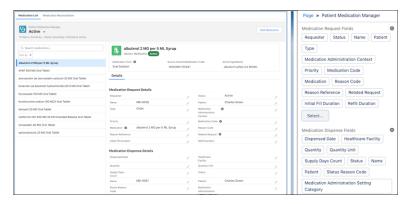


Get More Information on Each Medication

Now your users can get all their patient's medication details in one place. The Patient Medication Manager Lightning component now includes the medication request and medication dispensation information for each medication.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

How: Edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, select the fields that you need from the Medication Request Fields and the Medication Dispense Fields sections.



Know What's Changed in Medication Review Org Preference Settings

We now need your acknowledgment of our terms of use before you can enable Medication Review for your org. Existing customers are also required to mark their acknowledgment on the Medication Management and Medication Review Settings page to continue using the feature.

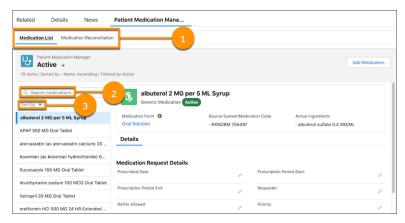
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Make the Most of the Enhanced Patient Medication Manager Lightning Component

We've updated the Patient Medication Manager Lightning component to enhance your users' experience.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

How:



- Medication list view and medication reconciliation view are grouped into separate tabs (1).
- Searches in the medication list now run across all status filters (2).
- Medication lists can now be sorted by names or modified dates (3).
- Medication lists are auto-refreshed when a medication status is updated.

New: Medication Management Add-On

Medication Management is a Health Cloud Add-On product feature that helps clinicians oversee the medication regimen of their patients, helping to protect patient safety and reduce healthcare costs. Clinicians can perform a medication reconciliation of their patients' medication regimen, stay informed about any potential drug-to-drug interactions, and add relevant recommendations.

(1) Important: Health Cloud Medication Review and Medication Management are 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.

These products use publicly available data and APIs provided courtesy of the U.S. National Library of Medicine, National Institutes of Health, Department of Health and Human Services (NLM). NLM is not responsible for the product and does not endorse or recommend them or any other product.

IN THIS SECTION:

Protect Patient Safety During Care Transition Using Medication Reconciliation

With the new Medication Reconciliation tab on the Patient Medication Manager Lightning component, your users can perform comprehensive reviews of their patients' medications through transitions of care. Based on review findings, your users can easily spot potential medication errors and add relevant recommendations for their patients.

Find Potential Drug Interactions in a Patient's Medication Regimen

The Patient Medication Manager Lightning component is now more deeply integrated with RxNorm services. The component helps to inform your users if it detects any drug-to-drug interactions for the patient's medications.

SEE ALSO:

Health Cloud Administration Guide: Medication Management

Health Cloud User Guide: Medication Management

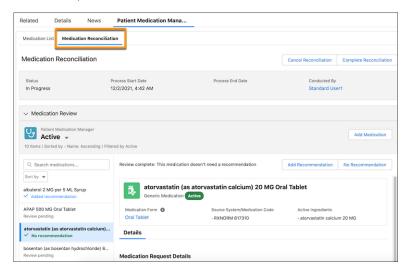
Health Cloud Developer Guide: Medication Management Data Model

Protect Patient Safety During Care Transition Using Medication Reconciliation

With the new Medication Reconciliation tab on the Patient Medication Manager Lightning component, your users can perform comprehensive reviews of their patients' medications through transitions of care. Based on review findings, your users can easily spot potential medication errors and add relevant recommendations for their patients.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Why: Validations prevent users from completing reviews until each medication is marked as requiring a recommendation or not. This validation helps to ensure that no medication is overlooked in a medication review.



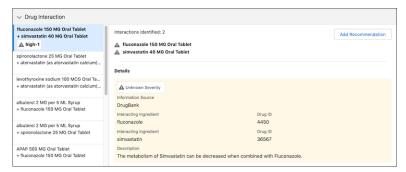
How: From Setup, in the Quick Find box, enter *Medication Management and Medication Review Settings*, and then select **Medication Management and Medication Review Settings**. Acknowledge the terms of use, and then enable Medication Management. Next, edit a person account's Lightning record page, and select Patient Medication Manager component. In the Properties pane, select a medication flow, enable the Drug Interaction section, and select the fields that you need.

Find Potential Drug Interactions in a Patient's Medication Regimen

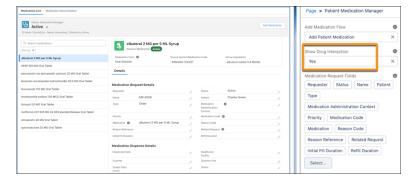
The Patient Medication Manager Lightning component is now more deeply integrated with RxNorm services. The component helps to inform your users if it detects any drug-to-drug interactions for the patient's medications.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Person Accounts are enabled.

Why: If any drug-to-drug interactions are detected, the interacting ingredients and their severity are listed in the Drug Interactions section on the Medication Reconciliation tab. Spotting these interactions early can help your users to improve outcomes and reduce costs for their patients and providers.



How: Edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, in the Show Drug Interaction list, select **Yes**.



Provider Network Management

Provider Network Management now offers a solution to help with all your contracting needs. Your users can record contract terms for payers, providers, and provider groups to ensure that contracts have appropriate payments and providers have greater accountability to provide better patient care. Get support for both standard and custom payment types with the help of our extensible data model and interface.

Provider Network Management is available in Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

IN THIS SECTION:

Manage Payment Agreement Terms for Contracts

Enable your contracting specialist to easily provide well-defined payment agreement terms for a provider network contract.

Gain Flexibility with Custom Contract Payment Agreement Types

If your organization follows contract payment agreement types that are different from the ones we support by default, you can use custom objects to support those types.

Manage Network Participation Records Associated with a Contract

Your users can now easily view, update, and delete network participation records that are associated with a contract.

Enable Site User Access for Provider Network Management

Give site users access to Provider Network Management to help them easily manage their provider networks and contract payment terms.

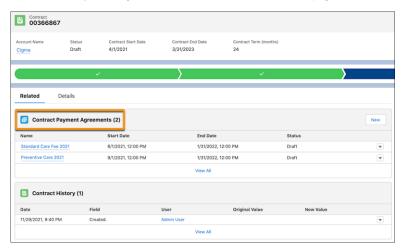
Manage Payment Agreement Terms for Contracts

Enable your contracting specialist to easily provide well-defined payment agreement terms for a provider network contract.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Why: Make it easier for your users to manage the supported types of payment agreements using our comprehensive contract management solution that includes:

- Contract Payment Agreement object and child objects
- Contract Payment Agreement Terms Lightning component on the Contract page
- Contract Payment Agreements related list on the Contract page



How: Add the Contract Payment Agreements related list to the contract record page layout.

Gain Flexibility with Custom Contract Payment Agreement Types

If your organization follows contract payment agreement types that are different from the ones we support by default, you can use custom objects to support those types.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

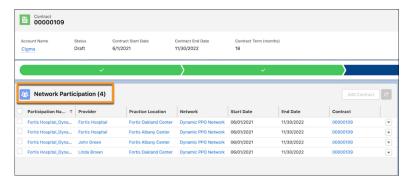
How: Create a custom object for the new payment type, and then add a matching picklist value to the Agreement Type picklist on the Contract Payment Agreement object.

Manage Network Participation Records Associated with a Contract

Your users can now easily view, update, and delete network participation records that are associated with a contract.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Why: The Network Participation section on the Contract page provides a consolidated list of all associated network participation records. Your contracting specialists no longer have to navigate to multiple pages to get the information they need.



How: Edit the contract record page, and add the Network Participation Lightning component to the page.

Enable Site User Access for Provider Network Management

Give site users access to Provider Network Management to help them easily manage their provider networks and contract payment terms.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

Who: New and existing site users need these permissions to access all Provider Network Management features:

- Health Cloud for Experience Cloud Sites permission set license
- Provider Network Management for Experience Cloud Sites permission set

Customer 360 Guide for Healthcare Payers

Build member trust with personalized and guided experiences that drive customer satisfaction. The assets in this Customer 360 Guide help healthcare payer organizations 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.

IN THIS SECTION:

Explore Healthcare Payer 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. Customers who excel in these business scenarios foster loyalty and build customers for life.

SEE ALSO:

Customer 360 Guide for Healthcare Payers

Explore Healthcare Payer 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. Customers who excel in these business scenarios foster loyalty and build customers for life.

How: Visit the three Business Scenarios for the Customer 360 Guide for Healthcare Payers:

• Optimize Healthcare Payer Reach and Acquisition

- Transform the Healthcare Payer Service Experience
- Personalize Care in Healthcare Payer Organizations

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

Identity Verification

Represent the identity verification process definition

Use the Identity Verification Process Definition object.

Configure search for the identity verification process and the minimum number of verifiers

Use the Identity Verification Process Details object.

Configure verifiers

Use the Identity Verification Process Field object.

Medication Management

Store information about a medication reconciliation conducted for a patient

Use the new MedicationReconciliation object.

Associate a medication recommendation to a medication reconciliation

Use the new MedicationReconciliationRecommendation object.

Associate a medication recommendation to a medication statement

Use the new MedicationReconciliationStatementRecommendation object.

FHIR R4-Aligned Data Model

Store dispense details of a medication

Use the new MedicationDispense object.

Add additional details to a medication statement

Use the new MedicationStatementDetail object.

Provider Network Management

Define fee schedule information for contracts of Standard Care Fee Agreement types

Use the new FeeScheduleDefinition object.

Specify procedure level fees for a fee schedule definition

Use the new CareFeeScheduleItem object.

Store information about the contract payment agreement associated with a contract

Use the new ContractPaymentAgreement object.

Specify the payment terms for contracts of Standard Care Fee Agreement type

Use the new StandardCareFeeAgreement object.

Specify the payment terms for contracts of Shared Saving Payment Agreement type

Use the new SharedSavingPaymentAgreement object.

Specify the payment terms for contracts of Capitation Care Fee Agreement type

Use the new CapitationCareFeeAgreement object.

Specify the payment terms for contracts of Categorized Care Fee Agreement

Use the new CategorizedCareFeeAgreement object.

Specify the payment terms for contracts of Percentile Based Care Fee Agreement

Use the new PercentileBasedCareFeeAgreement object.

Specify the payment terms for contracts of Bundled Care Fee Agreement

Use the new BundledCareFeeAgreement object.

Specify the payment terms for contracts of Preventive Care Fee Agreement

Use the new PreventiveCareFeeAgreement object.

Intelligent Sales

Indicate that visits created using a work type are factored into inventory projections

Use the new IsUsedForInventoryProjection field on the WorkType object.

Indicate that visits created using a work type are used for cycle counts

Use the new IsCycleCounting field on the WorkType object.

Indicate that visits created using a cycle count work type are blind cycle counts

Use the new IsBlindCycleCounting field on the WorkType object.

SEE ALSO:

Health Cloud Developer Guide: Identity Verification Data Model

Health Cloud Developer Guide: Medication Management DataModel

Health Cloud Developer Guide: Clinical Data Model

Health Cloud Developer Guide: Provider Network Management Data Model

Health Cloud Developer Guide: Intelligent Sales Data Model

Health Cloud Has New Invocable Actions

Do more with these new invocable actions in Health Cloud.

Identity Verification

Build identity verification context using the information passed into a flow

Use the BuildIdentityVerification invocable action.

Query Salesforce for the data required to verify caller identity

Use the GetVerificationData invocable action.

SEE ALSO:

Invocable Actions in Health Cloud

REST API

Health Cloud REST API includes enhanced calls.

Medication Statement

Create a patient's medication statement

Make a POST request to the new

/connect/health/clinical/patients/\${patientId}/medication-statementresource.

New request body: Med Statement Input Payload

New response body: Medication Statement Output

SEE ALSO:

Health Cloud Developer Guide: Create Medication Statements

Loyalty Management

Now your loyalty program managers can set up processes for loyalty programs by using Promotion Setup. Decouple your points expiration process from Loyalty Ledger records and create space for new ledgers. Use Interaction Studio to provide targeted promotions to members in real time. Run a loyalty program on a B2C Commerce site. Sign up for a trial org for Loyalty Management. Personalize the Loyalty Ledger page layout for your users and secure your members' data effectively.

IN THIS SECTION:

Promotion Setup

Now your program managers can create processes that decide how transaction journals get processed in the Loyalty Management app. Associate processes with promotions to ensure that their run is limited to the duration of the promotion.

Make Space for New Ledgers

Decouple points expiration process from loyalty ledger records to optimize storage. Aggregate fixed-model, non-qualifying points in the Loyalty Aggregated Point Expiration Ledger object and use its records to expire member points. After you start aggregating points expiration data in Loyalty Aggregated Point Expiration Ledger, you can archive the existing Loyalty Ledger records that you don't need.

Target Members with Promotions in Real Time with Interaction Studio

Combine the power of Salesforce CDP and Interaction Studio to offer promotions in real time. Create personalized experiences for members by intelligently offering promotions in real time based on the Salesforce CDP segment.

Run a Loyalty Program on B2C Commerce Site

Customers can join a loyalty program on your B2C Commerce site. Provide members information about their loyalty program membership. Let members accrue and redeem points for orders placed. Show members promotions that are available to them. Enable members to redeem their vouchers.

Vouchers

Update existing voucher definitions to issue partially redeemable vouchers. Modify issued vouchers.

Get a Loyalty Management License Based on Your Needs

Loyalty Management licenses now better match the scale of your loyalty programs. The new licenses are Loyalty Management - Starter, Loyalty Management - Advanced. The licenses that were available until Winter '22 have been removed.

Try Loyalty Management for Free

Get firsthand experience on the capabilities of Salesforce Loyalty Management for free! Sign up your admins, architects, and developers for an unconfigured Loyalty Management trial org. Create a customized loyalty program and try out the process automation tools, such as Data Processing Engine, Batch Management, and Decision Tables.

Other Changes in Loyalty Management

Learn about the other changes that we made to improve usability.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

REST API

Loyalty Management REST API includes enhanced calls.

New Invocable Action in Loyalty Management

Use the new invocable action for Loyalty Management.

New and Changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types of Loyalty Management.

Promotion Setup

Now your program managers can create processes that decide how transaction journals get processed in the Loyalty Management app. Associate processes with promotions to ensure that their run is limited to the duration of the promotion.

IN THIS SECTION:

Design Business Scenarios to Process Transactions

Now your loyalty program managers can create and update their own program processes for new and incoming transaction journals. For example, create a process to credit points and issues a voucher to members each time they place an order. Use another process to debit member points for a redemption type transaction.

Update Values Used in Rules with Ease

Now your loyalty program managers can process transactions with the help of parameters that define values for conditions and in actions. Use parameters to easily update changing values instead of deactivating a rule and then changing values manually.

Configure Your Business Scenario

Use conditions and actions in a rule to design a business scenario for processing transaction journals. You can associate a rule with a promotion. The rule's start date, end date, and status are set according to the corresponding values of the associated promotion.

Process Transactions According to Your Business Requirements

Promotion Setup can process transactions in two modes: in real time as soon as members make a purchase or in scheduled batches of multiple transactions. If you use both modes, you can decide which transactions are processed in real time and which are processed in batches.

Launch Flows for Transactions

Loyalty program managers can collaborate with admins when creating a loyalty program process. The Run a Flow action allows program managers to run flows that are of the type Loyalty Management Flow. You can add Assignment, Decision, and Action elements to your flow. For example, a rule can run a flow that sends surveys to members after points have been credited to the member.

Design Business Scenarios to Process Transactions

Now your loyalty program managers can create and update their own program processes for new and incoming transaction journals. For example, create a process to credit points and issues a voucher to members each time they place an order. Use another process to debit member points for a redemption type transaction.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

New Loyalty Program Process Process Details • Name Description Credit Points for Transactions Status * Process Execution Method 0 • Draft Batch Loyalty Program Process Type Transaction Journal Cloud Kicks Inner Circle Transaction Details Journal Type 0 Journal Subtype 0 Q Search Journal SubTypes... × Accrual

Save & New

Who: To create program processes, users need the Loyalty Management permission set.

SEE ALSO:

Salesforce Help: Create a Loyalty Program Process (Right-click to view in a new tab or window.)

Salesforce Help: Key Terms of Promotion Setup (Right-click to view in a new tab or window.)

Loyalty Management Developer Guide: LoyaltyProgramSetup (Right-click to view in a new tab or window.)

Save

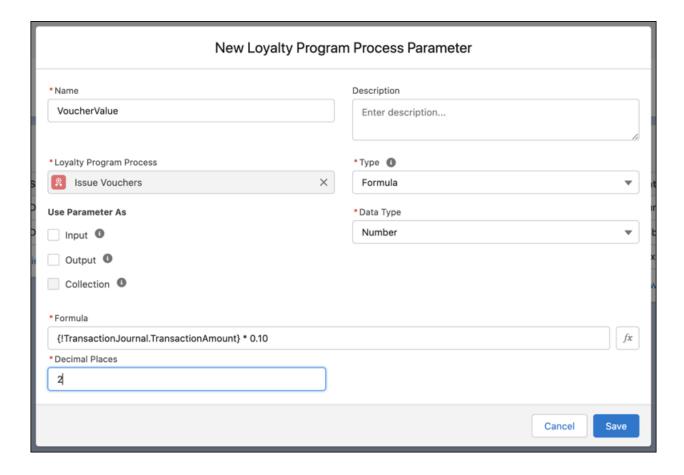
Update Values Used in Rules with Ease

Cancel

Now your loyalty program managers can process transactions with the help of parameters that define values for conditions and in actions. Use parameters to easily update changing values instead of deactivating a rule and then changing values manually.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

Why: For example, a program manager wants to issue a voucher to members who placed an order of \$100 or more. The value of the voucher must be 10% of the transaction amount. The manager uses two parameters for this scenario. The first parameter stores a constant value of 100 and verifies whether the transaction value is above \$100. The second, is a formula parameter, determines the voucher value. The formula is *{!TransactionJournal.TransactionAmount}* * 0.10, and it's used in the Issue Voucher action to determine the voucher value.



SEE ALSO:

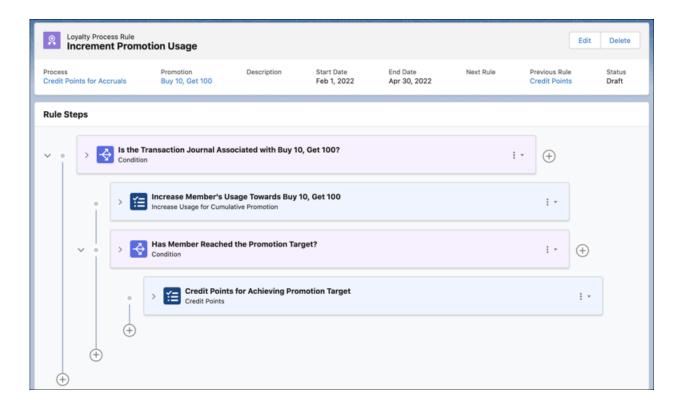
Salesforce Help: Create a Parameter (Right-click to view in a new tab or window.)

Configure Your Business Scenario

Use conditions and actions in a rule to design a business scenario for processing transaction journals. You can associate a rule with a promotion. The rule's start date, end date, and status are set according to the corresponding values of the associated promotion.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

Why: For example, a loyalty program manager wants to issue vouchers to Gold and Platinum tier members who make a purchase during the end-of-year sale. The program manager associates the promotion to the rule. In the rule, a condition group is created. The first condition verifies that the member belongs to the Gold tier, and then issues a \$15 voucher if the condition matches. The second condition verifies that the member belongs to the Platinum tier, and then issues a \$25 voucher if the conditions match. The default path runs a flow that emails Silver tier members know they can receive a \$15 voucher if they upgrade to the Gold tier.



SEE ALSO:

Salesforce Help: Create a Rule (Right-click to view in a new tab or window.)

Salesforce Help: Conditions (Right-click to view in a new tab or window.)

Salesforce Help: Actions (Right-click to view in a new tab or window.)

Salesforce Help: Add Conditions and Actions to a Rule (Right-click to view in a new tab or window.)

Process Transactions According to Your Business Requirements

Promotion Setup can process transactions in two modes: in real time as soon as members make a purchase or in scheduled batches of multiple transactions. If you use both modes, you can decide which transactions are processed in real time and which are processed in batches.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

How: To process transactions in real time, developers must configure a Connect API that creates and processes transaction journals. Ensure that your admins or developers use the Run Program Process for Transaction Journal action to decide which pending transaction journals are processed and at what time.

SEE ALSO:

Salesforce Help: Transaction Journal Processing (Right-click to view in a new tab or window.)

Loyalty Management Developer Guide: Run Program Process for Transaction Journal (Right-click to view in a new tab or window.)

Loyalty Management Developer Guide: Promotion Setup (Right-click to view in a new tab or window.)

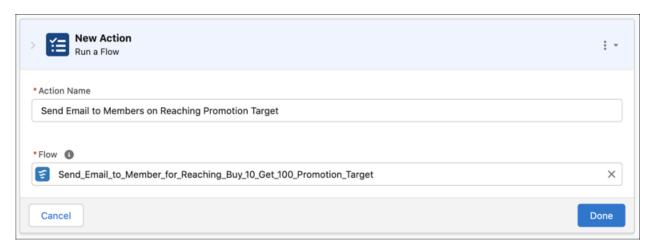
Launch Flows for Transactions

Loyalty program managers can collaborate with admins when creating a loyalty program process. The Run a Flow action allows program managers to run flows that are of the type Loyalty Management Flow. You can add Assignment, Decision, and Action elements to your flow. For example, a rule can run a flow that sends surveys to members after points have been credited to the member.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

Who: To create flows, users need the Manage Flows permission.

How: From Setup, in the Quick Find box, enter Flows, and then select **Flows**. Click **New** > **All** + **Templates**. Select **Loyalty Management Flow**, and then click **Next**. Create the flow, and then save it. After the flow is saved, loyalty program managers can select the flow in the Run a Flow action.



SEE ALSO:

Salesforce Help: Loyalty Management Flow Type (Right-click to view in a new tab or window.)
Salesforce Help: Flow Types (Right-click to view in a new tab or window.)

Make Space for New Ledgers

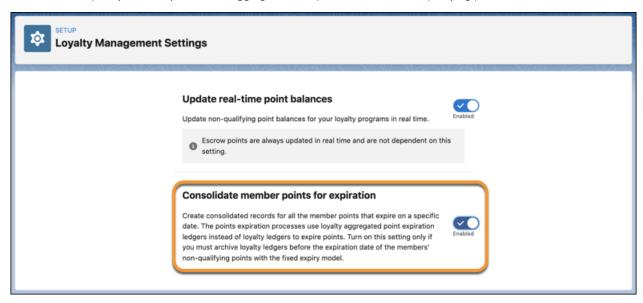
Decouple points expiration process from loyalty ledger records to optimize storage. Aggregate fixed-model, non-qualifying points in the Loyalty Aggregated Point Expiration Ledger object and use its records to expire member points. After you start aggregating points expiration data in Loyalty Aggregated Point Expiration Ledger, you can archive the existing Loyalty Ledger records that you don't need.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

Why: Use the new points expiration process if you have a mechanism to archive ledgers that you no longer need for reporting or processing. This process consolidates points for expiration if multiple transaction journals or ledgers are created for a member's activities and the member's points expire on the same date. For example, a member places two orders and each order has multiple order lines. The points expire at the end of January 2022. After the member's transactions are processed, the member accrues non-qualifying points. When the Aggregate Fixed Non-Qualifying Points in Expiration Ledgers Data Processing Engine definition runs, it creates a Loyalty Aggregated Points Expiration Ledger record for the member. The record contains details of the number of points that expire at the end of January 2022 for the currency. When the Expire Fixed Non-Qualifying Points Using Aggregated Expiration Ledgers definition runs on January 31, 2022, the member's points are expired.

How: The Aggregate Fixed Non-Qualifying Points in Expiration Ledgers Data Processing Engine definition aggregates points by currency, associated member, and expiration date. The Expire Fixed Non-Qualifying Points Using Aggregated Expiration Ledgers Data Processing Engine definition processes Loyalty Aggregated Point Expiration Ledger records and expires points on the expiration date.

From Setup, in the Quick Find box, enter Loyalty Management, and then select **Loyalty Management**. Enable **Consolidate** member points for expiration. Make a copy of the template Data Processing Engine definitions. Activate, and then run the definitions based on the frequency at which you want to aggregate and expire fixed model, non-qualifying points.



SEE ALSO:

Salesforce Help: Enable Consolidation of Members' Fixed-Type, Non-Qualifying Points (Right-click to view in a new tab or window.)
Salesforce Help: Consolidate and Expire Fixed-Type, Non-Qualifying Points (Right-click to view in a new tab or window.)

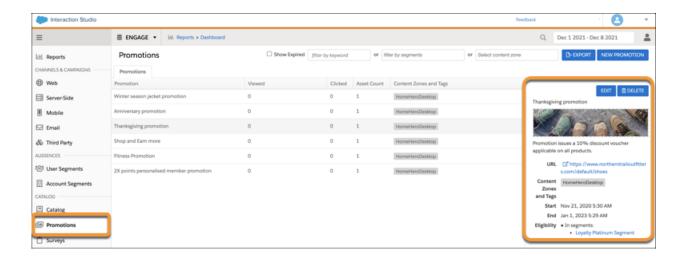
Target Members with Promotions in Real Time with Interaction Studio

Combine the power of Salesforce CDP and Interaction Studio to offer promotions in real time. Create personalized experiences for members by intelligently offering promotions in real time based on the Salesforce CDP segment.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management - Growth or Loyalty Management - Advanced, Salesforce CDP, and Interaction Studio in Marketing Cloud are enabled.

How: Connect Salesforce CDP with Interaction Studio. Create segments based on your Loyalty Management data in Salesforce CDP, and then publish them. Activate the segments, and then set the activation target as the Interaction Studio instance that you connected with the org.

To send your promotion data to Marketing Cloud, use Marketing Cloud Connect. And then send your promotion data to Interaction Studio.



SEE ALSO:

Salesforce Help: Offer Promotions in Real-Time with Interaction Studio (Right-click to view in a new tab or window.)

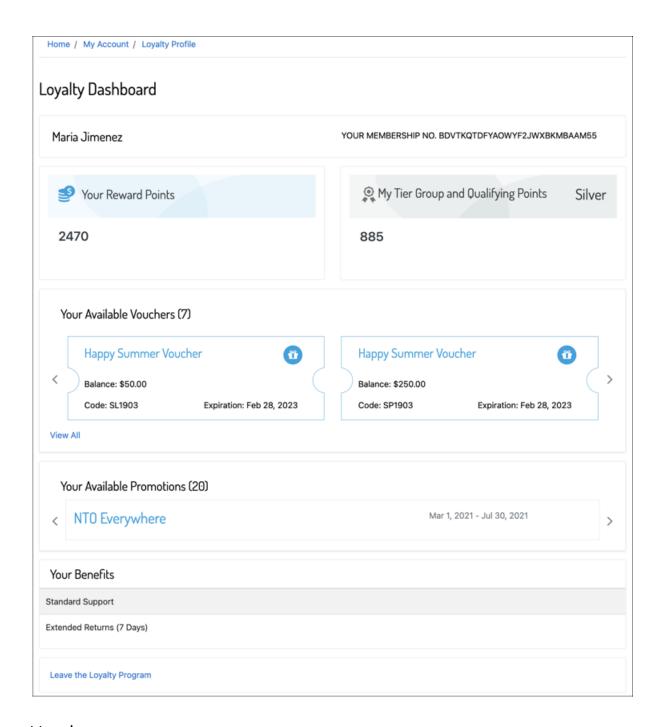
Run a Loyalty Program on B2C Commerce Site

Customers can join a loyalty program on your B2C Commerce site. Provide members information about their loyalty program membership. Let members accrue and redeem points for orders placed. Show members promotions that are available to them. Enable members to redeem their vouchers.

Where: This change applies to Lightning Experience in Enterprise edition where Loyalty Management, Salesforce Order Management, and Salesforce B2C Commerce are enabled.

Why: Salesforce provides a sample implementation of how you can integrate Loyalty Management with your B2C Commerce site.

How: Contact your Salesforce representative to request for an org that contains the reference implementation. Add the Loyalty Management for Commerce cartridge to your B2C Commerce site. Complete the post-installation setup in the org that we provide and in your B2C Commerce site.



Vouchers

Update existing voucher definitions to issue partially redeemable vouchers. Modify issued vouchers.

IN THIS SECTION:

Issue Multiple Use Vouchers Using Existing Voucher Definitions

Select Partially Redeemable in the existing voucher definitions so that vouchers that are issued using these definitions can be redeemed across multiple transactions.

Modify Issued Vouchers

Update the values of vouchers that have already been issued to members. For example, extend the expiration date of a voucher or change the value of a voucher.

Issue Multiple Use Vouchers Using Existing Voucher Definitions

Select Partially Redeemable in the existing voucher definitions so that vouchers that are issued using these definitions can be redeemed across multiple transactions.

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

Modify Issued Vouchers

Update the values of vouchers that have already been issued to members. For example, extend the expiration date of a voucher or change the value of a voucher.

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

How: Update these fields on the Voucher records as required:

- Benefit
- Discount Percentage
- Effective Date
- Expiration Date
- Face Value
- Promotion
- Reason
- Transaction Journal
- Use Date
- Voucher Code

Get a Loyalty Management License Based on Your Needs

Loyalty Management licenses now better match the scale of your loyalty programs. The new licenses are Loyalty Management - Starter, Loyalty Management - Growth, and Loyalty Management - Advanced. The licenses that were available until Winter '22 have been removed.

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

When: The new licenses are available from March, 2022. This change doesn't impact orgs that had the Loyalty Management licenses available until Winter '22.

How: For more information about the new licenses, contact your Salesforce representative.

Try Loyalty Management for Free

Get firsthand experience on the capabilities of Salesforce Loyalty Management for free! Sign up your admins, architects, and developers for an unconfigured Loyalty Management trial org. Create a customized loyalty program and try out the process automation tools, such as Data Processing Engine, Batch Management, and Decision Tables.

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

SEE ALSO:

External Link: Loyalty Management Trial Org (Right-click to view in a new tab or window.)

Other Changes in Loyalty Management

Learn about the other changes that we made to improve usability.

IN THIS SECTION:

Personalize Loyalty Ledgers

Loyalty Ledger is now available in Object Manager. Modify your users' page layout. The Loyalty Ledger fields are now available in the default page layout. Choose the fields that you want to keep in your page layouts.

Improve Security of Your Member Data with Shield Platform Encryption

Use Shield Platform Encryption to add another layer of protection for the names of your loyalty program members. Encrypt the Member Name field on the Loyalty Program Group Member Relationship object.

Personalize Loyalty Ledgers

Loyalty Ledger is now available in Object Manager. Modify your users' page layout. The Loyalty Ledger fields are now available in the default page layout. Choose the fields that you want to keep in your page layouts.

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

Improve Security of Your Member Data with Shield Platform Encryption

Use Shield Platform Encryption to add another layer of protection for the names of your loyalty program members. Encrypt the Member Name field on the Loyalty Program Group Member Relationship object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Loyalty Management and Shield Platform Encryption are enabled.

SEE ALSO:

Encrypt Your Loyalty Program Member Data (Right-click to view in a new tab or window.)

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Create a loyalty program process

Use the new LoyaltyProgramProcess object.

Create ledgers that aggregate fixed-tier, non-qualifying points based on member, currency, and expiration date Use the new LoyaltyAggrPointExprLedger object.

View when fixed-tier, non-qualifying points were last aggregated for a member

Use the new LastPointsAggregationDate field on the LoyaltyMemberCurrency object.

Enroll members using a wider list of channels

Use the new Franchise, Mobile, Partner, Print, and Store values in the EnrollmentChannel field of the LoyaltyProgramMember object.

Update vouchers that have been issued to members

Use the new Upsert call on the Voucher object to update the fields BenefitId, DiscountPercent, EffectiveDate, ExpirationDate, FaceValue, PromotionId, Reason, TransactionJournalId, UseDate, and VoucherCode.

REST API

Loyalty Management REST API includes enhanced calls.

Promotion Setup

Process transaction journals against a corresponding loyalty program process

Make a POST request to the new /connect/realtime/loyalty/programs/\${programName} resource.

New request body: Loyalty Engine Input Map

New response body: Loyalty Engine Realtime Output

Specify the value that a member has redeemed for a single use voucher

Make a POST request to the

 $\label{thm:logalty/programs/sprogramName}/members/\$\{membershipNumber\}/vouchers/\$\{voucherCode\}/redeem resource.$

Updated request body: Redeem Voucher Input

Vouchers

Specify the value a member has redeemed for a single use voucher

Make a POST request to the

 $/loyalty/programs/\$\{programName\}/members/\$\{membershipNumber\}/vouchers/\$\{voucherCode\}/redeem resource.$

Updated request body: Redeem Voucher Input

New Invocable Action in Loyalty Management

Use the new invocable action for Loyalty Management.

Run loyalty program processes for pending Accrual and Redemption type transaction journals

Use the new run ProgramProcessForTransactionJournal action.

New and Changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types of Loyalty Management.

Metadata Type

Create loyalty program processes

Use the new loyaltyProgramSetup metadata type.

Action Types

Run loyalty program processes for pending transaction journals

Use the new runProgramProcessForTransactionJournal value in the existing actionType field on the FlowActionCall subtype of the Flow metadata type.

Settings

Enable consolidation of fixed type, non-qualifying points for expiration

Use the new enableFixedTypeNQPAggregation field on the IndustriesLoyaltySettings metadata type.

Manufacturing Cloud

Display meaningful account forecasts with exactly the information your users need with measure groups in Advanced Account Forecasting. Manage your forecasts efficiently using the options to create custom fiscal years and generate weekly forecasts for your accounts. Collaborate with your partners on forecasts with the enhanced Manufacturing Cloud template in Experience Cloud. Generate weekly forecasts and more with the Data Processing Engine template enhancements.

IN THIS SECTION:

View Account Forecasts with Exactly the Information You Need

Create measure groups so that your users can view account forecasts with specific measures, such as quantity or revenue. You can create multiple measure groups for a forecast set. In the forecast grid, users see forecasts for measures that are part of the selected measure group.

Generate More Granular Forecasts

Your users can now generate weekly forecasts, in addition to monthly, quarterly, and yearly.

Include More Products and Schedules on Your Sales Agreements

Expand your sales agreements by adding up to 1500 products or product categories, and up to 72 schedules.

Boost Partner Collaboration on Forecasts

With the enhanced Manufacturing Experience Cloud site template, your customers and partners can view and update the forecast details for their accounts.

Simplify Forecast Calculations

Calculating forecasts when using a custom advanced account forecast fact object just got a whole lot easier. You can now create triggers with your data processing engine jobs to calculate your forecasts. You'll no longer need to use the CalculateAdvancedForecasts invocable action in a flow to perform forecast calculations.

Data Processing Engine Template Enhancements

The out-of-box Data Processing Engine templates now support weekly forecasts. And, to improve performance, the templates now sort records before inserting them in the advanced account forecast fact object.

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. This update was first made available in Winter 22

Develop Accurate Forecasts and Grow Your Business (Generally Available)

Gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Accounts' Health dashboard to monitor your accounts' performance based on key metrics for revenue and quantity, and take measures to improve your accounts' health. Use the Account Insights dashboard to track your accounts' performance based on various standard and custom dimensions, analyze the forecast composition, and identify accounts and products that need attention.

New Objects for Manufacturing Cloud

Do more with the new Manufacturing Cloud objects.

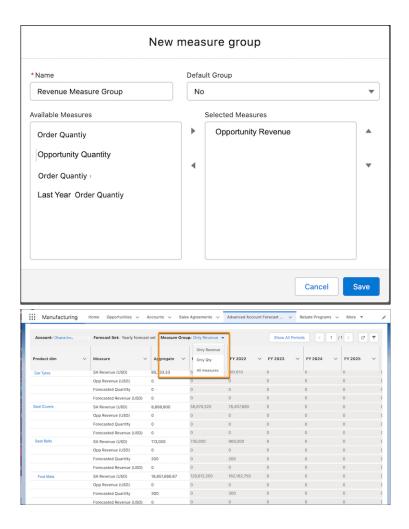
View Account Forecasts with Exactly the Information You Need

Create measure groups so that your users can view account forecasts with specific measures, such as quantity or revenue. You can create multiple measure groups for a forecast set. In the forecast grid, users see forecasts for measures that are part of the selected measure group.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To access this feature, users need the Advanced Account Forecast permission set.

How: From Setup, find and select **Advanced Account Forecasting**. On the Forecast Set tab, open Measure Groups, and then add measure groups with selected measures.



SEE ALSO:

Salesforce Help: Create Forecast Measure Groups (Right-click to view in a new tab or window.)

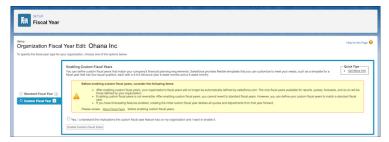
Generate More Granular Forecasts

Your users can now generate weekly forecasts, in addition to monthly, quarterly, and yearly.

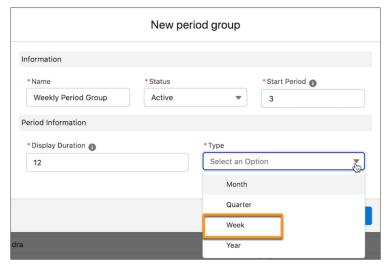
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To access this feature, users need the Advanced Account Forecast permission set.

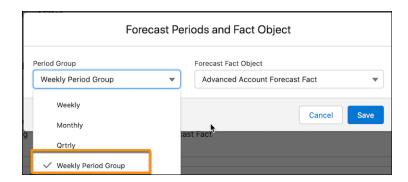
How: Before you configure weekly forecasts, you must enable custom fiscal years. From Setup, find and select **Fiscal Year** from Company Settings. Select **Custom Fiscal Years** to create custom fiscal years for your forecasts.



From Setup, find and select **Advanced Account Forecasting**. On the Period Groups tab, click **New** and add a period group of type Week.



To generate weekly forecasts for your accounts, select the Week period group when configuring the forecast set for those accounts.



SEE ALSO:

Salesforce Help: Create Custom Fiscal Years (Right-click to view in a new tab or window.) Salesforce Help: Create Forecast Sets (Right-click to view in a new tab or window.)

Include More Products and Schedules on Your Sales Agreements

Expand your sales agreements by adding up to 1500 products or product categories, and up to 72 schedules.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To access this feature, users need the Sales Agreements permission set.

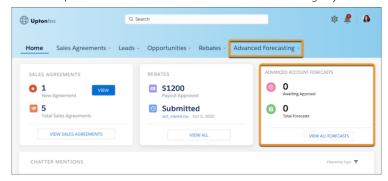
Boost Partner Collaboration on Forecasts

With the enhanced Manufacturing Experience Cloud site template, your customers and partners can view and update the forecast details for their accounts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled

Who: To access this feature, users need the Manufacturing Advanced Account Forecast for Experience Cloud permission set.

How: Give partners access to the advanced account forecasting objects.



SEE ALSO:

Salesforce Help: Improve Partner Collaboration with Experience Cloud (Right-click to view in a new tab or window.)

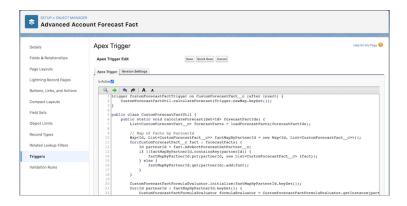
Simplify Forecast Calculations

Calculating forecasts when using a custom advanced account forecast fact object just got a whole lot easier. You can now create triggers with your data processing engine jobs to calculate your forecasts. You'll no longer need to use the CalculateAdvancedForecasts invocable action in a flow to perform forecast calculations.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To access this feature, users need the Manufacturing Advanced Account Forecast permission set.

How: From Setup, open Object Manager. Select and open your custom advanced account forecast fact object. Click **Triggers**, and then click **New**. Insert the code for a trigger to calculate the forecasted quantity and revenue based on your forecast formula. Schedule the forecasts generation using Data Processing Engine definitions in a custom flow.



SEE ALSO:

Salesforce Help: Create Triggers for Your Forecast Calculations (Right-click to view in a new tab or window.)

Data Processing Engine Template Enhancements

The out-of-box Data Processing Engine templates now support weekly forecasts. And, to improve performance, the templates now sort records before inserting them in the advanced account forecast fact object.

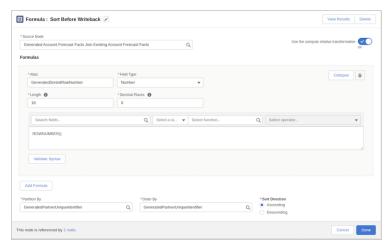
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To access this feature, users need the Manufacturing Advanced Account Forecast permission set.

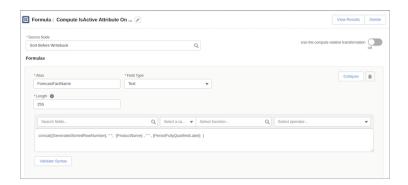
How: The formulas in these formula nodes in the out-of-the-box Data Processing Engine templates were updated to support weekly forecasts.

- Compute Account Forecast Set Partner Adjusted Dates
- Compute End Of Last Period And Sales Agreement Effective Date
- Compute Number of Applicable Days For SAPS Quantity Calculations
- Compute Today Date Day Period Offset For Account Forecast Set Partner
- Identify Valid Period Nodes For SAPS Start Date And End Date
- Compute Account Forecast Set Partner Date Offsets

The Data Processing Engine templates now include a new formula node called Sort Before Writeback. This node adds a row number to the generated advanced account forecast fact records.



The ForecastFactName attribute in the existing Compute IsActive Attribute On Account Forecast Fact node was also updated.



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. This update was first made available in Winter '22.

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 for Manufacturing Cloud for Service, see https://www.salesforce.com/products/manufacturing-cloud/pricing/.

SEE ALSO:

Salesforce Help: Use Manufacturing Cloud for Service

Develop Accurate Forecasts and Grow Your Business (Generally Available)

Gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Accounts' Health dashboard to monitor your accounts' performance based on key metrics for revenue and quantity, and take measures to improve your accounts' health. Use the Account Insights dashboard to track your accounts' performance based on various standard and custom dimensions, analyze the forecast composition, and identify accounts and products that need attention.

Where: This change applies to Tableau CRM in Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: To create an app from the Advanced Account Forecasting Analytics for Manufacturing template, you must have the Manufacturing Analytics Plus add-on license and Sales Agreements enabled in your org.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App | Advanced Account Forecasting Analytics for Manufacturing**. Follow the setup instructions to create your app.

SEE ALSO:

Salesforce Help: Enable Sales Agreements (Right-click to view in a new tab or window.)

New Objects for Manufacturing Cloud

Do more with the new Manufacturing Cloud objects.

Create measure groups with quantity or revenue measures to display forecasts for selected measures

Use the new AdvancedAccountForecastDisplayGroup and AdvancedAccountForecastDisplayGroupItem objects.

Consumer Goods Cloud

Use sales orgs to handle multiple markets more easily and org units to manage hierarchical territories and business areas. Now, sales reps can use the Consumer Goods Cloud offline mobile app to plan their day better, schedule visits, place orders, and calculate accurate order prices (pilot) even when they're offline. Sales reps can use folders and quick access cards to easily access the information that they require to do their jobs better.



Available in: Professional, Enterprise, Performance, and Developer editions

IN THIS SECTION:

Manage Multiple Markets with Sales Orgs

Manage multiple markets by creating multiple sales orgs in one Salesforce org. Configure each org differently, and seggregate data and business processes by sales org. For example, when you configure an org to handle direct orders, configure the other orgs such that the users in the other orgs are unable to create direct orders.

Retail Execution Planning

Use the tools in Consumer Goods cloud to efficiently define and plan visits. Use tactics, hurdles, and rewards to plan impactful promotions. Use order disposal lists and order templates to better manage how sales reps place orders using the Consumer Goods Offline mobile app.

Offline Visit Planning and Execution

The Consumer Goods Cloud offline mobile app has new capabilities that help sales reps plan their day better, schedule visits, place orders, and calculate order prices. Sales reps can also personalize the app. With sales folders and quick access cards, reps now have easy access to information that they can use to run promotions better and increase revenue.

Advanced Customer and Product Data Management

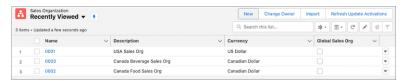
Define and maintain a customer's relationships with their wholesaler and bill-to, ship-to, and pay-to parties. Define multiple units of measure for a product and different logistical information for each unit for faster and efficient order processing. Use org units to manage different business areas. Use org unit hierarchies to easily group and manage org units based on geographic territories.

Manage Multiple Markets with Sales Orgs

Manage multiple markets by creating multiple sales orgs in one Salesforce org. Configure each org differently, and seggregate data and business processes by sales org. For example, when you configure an org to handle direct orders, configure the other orgs such that the users in the other orgs are unable to create direct orders.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: From the App Launcher, find and select Sales Org.



Retail Execution Planning

Use the tools in Consumer Goods cloud to efficiently define and plan visits. Use tactics, hurdles, and rewards to plan impactful promotions. Use order disposal lists and order templates to better manage how sales reps place orders using the Consumer Goods Offline mobile app.

IN THIS SECTION:

Create Effective Visits with Visit Templates and Trip Lists

Use visit templates to control the behavior of business processes in visits. For example, activate GPS tracking in a visit template to record the location of a visit. Use a predefined trip list for a sales rep to create multiple visits for the rep in a click. Create visits that aren't customer-related. For example, create private appointments or vacations for your reps.

Create Impactful Promotions with Tactics, Rewards, and Sales Folder

Define tactics to add strategic actions to your promotions to achieve specific targets. Associate rewards with promotions, and add hurdles to define the eligibility criteria for those rewards. Sales managers can use promotion and tactic templates to create promotions and tactics quickly. Managers can also set up a sales folder and add it to promotions to give sales reps access to useful resources for sales and promotions.

Manage Product Assortments Better with Listing Modules

Use listing modules to include a product in multiple modules and cater to the different assortment needs of a customer with just one assortment. Define multiple target prices and facings for a product within the same product assortment and edit the details of multiple products at one go. In a product assortment template, use record types to create different types of product assortments.

Manage Orders Better with Order Templates and Disposal Lists

Create order templates to help your sales reps quickly create different types of orders such as direct and indirect orders. Use order templates to manage different types of items that can be included in an order, such as standard, samples, empty products, and product returns. Assign an order template to a product assortment to add the products only from that assortment to an order disposal list. With relevant products in an order disposal list, sales reps spend less time and effort finding products when placing an order.

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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: Set up advanced pricing (pilot) before you use rewards and hurdles.

Manage Product Assortments Better with Listing Modules

Use listing modules to include a product in multiple modules and cater to the different assortment needs of a customer with just one assortment. Define multiple target prices and facings for a product within the same product assortment and edit the details of multiple products at one go. In a product assortment template, use record types to create different types of product assortments.

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 product assortment record page, in the Listing Module related list, click **New**.

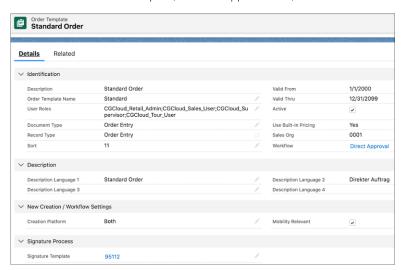


Manage Orders Better with Order Templates and Disposal Lists

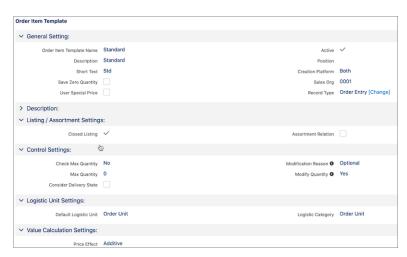
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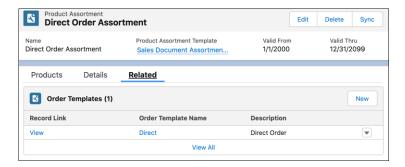
How: To create an order template, from the App Launcher, find and select Order Templates.



To create an order item template, from the App Launcher, find and select **Order Item Templates**.



To assign a product assortment to an order template, from the Order Template related list in the product assortment record page, click **New**.



Offline Visit Planning and Execution

The Consumer Goods Cloud offline mobile app has new capabilities that help sales reps plan their day better, schedule visits, place orders, and calculate order prices. Sales reps can also personalize the app. With sales folders and quick access cards, reps now have easy access to information that they can use to run promotions better and increase revenue.



Note: Translated user interface labels in localized versions of the Consumer Goods offline mobile app are currently in Beta release status.

IN THIS SECTION:

Handle Orders Efficiently Even When Offline

Sales reps can now place orders even when they're offline by using the Consumer Goods offline mobile app. Sales reps can also create fast orders, copy an existing order, and scan products to add to the order. Sales reps can place promotion-based orders to increase sales. With easy access to order suggestions, sales reps can improve their sales pitch. They can print order confirmations or share them as PDFs.

Get Accurate Order Prices Offline with Advanced Pricing Setup (Pilot)

Use pricing condition templates and calculation schemas to configure advanced pricing in your org. With advanced pricing, your sales reps can calculate accurate prices for orders even when they're offline. They can calculate orders that have different scales, different units of measure, and conditions such as discounts, amount per unit, and flat rates.

Schedule Visits on the Go with the Offline Mobile App

Create visits automatically based on the parameters defined in customer visit settings. Or, create visits based on predefined trip lists. You can always create a visit manually by entering the details yourself. Locate nearby customers in a map, filter them based on promotions or distance, and create visits if necessary. Block your calendar with visits that aren't related to customers, such as doctor's appointments or vacations.

Make Sales Reps Pitch Ready with Sales Folder

Set up a sales folder to equip your sales reps with resources for making stronger sales pitches. You can add multimedia resources such as images, documents, and videos to the sales folder. Use sell sheets to add different groups of attachments to a sales folder. For example, for a regional celebrations sales folder, add two sell sheets, one with attachment links for Halloween and the other with attachment links for Christmas.

Enjoy Quick Access to Third-Party Apps with Quick Access Cards

With quick access cards, sales reps can quickly launch third-party apps from within the Consumer Goods offline mobile app. You can configure separate sets of quick access cards for user and store cockpits.

View Tableau CRM Dashboards with Analytics Cards

Sales reps can now access reports and dashboards from within the Consumer Goods offline mobile app by using analytics cards. You can configure separate analytics cards for user and store cockpits.

Personalize Your Offline Mobile App

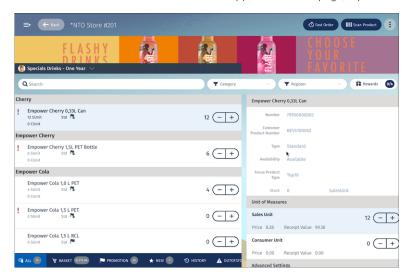
Sales reps can customize the Consumer Goods Offline mobile app. For example, when logging in to the app, sales reps can choose to land in the user cockpit or the main menu. They can choose a weekly or daily layout for their calendar, hide or show weekends, and set the start time of the day. They can also choose to hide or view route and traffic by using the map settings.

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Sales reps can now place orders even when they're offline by using the Consumer Goods offline mobile app. Sales reps can also create fast orders, copy an existing order, and scan products to add to the order. Sales reps can place promotion-based orders to increase sales. With easy access to order suggestions, sales reps can improve their sales pitch. They can print order confirmations or share them as PDFs.

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 Consumer Goods offline mobile app, on the Order page, tap **Take New Order**.



Get Accurate Order Prices Offline with Advanced Pricing Setup (Pilot)

Use pricing condition templates and calculation schemas to configure advanced pricing in your org. With advanced pricing, your sales reps can calculate accurate prices for orders even when they're offline. They can calculate orders that have different scales, different units of measure, and conditions such as discounts, amount per unit, and flat rates.

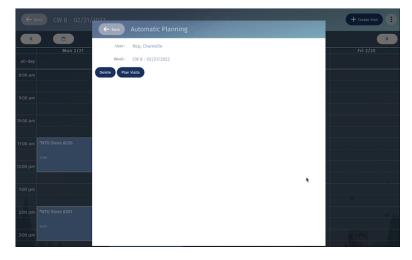
Where: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never 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.

Schedule Visits on the Go with the Offline Mobile App

Create visits automatically based on the parameters defined in customer visit settings. Or, create visits based on predefined trip lists. You can always create a visit manually by entering the details yourself. Locate nearby customers in a map, filter them based on promotions or distance, and create visits if necessary. Block your calendar with visits that aren't related to customers, such as doctor's appointments or vacations.

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 automatically create a visit, in the weekly calendar view, tap **Automatic Planning**. To create visits based on trip lists, tap **Create Visits via Triplists**, and then drag a trip list to the calendar. To create a visit manually, tap **Add new Visit**.



Make Sales Reps Pitch Ready with Sales Folder

Set up a sales folder to equip your sales reps with resources for making stronger sales pitches. You can add multimedia resources such as images, documents, and videos to the sales folder. Use sell sheets to add different groups of attachments to a sales folder. For example, for a regional celebrations sales folder, add two sell sheets, one with attachment links for Halloween and the other with attachment links for Christmas.

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 access the sales folder, from the main menu in the Consumer Goods offline mobile app, tap **Sales Folder**.

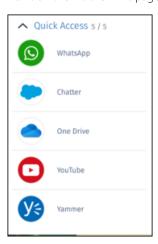


Enjoy Quick Access to Third-Party Apps with Quick Access Cards

With quick access cards, sales reps can quickly launch third-party apps from within the Consumer Goods offline mobile app. You can configure separate sets of quick access cards for user and store cockpits.

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 the Mobile Links page, click **New**, and then select **Quick Access** as the record type.

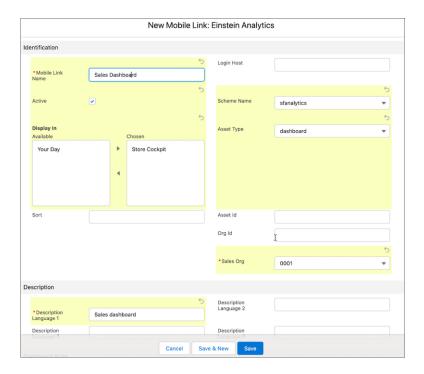


View Tableau CRM Dashboards with Analytics Cards

Sales reps can now access reports and dashboards from within the Consumer Goods offline mobile app by using analytics cards. You can configure separate analytics cards for user and store cockpits.

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 the Mobile Links page, click **New**, and then select **Einstein Analytics** as the record type.



Personalize Your Offline Mobile App

Sales reps can customize the Consumer Goods Offline mobile app. For example, when logging in to the app, sales reps can choose to land in the user cockpit or the main menu. They can choose a weekly or daily layout for their calendar, hide or show weekends, and set the start time of the day. They can also choose to hide or view route and traffic by using the map settings.

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.

Advanced Customer and Product Data Management

Define and maintain a customer's relationships with their wholesaler and bill-to, ship-to, and pay-to parties. Define multiple units of measure for a product and different logistical information for each unit for faster and efficient order processing. Use org units to manage different business areas. Use org unit hierarchies to easily group and manage org units based on geographic territories.

IN THIS SECTION:

Manage Customer Data Easily

With the new capabilities, you can now define customer hierarchies, customer relationships, and wholesalers. You can also define and maintain a customer's relationships with wholesalers and bill-to, ship-to, and pay-to parties. With partner roles clearly defined, every partner knows their responsibilities in a business process. You can assign customer hierarchies to org units and stores, and maintain validity periods of the assignments.

Handle Products Efficiently by Defining Product Hierarchies and UoMs

When creating a product part, you can define the parent and child products and a validity period for the resulting product hierarchy. You can define multiple units of measure (UoMs) for a product and define different logistical information for each unit for faster and efficient order processing.

Manage Territories with Org Unit Hierarchies

Create different orgunits and set up orgunit hierarchies to handle different types of logical units, such as territories. Assign different user types, such as sales and merchandisers, to orgunits. If you want to realign your orgunits in the future, define a validity period for the orgunit hierarchy. When you assign users and customers to an orgunit, the users are automatically assigned to the customers.

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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 add a customer relationship, from a customer page, in the Customer Realationships related list, click **New**.



Handle Products Efficiently by Defining Product Hierarchies and UoMs

When creating a product part, you can define the parent and child products and a validity period for the resulting product hierarchy. You can define multiple units of measure (UoMs) for a product and define different logistical information for each unit for faster and efficient order processing.

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 a product page, in the Unit of Measure related list, click **New**.

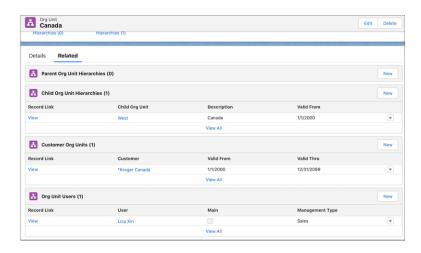


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Create different org units and set up org unit hierarchies to handle different types of logical units, such as territories. Assign different user types, such as sales and merchandisers, to org units. If you want to realign your org units in the future, define a validity period for the org unit hierarchy. When you assign users and customers to an org unit, the users are automatically assigned to the customers.

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 an org unit record, in the Customer Org Unit related list, click **New**.



Public Sector Solutions

Automate decisions and calculations by using the Business Rules Engine. Provide clear reasons for application approvals, rejections, and benefit calculations with Decision Explainer. And store your applications' actions efficiently by using new Public Sector tooling API objects.

IN THIS SECTION:

Automate Decision Processes by Using Business Rules Engine (Generally Available)

Automate complex policy decisions and eligibility calculations for programs, such as unemployment insurance, small business loans, and business license applications. Using OmniStudio, build, test, and run rules. Perform calculations and enable better decision-making in your applications by using Business Rules Engine services, components, and objects.

Help Constituents and Auditors to Make Better Decisions

Use Decision Explainer to get insights and reasons for why a rule generated a specific result. For example, when an unemployment benefit application is rejected, both your users and your constituents can see the reason for the rejection.

Manage Licenses, Permits, and Inspections Effectively with Data-Driven Insights

Get intelligent insights to effectively manage your agency and departments, and increase constituent satisfaction. Track a department's performance, identify applications and inspections that need attention, and improve workflow efficiency. Get immediate insights into an account's applications, licenses, complaints, inspections, and violations from an account record page.

Public Sector Solutions Has New Tooling API Objects

Use Tooling APIs to work with the Public Sector setup objects.

REST API

Decision Explainer REST API includes enhanced calls.

Automate Decision Processes by Using Business Rules Engine (Generally Available)

Automate complex policy decisions and eligibility calculations for programs, such as unemployment insurance, small business loans, and business license applications. Using OmniStudio, build, test, and run rules. Perform calculations and enable better decision-making in your applications by using Business Rules Engine services, components, and objects.

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

Who: To use Business Rules Engine, users need the Rules Engine Designer and Rules Engine Runtime permission sets. To access OmniStudio-specific entities, users need the OmniStudio Admin and OmniStudio User permission sets.

SEE ALSO:

Salesforce Help: Business Rules Engine (Right-click to view in a new tab or window.)

Help Constituents and Auditors to Make Better Decisions

Use Decision Explainer to get insights and reasons for why a rule generated a specific result. For example, when an unemployment benefit application is rejected, both your users and your constituents can see the reason for the rejection.

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SEE ALSO:

Salesforce Help: Decision Explainer (Right-click to view in a new tab or window.)

Manage Licenses, Permits, and Inspections Effectively with Data-Driven Insights

Get intelligent insights to effectively manage your agency and departments, and increase constituent satisfaction. Track a department's performance, identify applications and inspections that need attention, and improve workflow efficiency. Get immediate insights into an account's applications, licenses, complaints, inspections, and violations from an account record page.

Where: This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Who: To create an app from the Analytics for Licenses, Permits, and Inspections template, you need the TCRM for Public Sector add-on license.

How: From Tableau CRM Analytics Studio, click **Create**, and then select **App | Analytics for Licenses, Permits, and Inspections**. Follow the setup instructions to create your app.

Public Sector Solutions Has New Tooling API Objects

Use Tooling APIs to work with the Public Sector setup objects.

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

Store information about the action log generated by the associated application's action

Use the new ExplainabilityActionDef object.

Indicate the version of the action log generated by the associated application's action

Use the new ExplainabilityActionVersion object.

Define the type of business process run within an application

Use the new BusinessProcessTypeDef object.

Define the subtype of an application within an application domain

Use the new ApplicationSubtypeDefinition object.

REST API

Decision Explainer REST API includes enhanced calls.

Decision Explainer

Retrieve a paginated list of explainability action logs

Make a GET request to the new /connect/decision-explainer/action-logs resource.

New query parameters: actionContextCode, applicationSubType, applicationType, createdAfter, createdBefore, pageSize, processType, and queryMore

New response body: Explainability Action Logs

Create an explainability action log

Make a POST request to the new /connect/decision-explainer/action-logs resource.

New request body: Explainability Action Log Input

New response body: Explainability Action Log Create

Industries: Common Components

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, Data Processing Engine gives you more detailed definitions and more calculating power. Action plans get more flexibility and control. You can delete unneeded Batch Management job runs, and invoke more decision tables. Einstein Relationship Insights adds relationship recommendations and Gmail support, while Intelligent Form Reader adds support for special characters. Rebate Management offers more summary information and streamlined claims.

IN THIS SECTION:

Data Processing Engine

Change your Data Processing Engine definitions with ease. Use the Sum function in a formula to calculate the sum of the values that are stored in a field across the rows of a partition. Delete Data Processing Engine definition runs that you no longer require.

Batch Management

Delete Batch Management job runs that have been either completed or canceled.

Action Plans

Capture more details for tasks. Use the enhanced printable view to collaborate better on action plan items. Share or transfer the ownership of action plans and action plan templates. Filter the action templates list by status. Delete action plan templates whose status is Obsolete and that don't contain any related action plans.

Decision Table

You can invoke decision tables up to 430,000 times per hour.

Einstein Relationship Insights

Explore more company and person records by choosing to get notified of relationship recommendations. Expand your scope of discovering insights by using Gmail as a content source.

Intelligent Form Reader

Extract individual fields from a Compound form field and map them in a template. After extraction, process the special characters in a form field to ensure that all form fields are mapped in a template.

Interest Tagging

Tags are words or short phrases that users can associate with Salesforce records to capture customer needs, interests, and opportunities.

Rebate Management

Get instant and detailed information about the projected rebates or incentives for an account. View information about the aggregated rebates down to the transaction level details. Easily submit rebate claims for ship and debit programs. Process rebate payments using the new and improved orchestration flow.

Record Alerts

The Record Alerts feature allows you to store and retrieve record alerts, and set up categorization of record alerts on the objects records.

Data Processing Engine

Change your Data Processing Engine definitions with ease. Use the Sum function in a formula to calculate the sum of the values that are stored in a field across the rows of a partition. Delete Data Processing Engine definition runs that you no longer require.

IN THIS SECTION:

Update Data Processing Engine Definitions with Ease

When you update source object nodes or remove fields in a definition, you're notified about the dependent nodes where the objects and fields are referenced. You can navigate along the reference path for each dependent node, and then remove the required references. Previously, you had to manually look through each node to find and remove a reference.

Delete Previous Runs

Increase the available space in your Salesforce org by deleting the completed and canceled definition runs. When you delete a run, the associated tasks are also deleted.

Find the Sum of a Field

Use the new Sum function in a formula to calculate the sum of the values that are stored in a field across all rows of a partition. You can store the sum in a Number type field.

Changed Object in Data Processing Engine

Make the most of the changed Data Processing Engine object.

Changed Tooling API Objects in Data Processing Engine

Use Tooling APIs to work with the Data Processing Engine setup objects.

Changed Data Processing Engine Metadata Type

Make the most of the changed metadata types of Data Processing Engine.

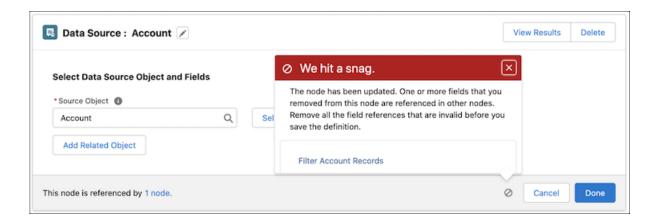
Changed Objects in Monitor Workflow Services

Delete Data Processing Engine definition runs and their associated records.

Update Data Processing Engine Definitions with Ease

When you update source object nodes or remove fields in a definition, you're notified about the dependent nodes where the objects and fields are referenced. You can navigate along the reference path for each dependent node, and then remove the required references. Previously, you had to manually look through each node to find and remove a reference.

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 Salesforce.



SEE ALSO:

Salesforce Help: Why Does a Node Indicate That Removed Fields Are Referenced in a Node after the References Are Removed? (Right-click to view in a new tab or window.)

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Increase the available space in your Salesforce org by deleting the completed and canceled definition runs. When you delete a run, the associated tasks are also deleted.

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 Salesforce.

How: In Setup, search for and select **Monitor Workflow Services**. Click next to the run that you want to delete. Click **Delete** > **Delete**

SEE ALSO:

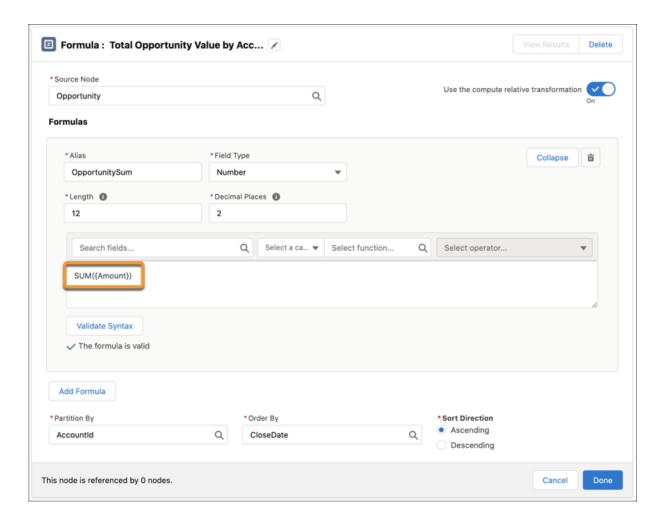
Salesforce Help: Delete a Run (Right-click to view in a new tab or window.)

Find the Sum of a Field

Use the new Sum function in a formula to calculate the sum of the values that are stored in a field across all rows of a partition. You can store the sum 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 Salesforce.

How: In a Data Processing Engine definition, click **New Node**. Select the node type as **Formula**. Select the source node that contains the field for which you want to calculate the sum. Turn on **Use the compute relative transformation**. In the Formulas section, provide an alias for the field that stores the sum, and then select **Number** as the field type. Select the **Sum** function, place the cursor within the parenthesis, and then select the field for which you want to calculate the sum. For example, to calculate the sum of amount, use SUM({Amount}).



SEE ALSO:

Salesforce Help: Compute Relative Transformation (Right-click to view in a new tab or window.)

Changed Object in Data Processing Engine

Make the most of the changed Data Processing Engine object.

View template definitions provided with the new process type

Use the new LoyaltyPointsAggregation value in the ProcessType field of the BatchCalcJobDefinitionView object.

Changed Tooling API Objects in Data Processing Engine

Use Tooling APIs to work with the Data Processing Engine setup objects.

Update the provided template definitions or create definitions with the new process type

Use the new LoyaltyPointsAggregation value in the ProcessType field of the BatchCalcJobDefinition object.

Changed Data Processing Engine Metadata Type

Make the most of the changed metadata types of Data Processing Engine.

Create new or update existing template definitions with the new process type

Use the new LoyaltyPointsAggregation and NetZero values in the existing processType field on the BatchCalcJobDefinition metadata type.

Changed Objects in Monitor Workflow Services

Delete Data Processing Engine definition runs and their associated records.

Delete Data Processing Engine definition runs and their associated parts and failed records

Use the newly supported Delete and Undelete calls on the BatchJob object.

Batch Management

Delete Batch Management job runs that have been either completed or canceled.

IN THIS SECTION:

Remove Batch Job Runs

Optimize the space that's available in your org by deleting batch job runs that are completed or have been canceled. When you delete a batch job run, the associated batch job parts and failed records are also deleted.

Changed Objects in Monitor Workflow Services

Delete batch job runs and their associated records.

Remove Batch Job Runs

Optimize the space that's available in your org by deleting batch job runs that are completed or have been canceled. When you delete a batch job run, the associated batch job parts and failed records are also deleted.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

How: In Setup, search for and select **Monitor Workflow Services**. Click next to the batch job run that you want to delete. Click **Delete** > **Delete**.

SEE ALSO:

Salesforce Help: Delete a Batch Job Run (Right-click to view in a new tab or window.)

Changed Objects in Monitor Workflow Services

Delete batch job runs and their associated records.

Delete batch jobs and their associated parts and failed records

Use the newly supported Delete and Undelete calls on the BatchJob object.

Action Plans

Capture more details for tasks. Use the enhanced printable view to collaborate better on action plan items. Share or transfer the ownership of action plans and action plan templates. Filter the action templates list by status. Delete action plan templates whose status is Obsolete and that don't contain any related action plans.

IN THIS SECTION:

Include More Fields in Action Plan Template Tasks

When creating new tasks for action plan templates, you now can include up to eight more standard and custom fields. Previously, only a few standard fields were allowed, such as subject, priority, days, and comments. To add new fields, you created tasks for action plans first.

Customize Fields in the Action Plans Printable View

You can now customize the list of fields that's shown in the printable view for action plans. Tailor the information about tasks and document checklist items for users who are working in a print-friendly format.

Share Action Plans and Action Plan Templates More Easily

Manual sharing of action plans and action plan templates is now available in a new streamlined interface in Lightning Experience. Previously, we supported manual sharing only for action plans, and you had to switch to Salesforce Classic to share action plan templates with specific users and user groups.

Change Owners of Action Plan Templates and Action Plans

You can now change the ownership of published and draft versions of action plan templates and action plans to another user.

Filter Action Plan Templates by Status

Previously, to check the status of an action plan template, users opened each one individually. Now, they can filter the action plan templates list view by status.

Clean Up the Action Plan Templates List

Deleting action plan templates is no longer limited to draft templates. You can now delete templates if their status is Obsolete and they don't contain any related action plans.

Include More Fields in Action Plan Template Tasks

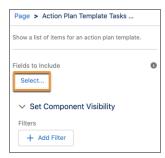
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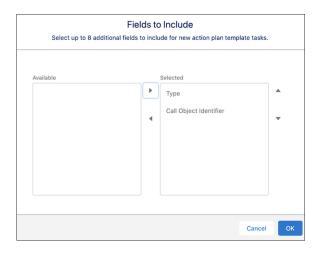
Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: Edit the Action Plan Template record page, and then select the Task component. In the Properties pane, under Fields to Include, click **Select**. Move the desired fields to the Selected list, and reorder them as needed.



Note: Ensure that the data types of the new fields are either picklist, checkbox, or text field. If ad hoc creation of tasks is enabled, then for ad hoc tasks, create a task and edit it again to view the new fields.





SEE ALSO:

Salesforce Help: Include More Fields in Action Plan Template Tasks

Customize Fields in the Action Plans Printable View

You can now customize the list of fields that's shown in the printable view for action plans. Tailor the information about tasks and document checklist items for users who are working in a print-friendly format.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: To edit the printable view fields, in Object Manager, go to the Action Plan page layout and make sure that it includes the Tasks and Document Checklist Items related lists. Then edit the fields in those related lists.

SEE ALSO:

Salesforce Help: Show Action Plan Items in the Printable View

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Manual sharing of action plans and action plan templates is now available in a new streamlined interface in Lightning Experience. Previously, we supported manual sharing only for action plans, and you had to switch to Salesforce Classic to share action plan templates with specific users and user groups.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: This change is available only for Salesforce admins and owners of action plan template records.

How: For the record that you want to share, click **Sharing**. Manually add any users who aren't included in sharing rules and share any related records.

SEE ALSO:

Salesforce Help: Considerations for Creating Action Plan Templates Salesforce Help: Considerations for Creating Action Plans

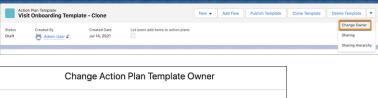
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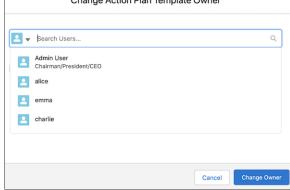
You can now change the ownership of published and draft versions of action plan templates and action plans to another user.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: This change is available only for Salesforce admins and owners of action plan template records.

How: On the Action Plan Template or Action Plan record page, from the page-level action menu, click **Change Owner**. Then select the new owner.







Note: Changing the ownership of action plans doesn't automatically change the ownership of related tasks. The Action Plan component shows only the tasks that the user has access to. Remind users to manually change all task owners.

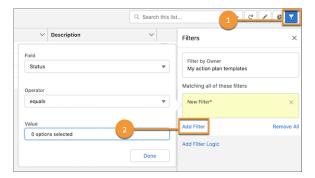
SEE ALSO:

Salesforce Help: Considerations for Creating Action Plan Templates
Salesforce Help: Considerations for Creating Action Plans

Filter Action Plan Templates by Status

Previously, to check the status of an action plan template, users opened each one individually. Now, they can filter the action plan templates list view by status.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.



How: In the Action Plan Templates list view, click the filter icon (1). Add a filter condition (2), and then set the Status field to the desired value. Click **Done**. Click **Apply**.

From the List View Controls menu, click **Select Fields to Display**. For the Action Plan Templates list view, select **Status** as a visible field.

The default status values are Draft, Obsolete, and Published. If your org has action plans migrated from another org, then those migrated action plan templates show a ReadOnly status.

SEE ALSO:

Salesforce Help: Filter Action Plan Templates by Status

Clean Up the Action Plan Templates List

Deleting action plan templates is no longer limited to draft templates. You can now delete templates if their status is Obsolete and they don't contain any related action plans.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: On the Action Plan Templates page, click Delete Template.

Decision Table

You can invoke decision tables up to 430,000 times per hour.

IN THIS SECTION:

Increase Outcomes Every Hour

Invoke decision tables in your org more frequently. Decision tables that evaluate fewer than 10,000 business rules can cumulatively provide up to 400,000 outcomes per hour. Decision tables that evaluate more than 10,000 business rules can cumulatively provide up to 30,000 outcomes per hour.

Increase Outcomes Every Hour

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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

SEE ALSO:

Salesforce Help: How Many Times Can I Invoke Decision Tables? (Right-click to view in a new tab or window.)
Salesforce Help: Decision Table Limits (Right-click to view in a new tab or window.)

Einstein Relationship Insights

Explore more company and person records by choosing to get notified of relationship recommendations. Expand your scope of discovering insights by using Gmail as a content source.

IN THIS SECTION:

Get Notified of Relationship Recommendations

Sales reps can opt to get notified of relationship recommendations when exploring a person or company record. Sales reps can focus on exploring additional people and companies instead of waiting for Einstein to show relationship recommendations. Einstein can either notify sales reps for all the records that they explore or ask permission to notify each time they explore a record.

Get Relationship Recommendations from Gmail

Expand the scope of your relationship recommendations by including Gmail as a content source. Einstein Relationship Insights explores Gmail 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.

Get Notified of Relationship Recommendations

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Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Einstein Relationship Insights.

How: From the Einstein Relationship Insights component settings page, under Notification Settings, select when Einstein can send you notifications for relationship recommendations.

SEE ALSO:

Salesforce Help: Get Notified of Relationship Recommendations (Right-click to view in a new tab or window.)

Get Relationship Recommendations from Gmail

Expand the scope of your relationship recommendations by including Gmail as a content source. Einstein Relationship Insights explores Gmail 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.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Einstein Relationship Insights.

How: From Setup, in the Quick Find box, enter *Einstein*, and then select **Einstein Relationship Intelligence**. In the Content Sources section, select **Gmail** as the content source.

SEE ALSO:

Salesforce Help: Connect and Disconnect a Content Source (Right-click to view in a new tab or window.)

Intelligent Form Reader

Extract individual fields from a Compound form field and map them in a template. After extraction, process the special characters in a form field to ensure that all form fields are mapped in a template.

IN THIS SECTION:

Enhance Form Field Mapping

Map the extracted form fields to individual fields within the Compound field. For example, extract the first name and last name from the Contact compound field and map them to the FirstName and LastName in the Contact object. Or, extract city or postal code from the Address compound field and map them to the Address object.

Accurately Extract Field Names

After extraction, Intelligent Form Reader performs additional processing to trim the special characters contained in a form field. This ensures that the fields with special characters are also mapped when creating a template. For example, if a field is marked as required by using '*', such as FirstName*, Intelligent Form Reader processes only the field name.

SEE ALSO:

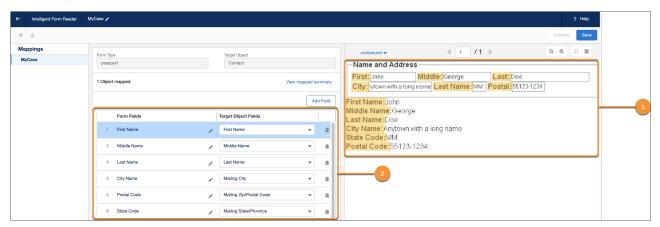
Einstein Release Notes

Enhance Form Field Mapping

Map the extracted form fields to individual fields within the Compound field. For example, extract the first name and last name from the Contact compound field and map them to the FirstName and LastName in the Contact object. Or, extract city or postal code from the Address compound field and map them to the Address object.

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, such as Financial Services, Health, and Public Sector clouds.

How: From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Click **New Mapping**. Define the mapping name and the unique API name. Select a form type and upload the sample form. In Target Object, select an object to map the form fields to.



Click the extracted form thumbnail for a full view of the form (1). The auto-extracted keys appear in the Form Fields column. In the Target Object Fields column, select the fields that you want to map the form fields to (2).

SEE ALSO:

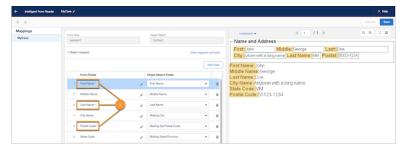
Set Up Data Extraction

Accurately Extract Field Names

After extraction, Intelligent Form Reader performs additional processing to trim the special characters contained in a form field. This ensures that the fields with special characters are also mapped when creating a template. For example, if a field is marked as required by using '*', such as FirstName*, Intelligent Form Reader processes only the field name.

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, such as Financial Services, Health, and Public Sector clouds.

How: From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Click **New Mapping.** Define the mapping name and the unique API name. Select a form type and upload the sample form. In Target Object, select an object to map the form fields to.



Click the extracted form thumbnail. The auto-extracted keys appear in the Form Fields column (1) with special characters. After the form is processed, confirm that no special characters are extracted.

SEE ALSO:

Set Up Data Extraction

Interest Tagging

Tags are words or short phrases that users can associate with Salesforce records to capture customer needs, interests, and opportunities.

IN THIS SECTION:

Connect REST API

Interest Tagging REST API includes new calls.

Connect REST API

Interest Tagging REST API includes new calls.

Interest Tagging

Create an Interest Tag

Make a POST request to the new /connect/interest-tags/tags resource.

New Request body: Interest Tag Create Input

New response body: Interest Tag Create Collection Output

Create assignments for Interest Tags and a Salesforce object record

Make a POST request to the new /connect/interest-tags/assignments resource.

New Request body: Interest Tag Assignment Input

New response body: Interest Tag Assignment Output

Delete Interest Tags by a list of tag IDs

Make a DELETE request to the new /connect/interest-tags/tags resource.

Required request parameter: tagIds

Retrieve a list of Interest Tags by a category ID

Make a GET request to the new /connect/interest-tags/tags resource.

Required request parameter: categoryId

New response body: Interest Tag List

Retrieve a list of categories assigned to an Interest Tag

Make a GET request to the new /connect/interest-tags/categories resource.

Required request parameter: tagId New response body: Tag Category List

Retrieve a list of Interest Tags assigned to a Salesforce object record

Make a GET request to the new /connect/interest-tags/assignments/entity/\${recordId} resource.

New response body: Interest Tag List

Retrieve a list of assignments by an Interest Tag ID

Make a GET request to the new /connect/interest-tags/assignments/tag/\${tagId} resource.

New response body: Tag Record Assignment Collection

Update an Interest Tag

 $\label{lem:make_a_PATCH} \textit{Make a PATCH request to the new /connect/interest-tags/tags/\$\{tagId\}\ \textit{resource}.$

New Request body: Interest Tag Update Input

New response body: Interest Tag Update Output

Rebate Management

Get instant and detailed information about the projected rebates or incentives for an account. View information about the aggregated rebates down to the transaction level details. Easily submit rebate claims for ship and debit programs. Process rebate payments using the new and improved orchestration flow.

IN THIS SECTION:

Visualize Progress Against Rebates with Ease

Foster meaningful conversations between your sales reps or partners and customers by providing access to detailed information about incentives or rebates, directly on a record. The Program Rebate Types panel shows projected rebates or incentives, current progress against a rebate type, the amount required to reach the next tier, and the total projected rebate amount for the current year.

View Detailed Information About Aggregate Rebate Transactions

Use the new Aggregate by Member with Aggregate Item Details Data Processing Engine template to ensure that you know exactly which transactions were included in an aggregated rebate or payout.

Automate Rebate Calculations with a New Rebate Orchestration Flow

Use the newer, simpler, better-performing, and similarly configurable Rebate Orchestration Flow 2. The flow includes a Run Rebate Payout Calculations 2 subflow that calls a new Calculate Rebate Payouts for All Periods batch job to determine the payout periods used to process rebate payouts. In addition, the subflow calls a new Rebate Calculations Post Processing job that leverages the data processing engine to update the status of payout periods.

New Objects for Rebate Management

Do more with these new Rebate Management objects.

New Invocable Actions in Rebate Management

Use the new invocable actions for Rebate Management.

New Action Type Value in Rebate Management

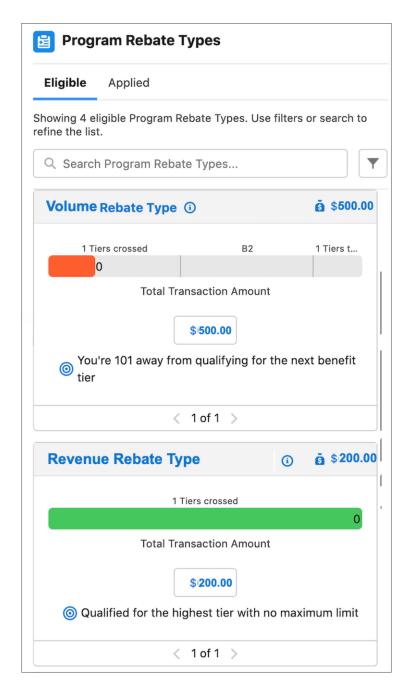
Rebate Management has a new actionType enumeration value.

Visualize Progress Against Rebates with Ease

Foster meaningful conversations between your sales reps or partners and customers by providing access to detailed information about incentives or rebates, directly on a record. The Program Rebate Types panel shows projected rebates or incentives, current progress against a rebate type, the amount required to reach the next tier, and the total projected rebate amount for the current year.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: Add the Program Rebate Types panel to an eligible object such as order, opportunity, account, or sales agreement.



SEE ALSO:

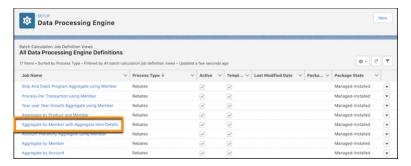
Salesforce Help: Manage Rebates and Incentives Within Sales Processes

View Detailed Information About Aggregate Rebate Transactions

Use the new Aggregate by Member with Aggregate Item Details Data Processing Engine template to ensure that you know exactly which transactions were included in an aggregated rebate or payout.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: From Setup, find and select **Data Processing Engine**. Open the Aggregate By Member with Aggregate Item Details template from the list, and then click **Save As**. Provide a name for your template, and save your work. Now, you're ready to use this definition on your rebate types.



SEE ALSO:

Salesforce Help: Streamline Calculations with Data Processing Engine Definitions

Automate Rebate Calculations with a New Rebate Orchestration Flow

Use the newer, simpler, better-performing, and similarly configurable Rebate Orchestration Flow 2. The flow includes a Run Rebate Payout Calculations 2 subflow that calls a new Calculate Rebate Payouts for All Periods batch job to determine the payout periods used to process rebate payouts. In addition, the subflow calls a new Rebate Calculations Post Processing job that leverages the data processing engine to update the status of payout periods.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: Clone and customize the out-of-the-box Rebate Orchestration Flow 2. To use this flow to process your rebate transactions and then generate payouts, schedule the custom flow at regular intervals.

SEE ALSO:

Salesforce Help: Flow Templates with Rebate Management Salesforce Help: Rebate Orchestration Flow 2

New Objects for Rebate Management

Do more with these new Rebate Management objects.

Provide details of a rebate claim

Use the new RebateClaim object.

Provide details of a rebate aggregate record

Use the new RebateMemberAggregateItem object.

New Invocable Actions in Rebate Management

Use the new invocable actions for Rebate Management.

Calculate the projected rebate amount for rebate types

Use the new calculateProjectedRebateAmount action.

Retrieve the eligible program rebate types for a mapped object

Use the new input fields appliedRebateTypesLimit, and appliedRebateTypesOffsetLimit, and the output fields appliedRebateTypesOffset, appliedRebateTypesLimit, and resultantRebateTypesForFlow with the getEligibleProgramRebateTypes action.

New Action Type Value in Rebate Management

Rebate Management has a new actionType enumeration value.

Action Types

Calculate the projected rebate amount for rebate types

Use the new calculateProjectedRebateAmount value in the existing actionType field on the FlowActionCall subtype of the Flow metadata type.

Record Alerts

The Record Alerts feature allows you to store and retrieve record alerts, and set up categorization of record alerts on the objects records.

IN THIS SECTION:

Connect REST API

Record Alerts REST API includes new calls.

Apex: New Items

These methods and classes are new.

Record Alerts Has New Metadata Types

Record Alerts has new metadata types.

Record Alerts Has New Tooling API Objects

Use Tooling API to work with the Record Alerts setup objects.

Connect REST API

Record Alerts REST API includes new calls.

Record Alerts

Retrieve active record alerts

Make a GET request to the new /recordalerts resource.

Required request parameters: whatId and parentId

New response body: Record Alert Collection

Dismiss or snooze internal record alerts

Make a POST request to the new /recordalerts/id/\${alertId}/actions resource.

New Request body: Record Alert Action Input

New response body: Record Alert Collection

Dismiss or snooze internal record alerts

Make a POST request to the new /recordalerts/externalId/\${sourceSystemId}/actions resource.

New Request body: Record Alert Action Input New response body: Record Alert Collection

Apex: New Items

These methods and classes are new.

ConnectApi Namespace

The ConnectApi namespace has these new methods and classes.

Methods

These new methods are in the ConnectApi.RecordAlert class.

Retrieve active record alerts

getRecordAlerts(parentId, whatId)

New output class: ConnectApi.RecordAlertCollection

Dismiss or snooze internal record alerts

performRecordAlertAction(alertId, actionParameters)

New input class: ConnectApi.RecordAlertActionInput

New output class: ConnectApi.RecordAlert

Dismiss or snooze external record alerts

performActionOnExternalAlerts(sourceSystemId, actionParameters)

New input class: ConnectApi.RecordAlertActionInput

New output class: ConnectApi.RecordAlert

Record Alerts Has New Metadata Types

Record Alerts has new metadata types.

Group and present record alerts by a category

Use the new RecordAlertCategory metadata type.

Record Alerts Has New Tooling API Objects

Use Tooling API to work with the Record Alerts setup objects.

Group and present record alerts by a category

Use the RecordAlertCategory object.

Determine the source for record alerts

Use the RecordAlertDataSource object.

Marketing

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

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

SEE ALSO:

Marketing Cloud Overview

Marketing Cloud: Earlier Release Notes

Salesforce Marketing Cloud Facebook Page

Mobile

Get more done in the Salesforce mobile app with new features like the new full-width tablet app experience and a new Mobile Home card for Pinned Lists Use the new Related Record Priming beta for more accurate and efficient record filtering. Plan for the retirement of tablet app experiences on all devices and the Managed Public Option for Mobile Publisher on Android devices.

IN THIS SECTION:

Salesforce Mobile App

Upgrade to Lightning on tablet, the new, generally available tablet experience, plan for retirement of all other app experiences, and check for updated requirements.

Briefcase Builder

With Related Record Priming (beta), admins can configure briefcases with the most relevant data for their mobile workforce.

Mobile Publisher

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement with the Spring '23 release.

Salesforce Mobile App

Upgrade to Lightning on tablet, the new, generally available tablet experience, plan for retirement of all other app experiences, and check for updated requirements .

IN THIS SECTION:

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of February 14, 2022.

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 455	✓	✓	
Data Access and Views			
Run Your Business on Tablets (Generally Available) on page 456	✓	✓	✓
Analytics			
View Lenses and Explore Data in the Salesforce Mobile App on page 172		~	
Productivity Features			
Quickly Reference Lists with the Mobile Home Pinned Lists Card on page 457	✓	~	
Mobile Home Enablement Just Got Easier on page 458	✓	~	
Salesforce Experiences			
Do More with Improved Deep Linking on iOS on page 459		✓	
Scroll Through Keyword Based Search Results on page 459	✓	~	
Access and Security			
Easily See and Monitor Mobile Security Policies Across Orgs on page 459	✓	~	
Miscellaneous			
Plan for Retirement of Two Tablet Experiences on page 459	✓	~	

Salesforce Mobile App Requirements Have Changed

Salesforce revised 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 Platform Requirements

The Salesforce mobile app is supported on phones and tablets that meet these mobile platform requirements.

Operating System and Version Requirements	
Android 8.0 or later	
iOS 14.0 or later	

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.

Mobile Devices Used for Testing

Salesforce performs automated and manual testing of the Salesforce mobile app for iOS and Android on a select set of mobile devices. This is the current list of devices.

Platform	Phones	Tablets	
Android	 Samsung Galaxy S7 Samsung Galaxy S8 Samsung Galaxy S9 / S9+ Samsung Galaxy Note 9 Samsung Galaxy S10 / S10e / S10+ Samsung Galaxy S20 / S20+ Samsung Galaxy S21 	 Samsung Galaxy Tab S6 Samsung Galaxy Tab S7 Samsung Galaxy Tab A (8 inch) 	
iOS	 iPhone 8 / 8 Plus iPhone 11 iPhone 11 Pro / Pro Max iPhone 12 iPhone 12 Pro / Pro Max iPhone XR iPhone SE 	 iPad Pro (10.5-inch, 11-inch) iPad Pro (9.7-inch, 6th generation and later) iPad Air 2 iPad Mini 4 	

Customers aren't blocked from using the Salesforce mobile app on untested devices that meet current platform requirements. Salesforce might not be able to replicate some issues for customers using the mobile app on untested devices or due to manufacturer-specific customizations.



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.

On phones and older tablet experiences, the Salesforce mobile app is supported in portrait orientation only. On tablets, if using the Lightning on tablet app experience, both portrait and landscape orientations are supported.

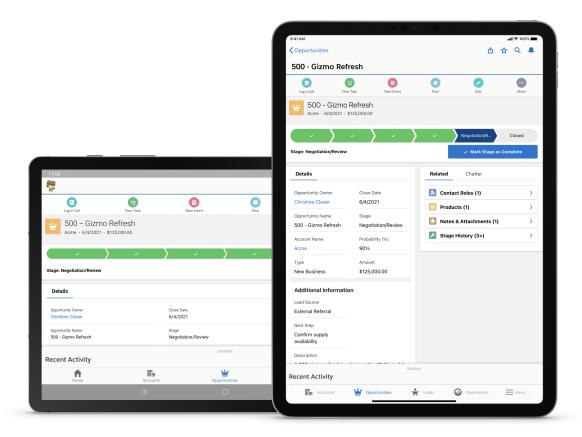
Run Your Business on Tablets (Generally Available)

Lightning on tablet, the new full-width tablet app experience, is now generally available in the Salesforce mobile app on iPad and Android tablets.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

Why: This new tablet app experience is performance-tuned for tablet users. It supports Lightning apps, navigation, record pages, rotation between portrait and landscape modes, and design time previews in Lightning App Builder. The new tablet experience runs on all currently supported iPad models and many Android tablet models. All other tablet experiences are scheduled for retirement in all Salesforce orgs as of Spring '23.

How: To turn on the full-width Lightning on tablet experience, from Setup, in the Quick Find box, enter *Quickstart*, and then select **New Salesforce Mobile App Quickstart**. Under Tablet App Experience, select **Lightning on tablet (Recommended)**.



SEE ALSO:

Salesforce Help: Salesforce Mobile App Considerations for Tablets (Right-click to view in a new tab or window.)

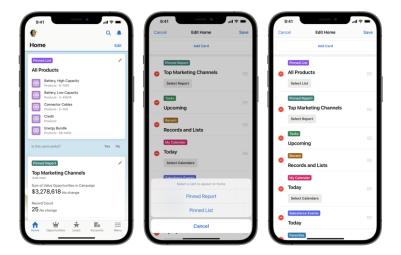
- Legacy Tablet App Experiences Update (Right-click to view in a new tab or window.)

Quickly Reference Lists with the Mobile Home Pinned Lists Card

Have tons of lists and can't find the ones you use the most? Now users can add the Pinned List card in Mobile Home to easily find commonly used lists of records and objects. Users can personalize which lists they want to see and can have multiple list cards.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

How: Navigate to Mobile Home, select Edit in the upper right corner, select Add Card, then select Pinned List.



SEE ALSO:

Salesforce Help: Enable Mobile Home for iOS and Android (Right-click to view in a new tab or window.)

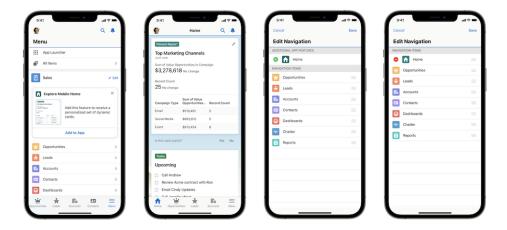
Mobile Home Enablement Just Got Easier

Now, users can instantly add the Mobile Home feature to their Lightning apps without your assistance. On the menu tab, users are prompted to add Mobile Home. Tapping "Add to App" enables Mobile Home as a navigation item to the tab bar. Mobile Home can be reordered just like other areas in the app by tapping the Edit button on the current Lightning App.

Where: This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

When: This feature is scheduled to be enabled by default in all organizations on February 28, 2022.

How: You can disable the user prompt from Setup by adding a custom connected app attribute. See Salesforce Help for detailed instructions after the feature is enabled.



SEE ALSO:

Salesforce Help: Enable Mobile Home for iOS and Android (Right-click to view in a new tab or window.)

Easily See and Monitor Mobile Security Policies Across Orgs

Mobile App Security now integrates with the Security Center. This enables you to log in only once and easily confirm settings, track changes, and configure Mobile Security Policies for all your orgs in a centralized location.

Where: Available at extra cost for the Salesforce mobile app in all editions, except Essentials and Database.com.

Who: Available for users with the View Security Center pages user permission. Requires the Security Center add-on subscription.

How: From Home, select the Security Center application then navigate to Configuration > Mobile Security Policies. Here you can view the Mobile app security policies that are set on your org and any child tenant.

SEE ALSO:

Salesforce Help: View Your Data in Security Center (Right-click to view in a new tab or window.)

Salesforce Help: Enable and Configure Mobile App Security Policies (Right-click to view in a new tab or window.)

Plan for Retirement of Two Tablet Experiences

Lightning on tablet: single-column and Legacy Salesforce1 are scheduled for full retirement in Spring '23. The new Lightning on tablet experience becomes the default tablet app experience for new organizations after Winter '22 and for all organizations in Spring '23.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

Why: A new, upgraded and unified tablet experience, Lightning on tablet, is available. We recommend that admins enable the new full-width experience for their organization prior to the retirement date. After the feature retirement period, all customers default to the new, full-width tablet experience. Customizations that weren't transitioned and tested can behave differently than desired in the new experience.

SEE ALSO:

- Legacy Tablet App Experiences Update (Right-click to view in a new tab or window.)

Scroll Through Keyword Based Search Results

We heard you; your users can now scroll infinitely through Keyword Based Search results on the Salesforce Mobile App.

Where: This change applies to the Salesforce mobile app for iOS and Androidin all editions, except Database.com.

When: This feature is available starting the week of March 13, 2022 for Android and March 28, 2022 for iOS.

SEE ALSO:

Salesforce Help: How Is Search Different in the Salesforce Mobile App? (Right-click to view in a new tab or window.)

Do More with Improved Deep Linking on iOS

Now, your users can tap on a link and be redirected to the Salesforce Mobile App to trigger a specific quick action or directly view a record relationship page.

Where: This change applies to the Salesforce mobile app for iOS in all editions, except Database.com.

When: These features are available starting the week of March 28, 2022

SEE ALSO:

Salesforce Help: Open Links with One Tap (Right-click to view in a new tab or window.)

Briefcase Builder

With Related Record Priming (beta), admins can configure briefcases with the most relevant data for their mobile workforce.

IN THIS SECTION:

Get Relevant Data in Briefcase Builder with Related Record Priming (Beta)

The Briefcase Builder tool helps you select and share records offline with mobile workers. With Related Record Priming (beta), admins can configure briefcases with the most relevant data for their mobile workforce. Configuration rules can be defined for objects based on their relationship with other objects, which makes record filtering more accurate and efficient.

Get Relevant Data in Briefcase Builder with Related Record Priming (Beta)

The Briefcase Builder tool helps you select and share records offline with mobile workers. With Related Record Priming (beta), admins can configure briefcases with the most relevant data for their mobile workforce. Configuration rules can be defined for objects based on their relationship with other objects, which makes record filtering more accurate and efficient.

Where: The Briefcase Builder tool applies to Lightning Experience desktop and all Salesforce orgs that have Field Service (FS) enabled. This tool supports the 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.

SEE ALSO:

Salesforce Help: Briefcase Builder Overview (Right-click to view in a new tab or window.)
Offline Priming in the Field Service Mobile App (Right-click to view in a new tab or window.)

Mobile Publisher

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement with the Spring '23 release.

IN THIS SECTION:

Plan for Managed Public Option for Android's Retirement

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement with the Spring '23 release (February 2023).

Easily Debug Your Experience Site with Playground App Simulator

Just as the Mobile Publisher Playground app allows you to preview your Experience site on your mobile device, the new Playground App Simulator enables you to debug your Experience site from the Mobile Publisher Playground app virtual device builds. You can use Playground App Simulator to test both the iOS and Android app implementations of your Experience site.

Scan Barcodes with Custom Lightning Web Components

Now you can build lightning components to allow your users to scan barcodes and QR codes from their Mobile Publisher app and integrate it in your business workflow.

Use Location Features in Your Mobile Publisher App

With LocationService, you can track your users' location and access location-based features.

Enjoy More Notification Options with Marketing Cloud Tools

Your notification options just got a lot more interesting! Now you can use Marketing Cloud tools such as Journey Builder and Automation Studio to send geolocation aware, rich media push notifications to your Mobile Publisher app. Notify your app users using the default Salesforce CRM platform notification builder as well as the newly integrated Marketing Cloud Platform tools.

Let Experience Cloud Site Users Deactivate Their Account

Use several new properties in the Customizable User Settings component to enable your users to deactivate their account from within Aura sites.

Plan for Managed Public Option for Android's Retirement

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement with the Spring '23 release (February 2023).

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

Why: In the Spring '23 release, Salesforce will retire Android app distribution through the Managed Public Option, a feature of Mobile Publisher for Logins, Mobile Publisher for Employees and Members, and Salesforce Mobile App Plus subscriptions. We recommend that you transfer your applications to your own Google Play account for Delegated Public or Delegated Private distribution as soon as possible.

SEE ALSO:

Mobile Publisher: Android- Managed Public Option Retirement

Easily Debug Your Experience Site with Playground App Simulator

Just as the Mobile Publisher Playground app allows you to preview your Experience site on your mobile device, the new Playground App Simulator enables you to debug your Experience site from the Mobile Publisher Playground app virtual device builds. You can use Playground App Simulator to test both the iOS and Android app implementations of your Experience site.

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

Scan Barcodes with Custom Lightning Web Components

Now you can build lightning components to allow your users to scan barcodes and QR codes from their Mobile Publisher app and integrate it in your business workflow.

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

Use Location Features in Your Mobile Publisher App

With LocationService, you can track your users' location and access location-based features.

Where: This feature is available in Lightning web components when they're running in Mobile Publisher.

Why: Some common examples of location-based features include:

- Display a user's current location on a map
- Get the user's current location when they perform an action
- Perform an action when a user approaches a destination

SEE ALSO:

Lightning Web Components Developer Guide: Use Location on a Mobile Device

Enjoy More Notification Options with Marketing Cloud Tools

Your notification options just got a lot more interesting! Now you can use Marketing Cloud tools such as Journey Builder and Automation Studio to send geolocation aware, rich media push notifications to your Mobile Publisher app. Notify your app users using the default Salesforce CRM platform notification builder as well as the newly integrated Marketing Cloud Platform tools.

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

Who: A Marketing Cloud license is required to access this feature. Contact Mobile Publisher Operations to complete your Marketing Cloud setup on Mobile Publisher.

Why: Watch this video for an in-depth look at the new Marketing Cloud Tools in action! External Link: Marketing Cloud Video

Let Experience Cloud Site Users Deactivate Their Account

Use several new properties in the Customizable User Settings component to enable your users to deactivate their account from within Aura sites.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Let Your Site Users Deactivate Their Account

Pardot

Enjoy more control over enhanced landing pages, which now include layout templates, header code support, and inline form styles. You also get Lightning templates for Salesforce Engage, and expanded automation support and Einstein Engagement Frequency for enhanced emails. Get more out of Pardot with new objects for Version 5 of the API, and the new Tracking and Consent JavaScript API. Plus, prepare for email privacy changes with Pardot's new open rules audit tool.

IN THIS SECTION:

Marketing Assets

Customize your enhaced landing pages with form styles, custom redirects for retired pages, and more. Easily build templates in Lightning for sales reps to use in Salesforce Engage emails. Plus, try the Slack connector for Pardot beta feature and monitor where the Slack completion action is being used on Pardot assets.

Automation

Push enhanced emails-now with tracker domain selection-to your automation rules and completion actions. Use Einstein Key Account intelligence to improve your automations. Plus, prepare for email privacy changes with Pardot's open rules audit tool.

Metrics and Reporting

Your email engagement data gets an extra layer of protection with improvements to Metrics Guard. Familiarize yourself with changes to B2BMA dataset. Plus, updates to visitor filters.

Pardot APIs and Admin

Version 5 of the Pardot API achieves parity with Versions 3 and 4. There's a new Tracking and Consent JavaScript API to give you more control over visitor tracking. Plus the Pardot Classic app has been retired for new accounts.

Marketing Assets

Customize your enhaced landing pages with form styles, custom redirects for retired pages, and more. Easily build templates in Lightning for sales reps to use in Salesforce Engage emails. Plus, try the Slack connector for Pardot beta feature and monitor where the Slack completion action is being used on Pardot assets.

IN THIS SECTION:

Enhanced Landing Page Experience

We updated the enhanced landing page experience, including in-builder form styling, a redirect option, layout templates, and the ability to add scripts to your page.

Create Custom Components for Email Template Builder

With custom components, you can help marketers and managers create more engaging email content for their customers.

Choose Which Email Template Types Are Available in Salesforce Engage

A new setting for Salesforce Engage lets you choose which types of templates sales reps can use when they send an Engage email. Plus, Lightning templates are now available for use in Salesforce Engage emails.

Reduce Email Fatigue with Einstein Engagement Frequency

Einstein Engagement Frequency scans individual customer engagement behaviors to predict the optimal send frequency for marketing emails. The frequency category is stored in a prospect field, and can be used to filter prospect lists or as criteria in Engagement Studio.

Improvements to the Pardot Slack Connector (Beta)

This beta feature includes some improvements since the last release. The completion action to send a Slack notification when prospects interact with your marketing assets is now available in the interactive Pardot Email Experience. Plus, there's now a Usage tab on the Slack connector so you can see which assets your marketing team is using the completion action on.

Bot Protection Is Added to Forms

To help protect users from excessive automated form submissions, we now add a reCAPTCHA field to any form that receives an unexpected number of submissions over one minute. When Pardot detects an unusual burst of form submissions, the field appears to your customers automatically. This anti-abuse functionality is enabled by default and doesn't interfere with your other reCAPTCHA settings.

Choose Your A/B Test Version at a Glance

When you copy or edit an A/B Test email in Pardot, the thumbnail previews now appear by default, making it easier to pick which version to keep. You get no pop-ups, fewer clicks, and faster setup.

Update Your Google Ads Connector for Pardot

To accommodate the new Google Ads API, the Google Ads connector in Pardot is changing. To maintain a verified connector, reenter your Google Ads account information in the connector settings. If you use an agency to manage your advertising, select the checkbox and provide a manager account number.

Enhanced Landing Page Experience

We updated the enhanced landing page experience, including in-builder form styling, a redirect option, layout templates, and the ability to add scripts to your page.

IN THIS SECTION:

Customize Pardot Form Styles in the Enhanced Landing Page Builder

Apply colors, fonts, margins, and more to a Pardot form inside the enhanced landing page builder. As you edit values in the Style tab, the changes appear on the canvas.

Set a Redirect for Unpublished Landing Pages

You can now configure redirect settings that activate when an enhanced landing page is unpublished. Previously, when a Pardot landing page is removed from the web, a default redirect sends visitors to the website listed in your Pardot Settings. The new Redirect Target field on a landing page record can support the default website or a custom URL that you provide.

Add Scripts to Landing Pages

Enhanced landing pages now support script code, such as the JavaScript used to support Google Analytics tracking. You can add code to the header or footer of an individual landing page, using <link>, <script>, and <style> tags.

Build Faster with Page Layouts and Breadcrumbs

With new prebuilt layouts available in the enhanced landing page builder, you can drag in rows and columns in seconds. New breadcrumbs make it easy to edit rows.

Changes to Content Last Saved Fields

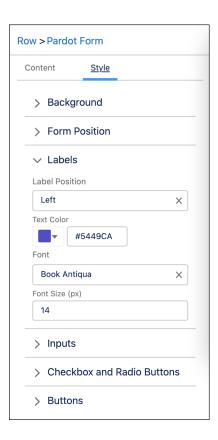
We added new fields to consider when updating the Content Last Saved and Content Last Saved By fields on enhanced landing page records. These fields now show a timestamp or name when someone edits the Name or Campaign field, as well as the new Spring '22 fields Unpublish Redirect URL, Header Code, and Footer Code. Changes to the content, search settings, and Vanity URL fields continue to update these two tracking fields.

Customize Pardot Form Styles in the Enhanced Landing Page Builder

Apply colors, fonts, margins, and more to a Pardot form inside the enhanced landing page builder. As you edit values in the Style tab, the changes appear on the canvas.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: After you drag in a Pardot Form component, click the Style tab to access a variety of styling options.



SEE ALSO:

Salesforce Help: Style Pardot Forms on Enhanced Landing Pages (Right-click to view in a new tab or window.)
Salesforce Help: Using Form Styles with Enhanced Landing Pages (Right-click to view in a new tab or window.)

Set a Redirect for Unpublished Landing Pages

You can now configure redirect settings that activate when an enhanced landing page is unpublished. Previously, when a Pardot landing page is removed from the web, a default redirect sends visitors to the website listed in your Pardot Settings. The new Redirect Target field on a landing page record can support the default website or a custom URL that you provide.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: Configure your redirect when you create or edit an enhanced landing page. If you're ready to unpublish a landing page and want to set up a redirect, edit the record first, and then click Unpublish.

SEE ALSO:

Salesforce Help: Create an Enhanced Landing Page (Right-click to view in a new tab or window.)

Add Scripts to Landing Pages

Enhanced landing pages now support script code, such as the JavaScript used to support Google Analytics tracking. You can add code to the header or footer of an individual landing page, using , <script>, and <style> tags.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: From a landing page record, open the Settings tab and edit the header or footer code block. When the landing page is published, the code blocks are pulled into the landing page source. Be sure to test the landing page before you share it with prospects.

SEE ALSO:

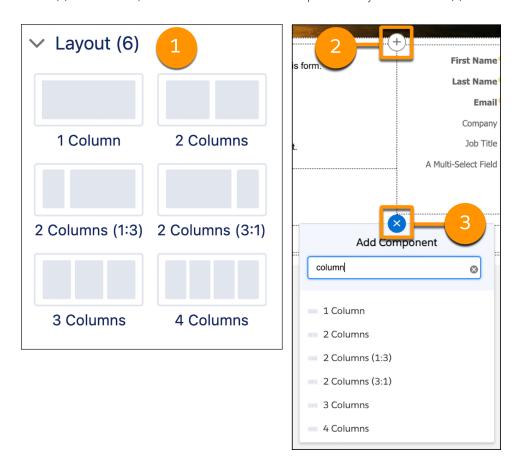
Salesforce Help: Use Custom Code with Enhanced Landing Pages (Right-click to view in a new tab or window.)

Build Faster with Page Layouts and Breadcrumbs

With new prebuilt layouts available in the enhanced landing page builder, you can drag in rows and columns in seconds. New breadcrumbs make it easy to edit rows.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

How: When you open an enhanced landing page, you can select a layout two ways. Drag a layout from the component pane (1), or click + (2) on the canvas, and then search or select the component that you want to add (3).



Breadcrumbs appear at the top of editing panes to help you navigate to a row where you can add and style columns.



Changes to Content Last Saved Fields

We added new fields to consider when updating the Content Last Saved and Content Last Saved By fields on enhanced landing page records. These fields now show a timestamp or name when someone edits the Name or Campaign field, as well as the new Spring '22 fields Unpublish Redirect URL, Header Code, and Footer Code. Changes to the content, search settings, and Vanity URL fields continue to update these two tracking fields.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

SEE ALSO:

Salesforce Help: Enhanced Landing Page Record Fields (Right-click to view in a new tab or window.)

Create Custom Components for Email Template Builder

With custom components, you can 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. It also applies to the Email Template Builder in all Pardot editions.

SEE ALSO:

Create Custom Components for Email Template Builder

Salesforce Help: Using Custom Components in Email (Right-click to view in a new tab or window.)

Choose Which Email Template Types Are Available in Salesforce Engage

A new setting for Salesforce Engage lets you choose which types of templates sales reps can use when they send an Engage email. Plus, Lightning templates are now available for use in Salesforce Engage emails.

Where: This change applies to all Pardot editions with Salesforce Engage.

How: When you edit Pardot Settings, the Salesforce Engage section includes options for Pardot Classic or Lightning email templates. Pardot Classic templates are selected by default. When you select Lightning templates, choose the locations for approved Lightning templates. You can allow lightning templates from public folders, sales reps' private folders, or specific Lightning template folders.

SEE ALSO:

Salesforce Help: Set Template Options for Salesforce Engage (Right-click to view in a new tab or window.)

Idea Exchange: Custom Templates for Salesforce Engage

Reduce Email Fatigue with Einstein Engagement Frequency

Einstein Engagement Frequency scans individual customer engagement behaviors to predict the optimal send frequency for marketing emails. The frequency category is stored in a prospect field, and can be used to filter prospect lists or as criteria in Engagement Studio.

Where: This change applies to Pardot Advanced and Premium editions with Salesforce Professional, Enterprise, or Unlimited edition.

How: Enable Einstein Engagement Frequency in Marketing Setup. When adequate data is detected, the model is typically trained within 72 hours. After frequency categories appear on prospect records, users can select the field as criteria to create dynamic lists or Engagement Studio rules.



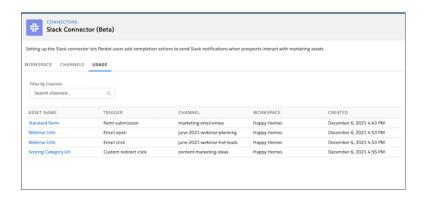
SEE ALSO:

Salesforce Help: Einstein Engagement Frequency for Pardot (Right-click to view in a new tab or window.)
Einstein Release Notes

Improvements to the Pardot Slack Connector (Beta)

This beta feature includes some improvements since the last release. The completion action to send a Slack notification when prospects interact with your marketing assets is now available in the interactive Pardot Email Experience. Plus, there's now a Usage tab on the Slack connector so you can see which assets your marketing team is using the completion action on.

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.



SEE ALSO:

Salesforce Help: Salesforce Pardot for Slack (Beta) (Right-click to view in a new tab or window.)

Bot Protection Is Added to Forms

To help protect users from excessive automated form submissions, we now add a reCAPTCHA field to any form that receives an unexpected number of submissions over one minute. When Pardot detects an unusual burst of form submissions, the field appears to your customers automatically. This anti-abuse functionality is enabled by default and doesn't interfere with your other reCAPTCHA settings.

Where: This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

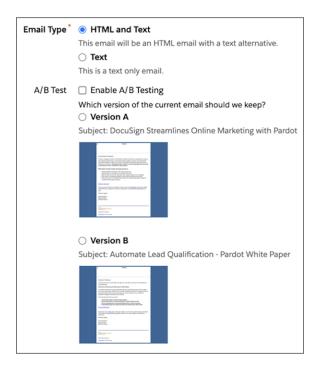
When: The reCAPTCHA functionality becomes available after February 14, 2022.

Choose Your A/B Test Version at a Glance

When you copy or edit an A/B Test email in Pardot, the thumbnail previews now appear by default, making it easier to pick which version to keep. You get no pop-ups, fewer clicks, and faster setup.

Where: This change applies to all Pardot editions.

When: This functionality becomes available to all users by February 24, 2022.

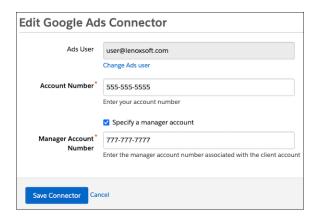


Update Your Google Ads Connector for Pardot

To accommodate the new Google Ads API, the Google Ads connector in Pardot is changing. To maintain a verified connector, reenter your Google Ads account information in the connector settings. If you use an agency to manage your advertising, select the checkbox and provide a manager account number.

Where: This change applies to all Pardot editions.

How: Update your Google Ads connector before April 27, 2022 to keep your connector verified. In Pardot Settings, open your Google Ads connector for editing. Then enter your Google Ads account number. If you have a manager account, select the checkbox. Then enter the manager account number. Otherwise, leave the checkbox unselected. Save your work. The connector now appears as verified on the connector details page.



Automation

Push enhanced emails-now with tracker domain selection-to your automation rules and completion actions. Use Einstein Key Account intelligence to improve your automations. Plus, prepare for email privacy changes with Pardot's open rules audit tool.

IN THIS SECTION:

Push Emails from Lightning Experience to Automation Rules and Completion Actions

When you activate emails for automation from the drag-and-drop editor in Lightning Experience, you can now use them in automation rules and completion actions. Previously, they were available for Engagement Studio programs only.

Specify Tracker Domains for Automated Emails in Lightning

Now you get tracker domain support when you activate an email for use in automations in the interactive Pardot email experience. When automated emails are sent using your email content record, links are rewritten with your preferred domain.

Filter Pardot Automations with Einstein Account Tier Field

Leverage the power of Einstein AI in automation rules, segmentation rules, and dynamic lists in Engagement Studio. After the Einstein Key Accounts Identification model starts assigning account tiers, you can segment and automate on that tier value in Pardot.

Prepare Your Pardot Automations for Email Privacy Changes

To help you adapt to Apple's Mail Privacy Protection changes, Pardot now includes a reporting page showing an overview of automations that rely on email opens. Use the Open Rule Audit page to move away from email opens and prioritize other high-value metrics.

Activate External Activity Objects for Automation More Easily

There's a new checkbox on the Marketing App Extension object home and the activities related list that lets you quickly change the automation status of extensions or activity types. Previously, you had to open the record to update the automation status.

Plan for Pardot Drip Program Retirement

Pardot's legacy Drip Programs feature is scheduled for retirement with the Summer '22 release. If you currently use Drip Programs, convert them to Engagement Studio programs.

Drip Program Reports Are Moving

Reports for Pardot's legacy Drip Programs feature are now under an Automations subcategory with other similar features. In Pardot, navigate to Reports, then Automations, and click Drip Programs.

Push Emails from Lightning Experience to Automation Rules and Completion Actions

When you activate emails for automation from the drag-and-drop editor in Lightning Experience, you can now use them in automation rules and completion actions. Previously, they were available for Engagement Studio programs only.

Where: This change applies to all Pardot editions.

Who: Users with the Activate Email for Automation system permission.

How: When a user with the appropriate permissions activates an email for automation, the campaign, sender, and reply-to settings apply to automation rule, completion action, and Engagement Studio emails.

SEE ALSO:

Salesforce Help: Activate an Email for Use in Automations (Right-click to view in a new tab or window.)

Specify Tracker Domains for Automated Emails in Lightning

Now you get tracker domain support when you activate an email for use in automations in the interactive Pardot email experience. When automated emails are sent using your email content record, 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 on the automation settings.

SEE ALSO:

Salesforce Help: Activate an Email for Use in Automations (Right-click to view in a new tab or window.)

Filter Pardot Automations with Einstein Account Tier Field

Leverage the power of Einstein AI in automation rules, segmentation rules, and dynamic lists in 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 Pardot Advanced or Premium editions with Salesforce Enterprise, Performance, or Unlimited 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:

Einstein Release Notes

Prepare Your Pardot Automations for Email Privacy Changes

To help you adapt to Apple's Mail Privacy Protection changes, Pardot now includes a reporting page showing an overview of automations that rely on email opens. Use the Open Rule Audit page to move away from email opens and prioritize other high-value metrics.

Where: This change applies to all Pardot editions.

How: Under Pardot Reports, navigate to Marketing Assets, then Automations, and click Open Rules. Click top-level metrics for engagement programs, dynamic lists, and automation rules to jump down to the related page section.



SEE ALSO:

Salesforce Help: Pardot Automation Open Rules Audit (Right-click to view in a new tab or window.)

Activate External Activity Objects for Automation More Easily

There's a new checkbox on the Marketing App Extension object home and the activities related list that lets you quickly change the automation status of extensions or activity types. Previously, you had to open the record to update the automation status.

Where: This change applies to Pardot Plus, Advanced, and Premium editions.

How: From Marketing Setup, navigate to Marketing App Extensions. Use the **Active in Automations** checkbox on the list view to change an extension's status.



To change the status of an activity type, open the associated Marketing App Extension, and then click the action menu for the activity you want to update. From here, you can activate the activity type for automations, or open the record for editing.



SEE ALSO:

Salesforce Help: Capture External Prospect Activity in Pardot (Right-click to view in a new tab or window.)

Plan for Pardot Drip Program Retirement

Pardot's legacy Drip Programs 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 standalone Pardot and the Pardot Classic app with all Pardot editions.

When: For customers who don't use drip programs, the feature was 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 (Right-click to view in a new tab or window.)

Drip Program Reports Are Moving

Reports for Pardot's legacy Drip Programs feature are now under an Automations subcategory with other similar features. In Pardot, navigate to Reports, then Automations, and click Drip Programs.

Where: This change applies to standalone Pardot and the Pardot Classic app with all Pardot editions.

Who: Drip Programs are being retired with the Summer '22 release. This change applies to customers with active Drip Programs. Customers who don't use Drip Programs don't have access to the feature or related reporting.

Metrics and Reporting

Your email engagement data gets an extra layer of protection with improvements to Metrics Guard. Familiarize yourself with changes to B2BMA dataset. Plus, updates to visitor filters.

IN THIS SECTION:

Improved Thresholds for Metrics Guard Filtering

Metrics Guard for Pardot email now has improved filtering thresholds to catch more bot-click activity. This feature works by looking for bursts of open and click activity that exceed certain thresholds. Pardot then stops recording activity for those IPs until it falls below the threshold.

Sender Field Was Changed in B2BMA Dataset

The Sender field in the Email Template dataset for B2B Marketing Analytics is updated. Because a sender hierarchy is common on email templates, this dataset field now stores the static email address saved as the last sender option.

Visitor Filters Apply Retroactively

Now when you create or edit a visitor filter, it filters future activities from visitors who became associated with the IP address or hostname up to 90 days before the filter was created. Previously, visitor filters only applied to visitors that were new after the filter was created.

Improved Thresholds for Metrics Guard Filtering

Metrics Guard for Pardot email now has improved filtering thresholds to catch more bot-click activity. This feature works by looking for bursts of open and click activity that exceed certain thresholds. Pardot then stops recording activity for those IPs until it falls below the threshold.

Where: This change applies to all Pardot editions.

Sender Field Was Changed in B2BMA Dataset

The Sender field in the Email Template dataset for B2B Marketing Analytics is updated. Because a sender hierarchy is common on email templates, this dataset field now stores the static email address saved as the last sender option.

Where: This change applies Pardot Plus, Advanced, and Premium. This change also affects Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.

When: The updated Sender field rolls out over several days and becomes available to eligible customers by December 20, 2021.

Why: Some users reported that the Sender field was blank because of the hierarchical nature of the field. The field now stores a value when a specified user or general user's name is available.

SEE ALSO:

Salesforce Help: B2B Marketing Analytics Datasets (Right-click to view in a new tab or window.)

Visitor Filters Apply Retroactively

Now when you create or edit a visitor filter, it filters future activities from visitors who became associated with the IP address or hostname up to 90 days before the filter was created. Previously, visitor filters only applied to visitors that were new after the filter was created.

Where: This change applies to all Pardot editions.

SEE ALSO:

Salesforce Help: Considerations for Visitor Filters (Right-click to view in a new tab or window.)

Pardot APIs and Admin

Version 5 of the Pardot API achieves parity with Versions 3 and 4. There's a new Tracking and Consent JavaScript API to give you more control over visitor tracking. Plus the Pardot Classic app has been retired for new accounts.

IN THIS SECTION:

Pardot API: New and Changed Items

Access more of your Pardot data with new and updated objects for the Version 5 API.

Pardot Classic App Is Being Retired

As of October 11, 2021, the Pardot Classic App is no longer available for new accounts, and it's scheduled for retirement in all Salesforce orgs by October 17, 2022.

Pardot API: New and Changed Items

Access more of your Pardot data with new and updated objects for the Version 5 API.

New Objects in Version 5

Form Handler

Supports create, read, update, delete, and query.

Form Handler Field

Supports create, read, update, delete, and guery.

Landing Page

Supports read and query.

Visitor

Supports read, query, assign to prospect, and identify company.

Visitor Activity

Supports read and query.

Opportunity

Supports read and query.

Dynamic Content

Supports read and query.

Dynamic Content Variation

Supports read and query.

Email Template

Supports create, read, update, delete, and query.

List Membership

Supports create, read, update, delete, and query.

Email

Supports read and query.

List Email

Supports read and query.

Lifecycle Stage

Supports read and query.

Updated Objects in Version 5

Prospect

Added support for create, update, delete, undelete, upsert all by latest.

Visitor Page View

The fields visitorId and visitID are now sortable.

Campaign

Added the connectSalesforceCampaign record action to allow you to associate a Pardot campaign to a Salesforce campaign.

Other API Changes

New Tracking and Consent JavaScript API

This new API provides functions for each step in the page view tracking process, giving you control over how Pardot tracks page views. Use the API to implement your own solutions that cover your compliance needs and use cases.

External Activity Export

Added the ability to export External Activity in v3 and v4 of the Pardot API.

SEE ALSO:

Idea Exchange: Include Landing Pages in list of objects you can query via the API

Idea Exchange: Ability to Create, Update, Delete Pardot email templates via API

Idea Exchange: PARDOT API: Add Query for Email Template

Idea Exchange: Include Sender field in Pardot email API

Pardot Classic App Is Being Retired

As of October 11, 2021, the Pardot Classic App is no longer available for new accounts, and it's scheduled for retirement in all Salesforce orgs by October 17, 2022.

Where: This change applies to all Pardot accounts.

Quip

Get the most out of your Salesforce data with Quip. Choose whether you want your users to work in Quip with documents that auto-fill with Salesforce data or in Lightning Experience with Quip documents embedded in Salesforce records. Measure and report on your users' document engagement with faster and more thorough Quip metrics. Use multi-factor authentication to protect your Quip data.

IN THIS SECTION:

When to Expect Quip Features

New Quip features are coming soon.

Get Ready for Upcoming Multi-Factor Authentication Enforcement

As of February 1, 2022, customers are contractually required to use multi-factor authentication (MFA) to access Quip, either when logging in directly or through single sign-on (SSO). To help customers comply with the MFA requirement, Salesforce will enable MFA for Quip on February 1, 2022 and enforce MFA on May 1, 2022.

Keep Your Quip Users Working in Lightning Experience with Admin Control Enhancements

Ensure that your users work on embedded Quip documents and spreadsheets in Lightning Experience instead of Quip.com. Remove the Open in Quip button from Lightning Experience so that your users always collaborate within the context of your Salesforce records.

See Which Quip Users Are Connected to Salesforce

Identify the users who haven't connected Salesforce and Quip, and then send them an email reminder. After they complete the setup, your users can access all Quip features in Salesforce and add live Salesforce data to documents. Also, your Quip engagement metrics become more accurate.

Gain Deeper Insights with Faster Quip Engagement Metrics

To make reporting more accurate and help you see data sooner, we continue to enhance Quip engagement metrics. Metrics are now updated 24 hours after user activity instead of 48 hours. If your org is down, your Quip site metrics are still captured so that you don't miss any insights. Also, Quip engagement metrics are now automatically enabled in all orgs that have Quip enabled. Quip captures 30 days of historical engagement data so that you have actionable information right from the start. To get a more complete view of your user engagement, you can request additional historical metrics from the Quip Admin Console.

Get Better Performance and Save Time with the Quip Automation API

Work faster with more lightweight, scalable versions of API methods. Share a folder's contents with your whole company and increase transparency. Use new print options to customize generated PDF files.

Get More Flexibility and Increased Stability with Quip's APIs

Use the OpenAPI Specification (OAS) files for the Quip Admin and Quip Automation APIs to test APIs and build integrations between Quip and your other systems. We introduced per-company rate limits for the Quip Admin and Quip Automation APIs to ensure fair and reliable access to our APIs for all of our customers.

Gain More Efficiency with Quip CLI

Speed up your Quip live app development process with an automated login to Quip. With the Quip CLI option called --export, you can get and export a new access token. And the --with-token option provides an automatic login via your access token instead of a redirect to a manual login.

Get the Enhanced Quip Experience

Learn more about the new enhancements to Quip.

When to Expect Quip Features

New Quip features are coming soon.

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, Quip Plus, or Quip Advanced.

When: See when you can start using new Quip features.

Feature	Date
Get ready for upcoming multi-factor authentication enforcement	February 2022
Ensure that Quip users work in Lightning Experience	February 2022
Remind Quip users to connect to Salesforce	Available now
Enhancements to Quip engagement metrics	February 2022
Get better performance and save time with the Quip Automation API	March 2022
Get more flexibility and Increased stability with Quip's APIs	February 2022
Gain more efficiency with Quip CLI	February 2022

Get Ready for Upcoming Multi-Factor Authentication Enforcement

As of February 1, 2022, customers are contractually required to use multi-factor authentication (MFA) to access Quip, either when logging in directly or through single sign-on (SSO). To help customers comply with the MFA requirement, Salesforce will enable MFA for Quip on February 1, 2022 and enforce MFA on May 1, 2022.

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, Quip Starter, Quip Plus, or Quip Advanced.

How: Note these critical dates.

- **February 1, 2022**—If you haven't already enabled MFA, Salesforce will automatically enable it for direct logins to Quip sites. Users will be prompted to register for MFA the next time they log in. If you're not ready for MFA, administrators can disable it, but you'll be out of compliance with your contractual obligations.
- May 1, 2022—We'll begin enforcing MFA for all direct logins to Quip sites. At this time, all users must use MFA and will be prompted to register for it if they haven't. If you previously disabled MFA, we'll turn it back on. In addition, we'll remove the option for administrators to disable MFA for their sites.

If you use SSO to access Quip, we won't enable MFA for your SSO provider. We won't block access to Quip or prompt users to complete MFA verification if your SSO service doesn't require MFA. However, you're still contractually obligated to implement MFA for all your users who access Quip through SSO. To comply with this requirement, you can use your SSO provider's MFA service.

SEE ALSO:

Enable Multi Factor Authentication (MFA) for Quip Salesforce Multi-Factor Authentication FAQ Multi-Factor Authentication Enforcement Roadmap

Keep Your Quip Users Working in Lightning Experience with Admin Control Enhancements

Ensure that your users work on embedded Quip documents and spreadsheets in Lightning Experience instead of Quip.com. Remove the Open in Quip button from Lightning Experience so that your users always collaborate within the context of your Salesforce records.

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 Quip Advanced.

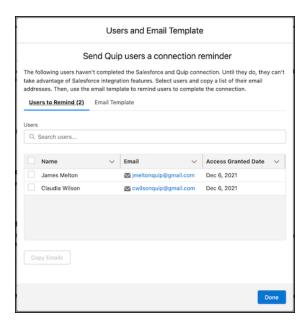
How: From Setup, in the Quick Find box, enter *Quip*, and then select **Quip** (Salesforce Anywhere). Toggle Open Documents in Quip.com to **Inactive**.

See Which Quip Users Are Connected to Salesforce

Identify the users who haven't connected Salesforce and Quip, and then send them an email reminder. After they complete the setup, your users can access all Quip features in Salesforce and add live Salesforce data to documents. Also, your Quip engagement metrics become more accurate.

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 Quip Advanced.

How: From Setup, in the Quick Find box, enter Quip, and then select **Quip (Salesforce Anywhere)**. Under Remind Quip Users to Connect to Salesforce, click **Get Users and Template**. From the window, copy a list of user email addresses and the reminder email template. In your email client, paste the copied content into a new email.



SEE ALSO:

Salesforce Help: Remind Quip Users to Connect to Salesforce (Right-click to view in a new tab or window.)

Gain Deeper Insights with Faster Quip Engagement Metrics

To make reporting more accurate and help you see data sooner, we continue to enhance Quip engagement metrics. Metrics are now updated 24 hours after user activity instead of 48 hours. If your org is down, your Quip site metrics are still captured so that you don't miss any insights. Also, Quip engagement metrics are now automatically enabled in all orgs that have Quip enabled. Quip captures 30 days of historical engagement data so that you have actionable information right from the start. To get a more complete view of your user engagement, you can request additional historical metrics from the Quip Admin Console.

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 Quip Advanced.

SEE ALSO:

Salesforce Help: Request Historical Engagement Metrics (Right-click to view in a new tab or window.)

Get Better Performance and Save Time with the Quip Automation API

Work faster with more lightweight, scalable versions of API methods. Share a folder's contents with your whole company and increase transparency. Use new print options to customize generated PDF files.

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, Quip Plus, or Quip Advanced.

Why: Get improved functionality with these new and updated API methods.

- Copy a Document or Template
 - Copy a Document or Template V2—Easily reuse content by copying a Quip document, spreadsheet, or template. For example, after a step is completed, copy a template and add your specified content.

- Copy a Document or Template V1—For better performance, we reduced the number of folder IDs that you can pass in to a
 maximum of 100.
- Get Thread is now split into leaner methods that perform specific tasks.
 - **Get Thread V2**—Get basic information about a Quip document, spreadsheet, or chat.
 - Get Thread HTML V2—Retrieve the HTML for a Quip document or spreadsheet to create automations.
 - **Get Thread Members V2**—See which users have been directly added to a thread to monitor access to it.
 - Get Thread Invited Members V2—Monitor collaboration requests by getting the list of users who were invited via email to become direct members of a thread.
 - Get Thread Shared Folders V2—Improve folder organization by getting the list of folders that a thread is in.
- Get Threads
 - Get Threads V2—Get basic information about multiple Quip documents, spreadsheets, or chats.
- Add People to a Thread or Add a Thread to Folders is now split into two separate methods.
 - Add People to a Thread V2—Share a Quip document, spreadsheet, or chat with individuals within and across teams.
 - Add Thread to Folders V2—Add a Quip document, spreadsheet, or chat to up to 100 folders to share information within and
 across teams.
- Edit Folder Link Sharing Settings
 - Enable link sharing on a folder to give users quick access to new or updated content.
- Get Folder Link Sharing Settings
 - Control access by monitoring folder sharing settings.
- Create Export PDF Request
 - Use the new apply_print_options input to specify whether to use this formatting in an exported PDF: include all headers and
 footers, print collapsed content, and remove web formatting such as live data formatting.

SEE ALSO:

Quip Automation API Documentation (can be outdated or unavailable before March 2022) REST API Versioning FAQ

Get More Flexibility and Increased Stability with Quip's APIs

Use the OpenAPI Specification (OAS) files for the Quip Admin and Quip Automation APIs to test APIs and build integrations between Quip and your other systems. We introduced per-company rate limits for the Quip Admin and Quip Automation APIs to ensure fair and reliable access to our APIs for all of our 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, Quip Plus, or Quip Advanced.

Why: For the Quip Admin and Quip Automation APIs, the default per-company rate limit is 600 requests per minute. The API responses include these new custom headers to help your developers implement backoffs in their code:

- X-Company-RateLimit-Limit: The number of requests per minute that your company can make
- X-Company-RateLimit-Remaining: The number of requests remaining for your company within the minute
- X-Company-RateLimit-Reset: The UTC (Coordinated Universal Time) timestamp for when the rate limit resets

• X-Company-Retry-After: The number of seconds after which your company can make API calls again

SEE ALSO:

Quip OAS Files

Admin API Rate Limit Documentation (can be outdated or unavailable before February 2022)

Automation API Rate Limit Documentation (can be outdated or unavailable before February 2022)

Gain More Efficiency with Quip CLI

Speed up your Quip live app development process with an automated login to Quip. With the Quip CLI option called --export, you can get and export a new access token. And the --with-token option provides an automatic login via your access token instead of a redirect to a manual login.

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, Quip Plus, or Quip Advanced.

SEE ALSO:

Quip CLI Reference Documentation (can be outdated or unavailable before February 2022)

Get the Enhanced Quip Experience

Learn more about the new enhancements to Quip.

Where: This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available with an existing Quip for Customer 360 plan or Quip Advanced.

Why: Quip features include these enhancements.

- The Quip Template Library boasts improved performance for loading templates.
- Your users can now export PDFs faster than ever before.
- To improve productivity, we hid new user help windows in Quip Lightning Components. They no longer block your users from seeing the content of the Quip Document and Quip Associated Documents components.
- To improve performance, we set a limit of 1,000 threads (documents or spreadsheets) per Quip folder.

Revenue

Enhanced domains don't support new plugins, and we're enforcing data restrictions for Access permission sets. Browser performance improvements are coming, and so is default enforcement of encrypted customer IDs in Payeezy ACH payment methods. Prevent inaccurate credit allocations for invoices with header-level payment allocations. We fixed an error with crediting invoices that have equal total amounts and balances due to payment and debit allocations. Review new order and order product standard field permission requirements.

IN THIS SECTION:

Salesforce CPQ

We're enforcing data restrictions for the access permission sets. Browser performance improvements are coming. Review new order and order product standard field permission requirements for ordering and contracting.

Salesforce Billing

Prevent inaccurate credit allocations for invoices with header-level payment allocations. The Salesforce Billing package setting Use EncryptedCustomerId for Payeezy ACH Payment Methods is now enabled by default. And there's an error correction for credit invoices that have equal total amounts and balances due to payment and debit allocations. Review new order and order product standard field permission requirements for invoicing.

Salesforce CPQ

We're enforcing data restrictions for the access permission sets. Browser performance improvements are coming. Review new order and order product standard field permission requirements for ordering and contracting.



Note: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

Data Restrictions Are Enforced for Access Permission Sets

Ensure that users have secure and appropriate levels of access to objects and fields. We're now enforcing the data restrictions for the access permission sets that we introduced in Summer '21 and Winter '22.

Updates to Access Permission Sets

We updated the CPQ Partner User Access and CPQ Customer User Access permission sets. Review the changes to ensure that the new permissions align with your CPQ processes.

Get Ready for Browser Performance Improvements for Salesforce CPQ (Release Update)

This update allows Salesforce CPQ to run faster in supported web browsers by employing new Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Spring '22.

New Permission Requirements for Standard Order and Order Product Fields

The permissions required for orders and contracts in Salesforce CPQ have changed. If your users create orders or contracts from orders, they now need Read and Write access to all standard (non-CPQ, non-Billing) order and order product fields.

Data Restrictions Are Enforced for Access Permission Sets

Ensure that users have secure and appropriate levels of access to objects and fields. We're now enforcing the data restrictions for the access permission sets that we introduced in Summer '21 and Winter '22.

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

Why: In Salesforce CPQ Summer '21 and Winter '21, we introduced several new object and field permission requirements related to Salesforce CPQ data security. Users have two ways to access the new permissions.

- If you use custom CPQ permission sets, you can use four access permission sets available by default with Salesforce CPQ. In future releases, Salesforce CPQ will continue to add permission requirements as needed for data security settings. While most CPQ admins clone and then edit standard permission sets for org users, we designed access sets to be assigned directly to users without cloning or editing. This way, users don't miss important data security updates.
 - Salesforce CPQ Admin User Access
 - Salesforce CPQ Partner User Access
 - Salesforce CPQ Customer User Access
 - Salesforce CPO User Access
- If you don't use custom permission sets, Salesforce CPQ also adds permission requirements to the standard CPQ permission sets as needed in each release.

- Salesforce CPO Admin User
- Salesforce CPQ Partner User
- Salesforce CPO Customer User
- Salesforce CPO User

For example, let's say you assign a customized CPQ admin permission set to admins and the standard CPQ Customer User set to customers. In this case, assign the CPQ Admin User Access permission set to your admins. Your customers can continue using the CPQ Customer User set without changes.

To give users time to test the effects of the new permission requirements, we didn't enforce the permission requirements by default in Salesforce CPQ Summer '21. We also introduced the CPQ package setting Perform Enhanced Data Access Checks. When active, Salesforce CPQ enforced data restrictions for the Access permission sets.

Starting in Salesforce CPQ Spring '22, we're removing the Perform Enhanced Data Access Checks package setting and enforcing the new data security permission requirements. If you still want to disable the permission enforcement, file a request with Salesforce CPQ Support. In future major releases, the permission requirements will again be enforced by default.

Updates to Access Permission Sets

We updated the CPQ Partner User Access and CPQ Customer User Access permission sets. Review the changes to ensure that the new permissions align with your CPQ processes.

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

Why: In Salesforce CPQ Summer '21 and Winter '22, we introduced Partner User Access, Customer User Access, User Access, and Admin User Access permission sets. These sets contain important data security-related permission sets for Salesforce CPQ users. They'll be updated in new releases as needed.

As permission requirements are added in future releases, two methods ensure that your users never risk missing important data security updates, regardless of whether you use custom CPQ permission sets.

- 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. This way, you can still use your custom permission sets.
- We also provide the same updates in the standard Partner User, Customer User, Admin User, and User permission sets. If you don't clone or use custom permission sets, you can use the standard sets alone, without assigning Access sets.

How: We updated these permission sets. Check to see if your CPQ processes are affected.

Table 1: CPQ Partner User Access and CPQ Partner User

Object	Field	Change
Order	Contracted	Now requires Edit access
Order	Contracting Method	Now requires Edit access
Order Product	Activated	Now requires Read and Edit access
Order Product	Activation Status	Now requires Edit access
Order Product	Asset	Now requires Edit access
Order Product	Bookings Indicator	Now requires Edit access
Order Product	Contract	Now requires Edit access

Object	Field	Change
Order Product	Contract Action	Now requires Edit access
Order Product	Contracted	Now requires Edit access
Order Product	Contracting Method	Now requires Edit access
Order Product	Pricing Method	Now requires Edit access
Order Product	Prorate Multiplier	Now requires Edit access
Order Product	Segment Key	Now requires Read and Edit access
Order Product	Subscription	Now requires Edit access
Order Product	Terminated Date	Now requires Edit access
Quote Line	Quote	Now requires Read and Edit access

Table 2: CPQ Customer User Access and CPQ Customer User

These fields in the CPQ Customer User Access and CPQ Customer User permission sets now require Edit access. The order product's Quote field also requires Read and Edit access.

Object	Field	Change
Order	Contracted	Now requires Edit access
Order	Contracting Method	Now requires Edit access
Order	Payment Term	Now requires Edit access
Order	Price Calculation Status	Now requires Edit access
Order	Price Calculation Status Message	Now requires Edit access
Order	Quote	Now requires Edit access
Order	Renewal Uplift (%)	Now requires Edit access
Order Product	Activated	Now requires Edit access
Order Product	Activation Status	Now requires Edit access
Order Product	Asset	Now requires Edit access
Order Product	Billing Frequency	Now requires Edit access
Order Product	Billing Type	Now requires Edit access
Order Product	Block Price	Now requires Edit access
Order Product	Bookings Indicator	Now requires Edit access
Order Product	Charge Type	Now requires Edit access

Object	Field	Change
Order Product	Contract	Now requires Edit access
Order Product	Contract Action	Now requires Edit access
Order Product	Contracted	Now requires Edit access
Order Product	Contracting Method	Now requires Edit access
Order Product	Default Subscription Term	Now requires Edit access
Order Product	Discount Schedule	Now requires Edit access
Order Product	Ordered Quantity	Now requires Edit access
Order Product	Price Schedule	Now requires Edit access
Order Product	Pricing Method	Now requires Edit access
Order Product	Prorate Multiplier	Now requires Edit access
Order Product	Quote	Now requires Read and Edit access
Order Product	Quoted Quantity	Now requires Edit access
Order Product	Quote Line	Now requires Edit access
Order Product	Required By	Now requires Edit access
Order Product	Revised Order Product	Now requires Edit access
Order Product	Segment Index	Now requires Edit access
Order Product	Subscription	Now requires Edit access
Order Product	Subscription Pricing	Now requires Edit access
Order Product	Subscription Term	Now requires Edit access
Order Product	Tax Code	Now requires Edit access
Order Product	Term Discount Schedule	Now requires Edit access
Order Product	Terminated Date	Now requires Edit access

Get Ready for Browser Performance Improvements for Salesforce CPQ (Release Update)

This update allows Salesforce CPQ to run faster in supported web browsers by employing new Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Spring '22.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ.

When: This update was first made available in Summer '21 and is enabled by default when a sandbox or production org is upgraded to Spring '22. In a future release, this update will be standard and can't be disabled. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: With Web Components V1 technology Salesforce CPQ runs faster, but the look and feel of your customizations can change. We recommend that you test your customizations on desktop and in the Salesforce Mobile App, focusing on these features.

- Quote line editor
- Product selection
- Salesforce CPQ favorites
- Product bundle configuration
- Quote calculator plugin
- Page security plugin

After the update is applied, depending on your customizations and the browser, some differences in the user interface are expected. To learn more about these known differences, see *Knowledge Article*: UI Changes Caused By Browser Performance Improvements for Salesforce CPQ.

If you encounter unwanted differences that can't be resolved by modifying your customizations, contact Salesforce CPQ Support. If possible, don't disable the release update, because the update will become standard and can't be disabled.

If you must disable the release update, use the Improve Browser Performance setting. From Setup, in the Quick Find box, enter Installed, and then click **Installed Packages**. Next to the Salesforce CPQ package, click **Configure**. In the Additional Settings tab, deselect **Improve Browser Performance**.

SEE ALSO:

Release Updates

New Permission Requirements for Standard Order and Order Product Fields

The permissions required for orders and contracts in Salesforce CPQ have changed. If your users create orders or contracts from orders, they now need Read and Write access to all standard (non-CPQ, non-Billing) order and order product fields.

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

Salesforce Billing

Prevent inaccurate credit allocations for invoices with header-level payment allocations. The Salesforce Billing package setting Use EncryptedCustomerId for Payeezy ACH Payment Methods is now enabled by default. And there's an error correction for credit invoices that have equal total amounts and balances due to payment and debit allocations. Review new order and order product standard field permission requirements for invoicing.



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 Inaccurate Credit Allocations for Invoices with Header-Level Payment Allocations

Your users can no longer apply credit notes to invoices that have header-level payment applications. This change prevents a credit note from being allocated to an invoice for more than the invoice balance. When the Salesforce Billing package setting Advanced AR Application is disabled, you can apply payments only to the invoice header, which doesn't reduce the balance of the invoice line. But when you credit an invoice, Salesforce Billing applies the credit only to the invoice line. Previously, if a user applied credit to an invoice with a header-level payment application, the invoice line balances could incorrectly represent a total balance greater than the invoice's header balance. This discrepancy bypassed rules that prevented credit application amounts greater than an invoice balance and caused incorrect balances.

Encrypted Customer IDs Are Enforced by Default for Payeezy ACH Payment Methods

Manage your information securely in Salesforce Billing when configuring ACH payment methods for Payeezy. The Salesforce Billing package setting Use EncryptedCustomerId for Payeezy ACH Payment Methods is now enabled by default.

Behavior for Crediting Invoices with Matching Balances and Total Amounts Due to Allocations Was Corrected

We fixed an issue with crediting an invoice with the same balance and total amount because of any combination of payment, debit, and credit allocations. Salesforce Billing now issues a credit note for the balance of the invoice. Previously, Salesforce Billing attempted to unallocate the payments, credit notes, and debit notes, which caused a validation error and incorrect credit allocation.

New Permission Requirements for Standard Order and Order Product Fields

The permissions required for invoices in Salesforce Billing have changed. Users who create invoices from orders now need Read and Write access to all standard (non-CPQ, non-Billing) order and order product fields.

Prevent Inaccurate Credit Allocations for Invoices with Header-Level Payment Allocations

Your users can no longer apply credit notes to invoices that have header-level payment applications. This change prevents a credit note from being allocated to an invoice for more than the invoice balance. When the Salesforce Billing package setting Advanced AR Application is disabled, you can apply payments only to the invoice header, which doesn't reduce the balance of the invoice line. But when you credit an invoice, Salesforce Billing applies the credit only to the invoice line. Previously, if a user applied credit to an invoice with a header-level payment application, the invoice line balances could incorrectly represent a total balance greater than the invoice's header balance. This discrepancy bypassed rules that prevented credit application amounts greater than an invoice balance and caused incorrect balances.

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

Why: Here's an example of the allocations before Salesforce Billing Spring '22. Advanced AR Application is disabled, and an invoice contains one invoice line with a balance of \$100. Apply a payment for \$50. Because Advanced AR Application is disabled, Salesforce Billing applies the payment directly to the invoice header and doesn't reduce the balance of the invoice line.

Table 3: After Payment Application

	Invoice	Invoice Line
Balance	\$50	\$100

Then create a credit note with a line amount of \$100 and apply \$75 to your invoice line. Salesforce Billing allowed the application because the invoice line balance was greater than the credit note line balance. But because the invoice header was reduced, the invoice had an incorrect negative balance.

Table 4: After Credit Application

	Invoice	Invoice Line
Balance	-\$25	\$25

How: The Apply Credit page no longer shows invoices with header-level payment applications, and the Credit Center shows an error if you attempt to allocate credit to an invoice with a header-level payment. To allocate credit on invoices with header-level payments, unallocate the invoice's payment first and then allocate the credit.

Encrypted Customer IDs Are Enforced by Default for Payeezy ACH Payment Methods

Manage your information securely in Salesforce Billing when configuring ACH payment methods for Payeezy. The Salesforce Billing package setting Use EncryptedCustomerId for Payeezy ACH Payment Methods is now enabled by default.

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

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 sent a default value with the gateway request. This value caused a failure response from the payment gateway.

In Salesforce Billing Winter '22, we introduced the Payeezy package field Encrypted Customer ID to payment methods. The field represents a unique customer value such as a social security number, tax ID, or driver's license number. The field is encrypted, so entered values are masked in Salesforce Billing. We also added the Use Encrypted Customerld for Payeezy ACH Payment Methods setting to the Payment tab of Salesforce Billing package settings. When the setting is enabled, Salesforce Billing includes the Encrypted Customerld value in ACH payment method data included in payment requests sent to Payeezy payment gateways. When the setting is disabled, Salesforce Billing uses Identification Id / Number. This package setting was disabled by default.

In Spring '22, Use EncryptedCustomerld for Payeezy ACH Payment Methods is enabled by default.

How: While Use EncryptedCustomerId for Payeezy ACH Payment Methods is enabled, Payeezy ACH payment methods require values for both Encrypted Customer ID and the Identification Type field.

To make successful payments while the Payeezy package is installed, Community users require Read access to the Encrypted Customer ID field. You can provide this access in two ways:

- In the community user's user profile, go to the Encrypted Customer ID field and select **Read**.
- Assign the Payeezy Admin Permission Set to the user.

If you don't want to use Encrypted Customer ID, deselect **Use EncryptedCustomerId for Payeezy ACH Payment Methods**.

SEE ALSO:

Salesforce Help: Permissions for the Hosted Card Payments Component (Right-click to view in a new tab or window.)

Behavior for Crediting Invoices with Matching Balances and Total Amounts Due to Allocations Was Corrected

We fixed an issue with crediting an invoice with the same balance and total amount because of any combination of payment, debit, and credit allocations. Salesforce Billing now issues a credit note for the balance of the invoice. Previously, Salesforce Billing attempted to unallocate the payments, credit notes, and debit notes, which caused a validation error and incorrect credit allocation.

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

How: For example, let's say you have a new invoice with a total amount and balance of \$100,000. You allocate a \$5,000 debit note, which brings the invoice's balance to \$105,000. You then allocate a payment to the debit amount, which returns the invoice's balance to \$100,000. Next, you click **Credit** on the invoice.

Previously, Salesforce Billing unallocated the debit notes and payments, showed an error "Type and Unallocated values cannot be changed," and then created and applied a credit note for \$105,000. Now, Salesforce Billing only creates and applies a credit note for the invoice's correct balance, in this case for \$100,000.

New Permission Requirements for Standard Order and Order Product Fields

The permissions required for invoices in Salesforce Billing have changed. Users who create invoices from orders now need Read and Write access to all standard (non-CPQ, non-Billing) order and order product fields.

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

Sales

Use Revenue Intelligence to generate more revenue with performance dashboards, analytics, and intuitive pipeline visualizations. Pipeline Inspection adds insights about deal progress and engagement. See transcripts for voice and video calls. Enjoy an improved setup experience for Collaborative Forecasts. Create more engaging email content with custom components in email templates created with Email Template Builder. Plan territories with help from overlays using choropleth maps and other boundaries in Salesforce Maps Territory Planning. High Velocity Sales users can start using sales cadences without building their own.

IN THIS SECTION:

Revenue Intelligence

With Revenue Intelligence, sales teams can achieve sales targets, grow pipelines, and ensure forecast accuracy like never before. Revenue Intelligence is a data-driven sales solution that unites Tableau CRM dashboards and analytics with an easy to visualize pipeline progress flow chart in Pipeline Inspection.

Pipeline Inspection

Get Al insights about opportunity progress, and engagement and activity details. See pipeline changes in a flow chart view. Edit opportunity fields inline while reviewing your pipeline.

Core Sales Features

Enjoy an improved setup experience for Collaborative Forecasts. Exclude specific accounts from territory assignment rules and track changes to assignments. When using products, new sharing methods introduced in release updates help protect your product data.

Sales Enablement (myTrailhead)

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

Productivity Features

Change the time frame used to capture emails for Einstein Activity Capture users. Inbox users can specify more granular settings for list emails. Create more engaging email content with Email Template Builder. See voice and video calls in the activity timeline.

Salesforce Maps

Build marker layers in Salesforce Maps and live layers in Live Tracking with ease. Design territories with the help from overlays using choropleth maps and other boundaries in Territory Planning. And start optimizations for a visit plan and accommodate schedule changes without having to log in to Salesforce Maps Advanced.

Salesforce Meetings

Enhance your sales reps' interactions with prospects and customers with tools to prepare for meetings and increase attendee engagement. The Meeting Digest unifies information about who's in a meeting, shows relevant activities, and helps reps ensure that team members know the customer history going into a meeting. The Meeting Studio has a unique camera and presentation view to keep attendees engaged during virtual meetings.

Einstein Conversation Insights

Einstein Conversation Insights now includes transcripts for voice and video calls. Users can see conversation data in the activity timeline of related records. And users can receive custom coaching recommendations related to the activity in their customer conversations.

High Velocity Sales

Start selling faster with included sales cadences. Capture and assign new leads to sales cadences with a chatbot. Track engagement for multi-recipient emails. See call and email engagement for contacts on accounts. Snooze targets in sales cadences. And see prospects' sales cadence history.

Sales Cloud for Slack (Beta)

Help your sales team sell seamlessly, without leaving their conversations in Slack. Teams can access, update, and share records, manage their pipelines, and get important notifications about key accounts and opportunities—all directly from Slack.

Integration with Google

Engagement data includes replies, soft and hard bounces, and out-of-office replies for each recipient of an email sent from the Gmail integration with Inbox.

Integration with Microsoft

Reps who meet with customers using video conference in Microsoft Teams can pin and access Salesforce records and Salesforce Meetings during the video conference. Engagement data includes replies, soft and hard bounces, and out-of-office replies for each recipient of an email sent from the Outlook integration with Inbox. Lightning Sync customers who started their migration to Einstein Activity Capture can now turn off Lightning Sync for good. And Salesforce for Outlook is still scheduled for retirement in June 2023.

Revenue Intelligence

With Revenue Intelligence, sales teams can achieve sales targets, grow pipelines, and ensure forecast accuracy like never before. Revenue Intelligence is a data-driven sales solution that unites Tableau CRM dashboards and analytics with an easy to visualize pipeline progress flow chart in Pipeline Inspection.

Revenue Intelligence also includes Einstein Forecasting, Einstein Activity Capture, and more. Al, forecasting, and customer engagement features packed with customer data also help your sales team win deals with confidence.

Revenue Intelligence and its features are available for an extra cost. For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

Generate More Revenue and Build Stronger Pipelines with Revenue Insights

Use Revenue Insights to help sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue. See the broad strokes and the details using three embedded dashboards: Overview, Team Performance, and Sales Performance.

See Pipeline Changes in a Dynamic Chart

Pipeline Inspection users can see the changes to their pipeline from the Flow tab. This chart shows the changes to opportunities in different forecast categories over time. Users can filter results to see the data that's most useful to them.

Generate More Revenue and Build Stronger Pipelines with Revenue Insights

Use Revenue Insights to help sales teams gain performance insights to build stronger pipelines, improve forecast accuracy, and generate more revenue. See the broad strokes and the details using three embedded dashboards: Overview, Team Performance, and Sales Performance.

Where: This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To use the Revenue Insights dashboards, you need the Revenue Intelligence User permission set. To manage the Revenue Insights dashboards, you need the Revenue Intelligence Admin permission set.

Why: The Overview dashboard helps you see across your revenue performance and understand if you're meeting your targets. The Team Performance dashboard helps you pinpoint where team members can focus efforts to win more sales, and the Sales Performance dashboard helps you understand if sales are trending up or down.

How: To enable Revenue Insights, from Setup, in the Quick Find box, enter **Revenue Insights**, and then select **Revenue Insights Setup**. Complete the required setup steps. Enable Tableau CRM, and turn on Revenue Insights. Assign the Revenue Intelligence permission sets to the users who you want to have access to Revenue Insights.

IN THIS SECTION:

Understand Your Revenue Performance in a Snap with the Overview Dashboard

Get a comprehensive view of your revenue performance with the new Overview dashboard. Your most critical information is instantly available. Are you on track and meeting your quotas? The dashboard helps point to the areas to focus on, such as whether opportunities are moving to the next stage. Quickly determine whether sales are trending up or down with details such as average win rates, days to close, and average sales size.

Improve Team Productivity with the Team Performance Dashboard

Quickly identify coaching opportunities for managers and opportunities for representatives to improve performance. See details, such as the sales leader, average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products so you know where to focus your efforts.

See Your Bottom Line with the Sales Performance Dashboard

The Sales Performance dashboard shows how your sales are trending over time. Compare by product area, month, or quarter to see whether sales are trending up or down.

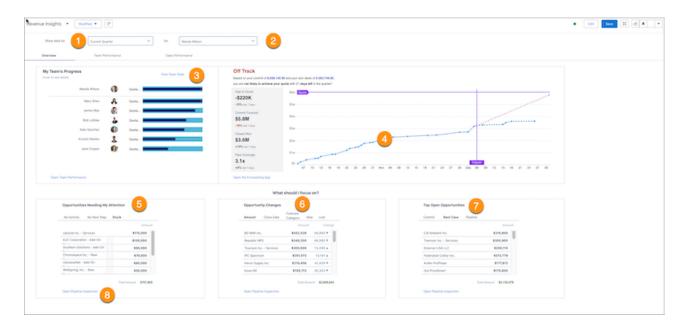
Understand Your Revenue Performance in a Snap with the Overview Dashboard

Get a comprehensive view of your revenue performance with the new Overview dashboard. Your most critical information is instantly available. Are you on track and meeting your quotas? The dashboard helps point to the areas to focus on, such as whether opportunities are moving to the next stage. Quickly determine whether sales are trending up or down with details such as average win rates, days to close, and average sales size.

Where: This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To use the Revenue Insights dashboards, you need the Revenue Intelligence User permission set. To manage the Revenue Insights dashboards, you need the Revenue Intelligence Admin permission set.

How: From Revenue Insights, select the **Overview** tab.



Specify a time period (1) and a team member (2). You can see quota attainment and whether you're on track for the specified period. Click **View Team Stats** to display detailed team statistics (3). Quota Attainment and On-Track or Off-Track metrics are updated in real time so you can make immediate decisions accurately. Hover over the graph to see details on each sale (4). See the areas to focus on via Opportunities Needing My Attention (5), such as Opportunity Changes (6), and Top Opportunities (7). Click Open Pipeline Inspection (8) to see more details about your pipeline.

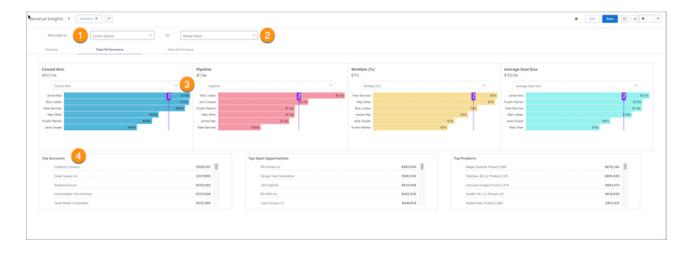
Improve Team Productivity with the Team Performance Dashboard

Quickly identify coaching opportunities for managers and opportunities for representatives to improve performance. See details, such as the sales leader, average win rate, open pipeline, and activities completed. It's easy to assess the top accounts, opportunities, and products so you know where to focus your efforts.

Where: This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To use the Revenue Insights dashboards, you need the Revenue Intelligence User permission set. To manage the Revenue Insights dashboards, you need the Revenue Intelligence Admin permission set.

How: From Revenue Insights, select the **Team Performance** tab.



Specify a time period (1) and a team (2). Use the drop-down menu (3) to select from multiple sales metrics and display three at a time. You can compare by various fields on the opportunity object. You can also view the top accounts, opportunities, and products (4).

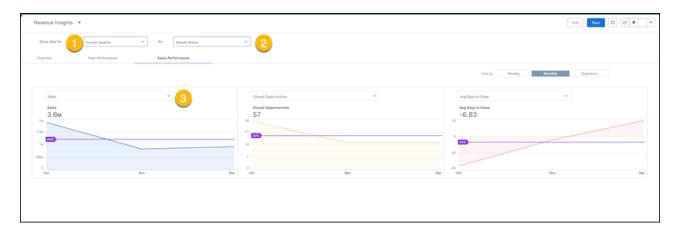
See Your Bottom Line with the Sales Performance Dashboard

The Sales Performance dashboard shows how your sales are trending over time. Compare by product area, month, or quarter to see whether sales are trending up or down.

Where: This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost

Who: To use the Revenue Insights dashboards, you need the Revenue Intelligence User permission set. To manage the Revenue Insights dashboards, you need the Revenue Intelligence Admin permission set.

How: From Revenue Insights, select the **Sales Performance** tab.



View details by specifying a time period (1) and a team member (2). Use the drop-down menu (3) to select from multiple sales metrics and display three at a time. You can compare by various fields on the opportunity object.

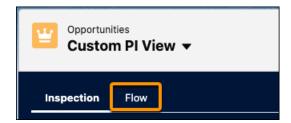
See Pipeline Changes in a Dynamic Chart

Pipeline Inspection users can see the changes to their pipeline from the Flow tab. This chart shows the changes to opportunities in different forecast categories over time. Users can filter results to see the data that's most useful to them.

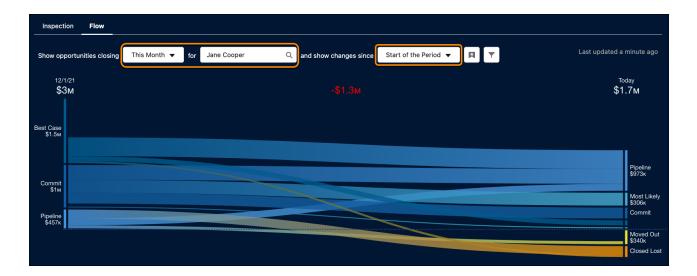
Where: This change applies to Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To access the Flow tab, users must have the Revenue Intelligence User or the Revenue Intelligence Admin permission set.

How: Access the chart from Pipeline Inspection by clicking the Flow tab.



The Pipeline Flow chart shows the change in opportunities in different forecast categories according to your filter criteria. To specify the opportunities that you want to focus on, use the filters for close date and user. And specify the time period that you want displayed in the chart.



The chart shows pipeline changes beginning from the date that you select to the present day. To highlight the changes related to that forecast category, click a band in the chart. The list below the chart also updates to show opportunities related to your selection.



The amounts displayed in the chart are individual forecast categories. The amounts aren't cumulative, unlike the aggregate metrics shown on the Inspection tab. The names of the forecast categories are defined by Salesforce, and sometimes they don't correspond precisely to the labels of the forecast categories in your org.

To access the Flow tab, enable the feature from the Pipeline Inspection page in Setup.

Pipeline Inspection

Get Al insights about opportunity progress, and engagement and activity details. See pipeline changes in a flow chart view. Edit opportunity fields inline while reviewing your pipeline.

IN THIS SECTION:

Get More Insights About Opportunity Progress in Pipeline Inspection

Sales teams can get Al-driven insights about when a deal isn't predicted to close and other factors that could influence the deal. And with metrics such as opportunity score tier, number of days past the close date, and days in stage, sales managers can coach reps to get deals back on track.

Get Activity and Engagement Details in Pipeline Inspection

Sales reps and managers can now dig in deep about how a deal is progressing. Insights related to activities help sales teams know what's been done and what's up next. And aggregate activity counts help sales managers understand deal activity.

See Pipeline Changes from the Flow Tab

Pipeline Inspection users can see the changes to their pipeline from the Flow tab. This chart shows the changes to opportunities in different forecast categories over time. Users can filter results to see the data that's most useful to them.

Edit Opportunity Fields Inline in Pipeline Inspection

Sales teams can keep their opportunities accurate by editing fields inline while they're reviewing their pipelines. If opportunities in the list are all of the same record type, multiple records can be edited at the same time.

Track Territory and Opportunity Team Progress in Pipeline Inspection

Sales reps and managers can now see the big picture by using filters to track territory, territory team, and opportunity team pipelines.

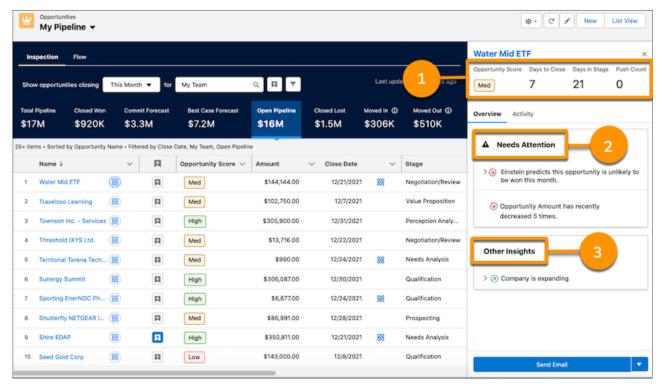
Get More Insights About Opportunity Progress in Pipeline Inspection

Sales teams can get Al-driven insights about when a deal isn't predicted to close and other factors that could influence the deal. And with metrics such as opportunity score tier, number of days past the close date, and days in stage, sales managers can coach reps to get deals back on track.

Where: This change applies to Pipeline Inspection, available at no cost in Performance and Unlimited editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

Who: To use Pipeline Inspection, users must have Pipeline Inspection or Revenue Intelligence permissions. When using Pipeline Inspection on Enterprise edition, users must have Revenue Intelligence permissions.

Why: Sales teams now get a deeper understanding of their opportunities.



Sales teams get a snapshot of opportunity metrics (1), essential insights that indicate a deal's likelihood of closing (2) and informational insights about the opportunity or its account (3).

How: When an opportunity has associated Al insights and close date predictions, they're displayed in a side panel. To open the panel, click next to the opportunity name.

To show your users the opportunity score tier and related insights, make sure to set up Einstein Opportunity Scoring. Set up Einstein Deal Insights in Pipeline Inspection so your users can see which opportunities scheduled to close this month are unlikely to be won during the same month. Also, when you set up Einstein Account Insights, your users get more of the informational insights.

SEE ALSO:

Get Activity and Engagement Details in Pipeline Inspection

Salesforce Help: Set Up Einstein Opportunity Scoring for Sales Cloud Users

Salesforce Help: Set Up Einstein Deal Insights in Pipeline Inspection

Salesforce Help: Enable Einstein Account Insights

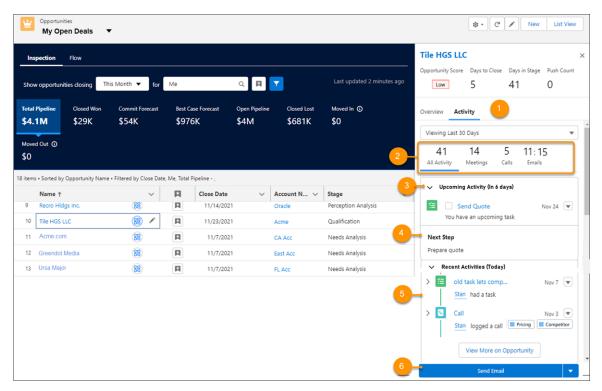
Get Activity and Engagement Details in Pipeline Inspection

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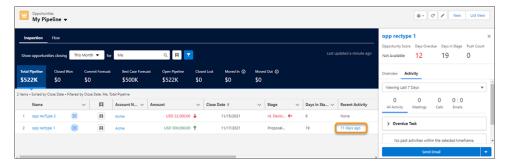
Who: To use Pipeline Inspection, users must have Pipeline Inspection or Revenue Intelligence permissions. When using Pipeline Inspection on Enterprise edition, users must have Revenue Intelligence permissions.

Why: Details about past and upcoming activity make it easier for sales reps and managers to track the progress of a deal and keep it moving forward.



When you enable Activity Metrics with Einstein Activity Capture, the Activity tab (1) shows sales teams the total number of activities or activities broken down by type (2). See what activity is coming up (3) and the next step (4). Plus, review past activity along with relevant insights (5). Finally, take immediate action, for example, by sending an email (6).

How: To see activity details for the opportunity, click the value in the Recent Activity field.



SEE ALSO:

Get More Insights About Opportunity Progress in Pipeline Inspection

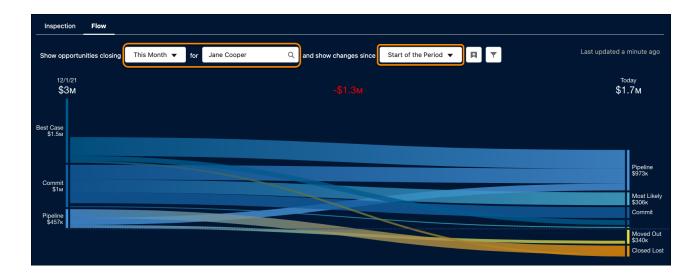
See Pipeline Changes from the Flow Tab

Pipeline Inspection users can see the changes to their pipeline from the Flow tab. This chart shows the changes to opportunities in different forecast categories over time. Users can filter results to see the data that's most useful to them.

Where: This change applies to Lightning Experience. The Flow tab in Pipeline Inspection is available with Revenue Intelligence, which is available for an extra cost in Enterprise and Unlimited editions.

Who: To access the Flow tab, users must have the Revenue Intelligence User or the Revenue Intelligence Admin permission set.

How: Access the chart from Pipeline Inspection by clicking the Flow tab. To see and analyze pipeline changes over time, use the Pipeline Flow chart.



For more information, check out the See Pipeline Changes in a Dynamic Chart topic in the Revenue Insights section.

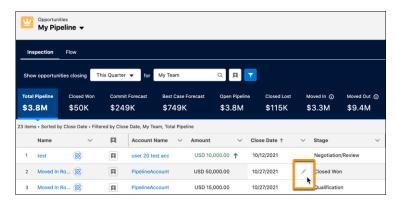
Edit Opportunity Fields Inline in Pipeline Inspection

Sales teams can keep their opportunities accurate by editing fields inline while they're reviewing their pipelines. If opportunities in the list are all of the same record type, multiple records can be edited at the same time.

Where: This change applies to Pipeline Inspection, available at no cost in Performance and Unlimited editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

Who: To use Pipeline Inspection, users must have Pipeline Inspection or Revenue Intelligence permissions. When using Pipeline Inspection on Enterprise edition, users must have Revenue Intelligence permissions.

How: To edit an opportunity field, hover over the field. Similar to other list views, a pencil appears if the field is editable.



SEE ALSO:

Salesforce Help: Managing Pipelines with Pipeline Inspection (Right-click to view in a new tab or window.) Salesforce Help: Guidelines and Limits for Pipeline Inspection (Right-click to view in a new tab or window.)

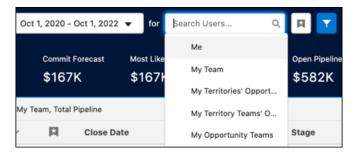
Track Territory and Opportunity Team Progress in Pipeline Inspection

Sales reps and managers can now see the big picture by using filters to track territory, territory team, and opportunity team pipelines.

Where: This change applies to Pipeline Inspection, available at no cost in Performance and Unlimited editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

Who: To use Pipeline Inspection, users must have Pipeline Inspection or Revenue Intelligence permissions. When using Pipeline Inspection on Enterprise edition, users must have Revenue Intelligence permissions.

How: To filter by territory, territory team, or opportunity team, use the quick filter dropdown list.



SEE ALSO:

Salesforce Help: Managing Pipelines with Pipeline Inspection (Right-click to view in a new tab or window.)

Core Sales Features

Enjoy an improved setup experience for Collaborative Forecasts. Exclude specific accounts from territory assignment rules and track changes to assignments. When using products, new sharing methods introduced in release updates help protect your product data.

IN THIS SECTION:

Collaborative Forecasts

Enjoy an improved setup experience. Easily add key performance indicators (KPIs) to the forecasting grid. See recent changes to forecasting categories.

Enterprise Territory Management

Control territory assignments for select accounts, know when changes to territory assignments occur, and track when assignment jobs start and end programmatically.

Products

Use new sharing methods introduced in release updates that help protect your product data.

Collaborative Forecasts

Enjoy an improved setup experience. Easily add key performance indicators (KPIs) to the forecasting grid. See recent changes to forecasting categories.

IN THIS SECTION:

Experience a More Efficient Collaborative Forecasts Setup

Now available in Lightning Experience only, Forecasts Settings has a whole new look and feel. We brought Forecast Types and Forecasts Settings together so that you get everything on one page. And we added a range of resources to help you get started. Setup's never been easier.

Get Insights from Core Forecasting KPIs Quickly

Now you can include columns in your forecasting grid that calculate Gap to Quota and Pipeline Coverage metrics automatically. We simplified the process by providing two ready-to-use calculated columns. Calculating forecasting metrics manually can be time-consuming and subject to user error.

See Recent Changes in Forecast Categories

As a sales leader, you don't want to be caught unaware of changes in your team's forecast. Now you can see week-over-week changes for each of the forecast categories so that you can adjust your sales and forecasting strategies accordingly.

Choose Which Opportunity RecordTypes to Include or Exclude from Your Forecasts

Now your sales team can filter by RecordType field Opportunity. With Custom Filters, you can control which opportunities to include or exclude from forecasting.

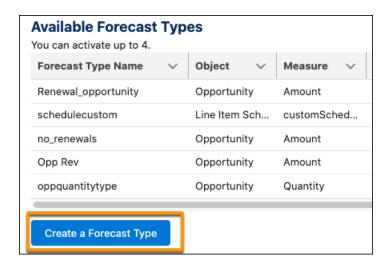
Experience a More Efficient Collaborative Forecasts Setup

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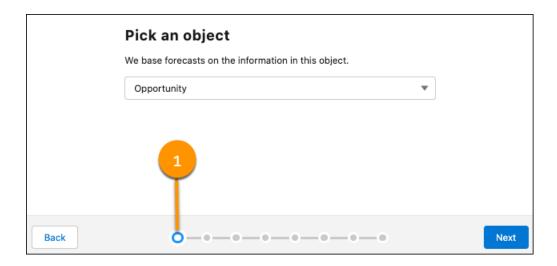
Where: This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: We added the capability to create Forecast Types directly from the Setup UI. Commonly used settings such as manager and owner adjustments are selected by default. A setup flow, introduced in Summer '21, helps you create forecast types step by step. And the updated design and text help you select the settings. From how you want to measure data, to whether you want to filter your forecasting data, the setup flow provides settings that reflect your business practices.

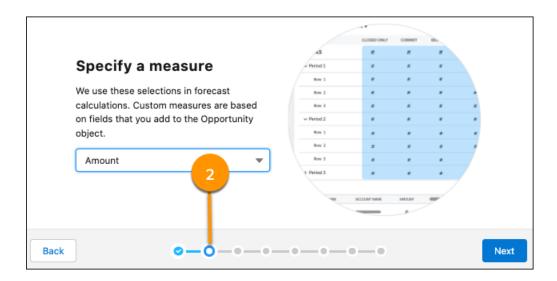
How: To launch a setup flow, from Forecast Settings, click **Create a Forecast Type**.



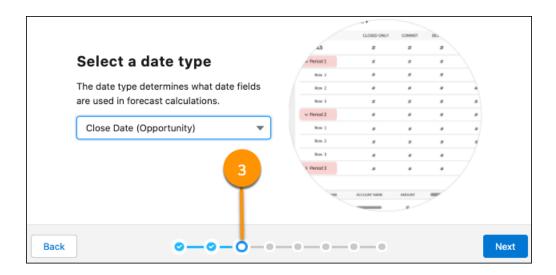
The setup flow consists of multiple pages.



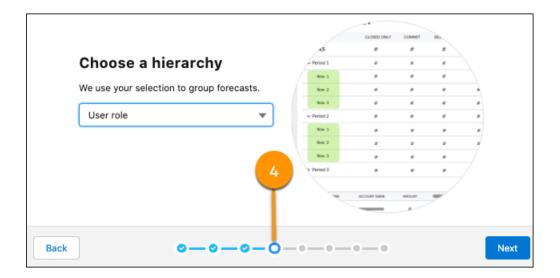
Select the Object of the Forecast Type



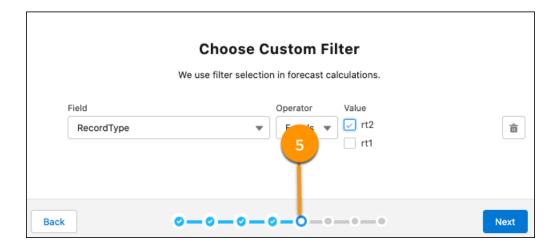
Specify a Measure



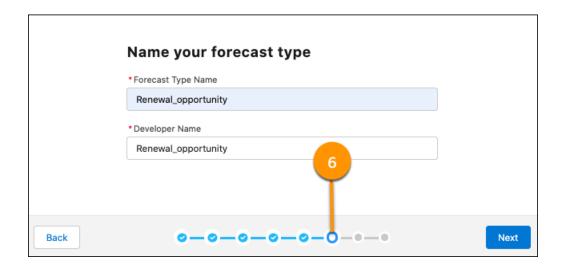
Select a Date Type



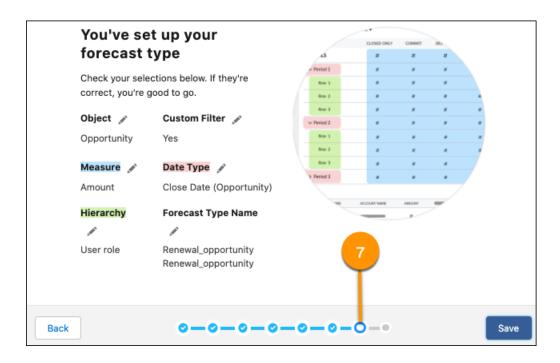
Select a Hierarchy



Set Custom Filter Condition Logic



Name the Forecast Type



Summary Description of Forecast Type

SEE ALSO:

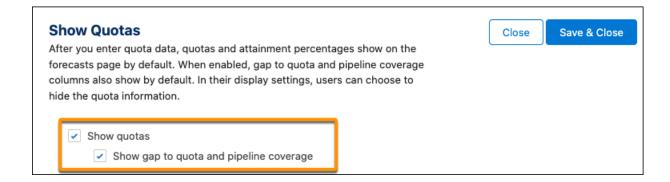
Salesforce Help: Turn On Collaborative Forecasts and Define Forecasts Settings (Right-click to view in a new tab or window.)

Get Insights from Core Forecasting KPIs Quickly

Now you can include columns in your forecasting grid that calculate Gap to Quota and Pipeline Coverage metrics automatically. We simplified the process by providing two ready-to-use calculated columns. Calculating forecasting metrics manually can be time-consuming and subject to user error.

Where: This change applies to Sales Cloud in Lightning Experience in Performance, Unlimited, Enterprise, and Developer editions with Forecasting turned on.

How: Through the setup process, an admin can configure Forecasting to provide Gap To Quota and Pipeline Coverage calculations.



When enabled, the Gap To Quota and Pipeline Coverage columns show on the Forecasts page.



The Gap To Quota column lets your sales team know at a glance how close they're to achieving their quota, without them calculating the gap manually. The column calculates the Gap To Quota metric automatically by subtracting the closed sales amount from your sales quota.

The Pipeline Coverage column lets your sales team know the ratio of opportunities in the sales pipeline over your sales team's Gap to Quota. The ratio shows the sales team how much pipeline remains, compared to how much quota they must close.

Having quick and easy access to the Pipeline Coverage allows sales managers to know where to focus their sales reps.

SEE ALSO:

Salesforce Help: Adjust Forecasts in Collaborative Forecasts (Right-click to view in a new tab or window.)
Salesforce Help: Managing Quotas in Collaborative Forecasts (Right-click to view in a new tab or window.)

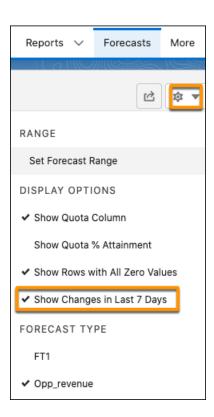
See Recent Changes in Forecast Categories

As a sales leader, you don't want to be caught unaware of changes in your team's forecast. Now you can see week-over-week changes for each of the forecast categories so that you can adjust your sales and forecasting strategies accordingly.

Where: This change applies to Sales Cloud in Lightning Experience in Performance, Unlimited, Enterprise, and Developer editions with Forecasting turned on.

How: To see the option to enable this feature, enable historical trending for forecasting items, and verify that you received email confirmation that your historical trending data is ready.

After the trending data is ready, go to the Forecasts page and click the gear in the upper right. Under Display Options, select **Show Changes in Last 7 Days**.



When enabled, you see the changes that you make to any of the forecasts.

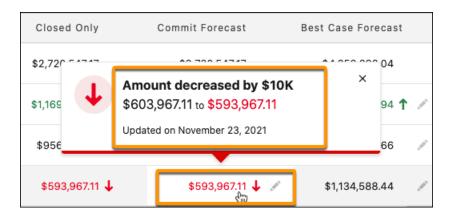


Note: Sometimes the changes don't appear until the next day.

An icon indicates the categories in your forecasts that changed in the last 7 days.



To see the details of the change, hover over a cell.



SEE ALSO:

Salesforce Help: Adjust Forecasts in Collaborative Forecasts (Right-click to view in a new tab or window.)
Salesforce Help: Set Up Historical Trend Reporting (Right-click to view in a new tab or window.)

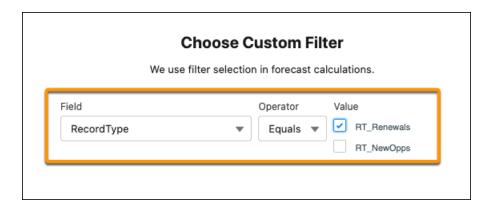
Choose Which Opportunity RecordTypes to Include or Exclude from Your Forecasts

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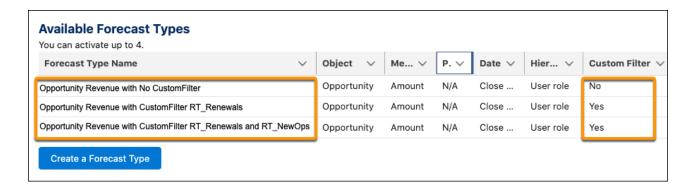
Where: This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: We added a Custom Filter page to the Create a Forecast Type setup flow. You use the Custom Filter page to set the filter condition logic for the Forecast Type. Filtering by Record Type allows you to roll up a separate forecast by record-type.

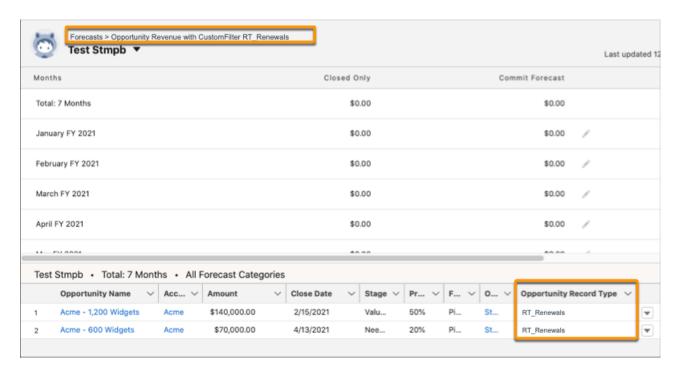
A common use case for this kind of filtering is to roll up separate forecasts for New Opportunities versus Renewals.



Each Forecasting Type can have a custom filter associated with it.



The Custom Filter set by the admin is applied when a user selects the forecast type from the forecast page.



SEE ALSO:

Salesforce Help: Forecast Types in Collaborative Forecasts (Right-click to view in a new tab or window.)

Enterprise Territory Management

Control territory assignments for select accounts, know when changes to territory assignments occur, and track when assignment jobs start and end programmatically.

IN THIS SECTION:

Exclude Specific Accounts from Territory Assignment Rules

Preserve territory assignments for selected accounts when you run assignment rules in Enterprise Territory Management. For example, within California, you have several accounts that must remain with their existing sales team and territory due to customer preference.

Track Changes to Territory Assignments

Use the ObjectTerritory2Association object to find out whether territory assignments were updated or deleted. This change is helpful if you want to trigger subsequent processes, such as account owner reevaluation, based on territory assignment changes in Enterprise Territory Management.

Get Status of Territory Assignment Rule Jobs Programmatically

Get notified of assignment rule job status in downstream applications by using the Territory2AlignmentLog object and the Salesforce enterprise messaging platform. Previously, Enterprise Territory Management job status was available only in Background Jobs in Setup.

Exclude Specific Accounts from Territory Assignment Rules

Preserve territory assignments for selected accounts when you run assignment rules in Enterprise Territory Management. For example, within California, you have several accounts that must remain with their existing sales team and territory due to customer preference.

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: Using the Territory2ObjectExclusion object, add a list of records that include the account and territory IDs you want to exclude from territory assignment rules. The next time you run the territory assignment rules, these accounts aren't assigned to identified territories even when the accounts meet the assignment rule criteria.

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: Territory2ObjectExclusion (Right-click to view in a new tab or window.)
Salesforce Help: Run Assignment Rules for a Territory
New and Changed Objects

Track Changes to Territory Assignments

Use the ObjectTerritory2Association object to find out whether territory assignments were updated or deleted. This change is helpful if you want to trigger subsequent processes, such as account owner reevaluation, based on territory assignment changes in Enterprise Territory Management.

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: Use a getUpdated() or getDeleted() call with the ObjectTerritory2Association object to get a list of records that were updated (added or changed) or deleted within a timespan.

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: ObjectTerritory2Association (Right-click to view in a new tab or window.)

SOAP API Developer Guide: getUpdated()

SOAP API Developer Guide: getDeleted()

New and Changed Objects

Get Status of Territory Assignment Rule Jobs Programmatically

Get notified of assignment rule job status in downstream applications by using the Territory2AlignmentLog object and the Salesforce enterprise messaging platform. Previously, Enterprise Territory Management job status was available only in Background Jobs in Setup.

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: Using the enterprise messaging platform, subscribe to territory assignment rule job start and end events from your downstream applications or processes. Use those events as a trigger to start subsequent processes. Assignment rule job start and end events are also records in the Territory2AlignmentLog object, which you can query.

SEE ALSO:

Object Reference for Salesforce and Lightning Platform: Territory2AlignmentLog (Right-click to view in a new tab or window.)

Platform Events Developer Guide: Change Data Capture Events

Salesforce Help: Monitoring Background Jobs

New and Changed Objects

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 Winter '23, in new orgs only, the update sets 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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23. The Spring '22 enforcement date shown in the UI is incorrect.

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. Note that while sharing is supported for guest users, it's not supported for internal or external users. This update was first made available in Winter '22 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22. The Spring '22 enforcement date shown in the UI is incorrect.

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

When: This update is postponed to 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: 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.

- Review the sharing settings. From Setup, in the Quick Find box, 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

Salesforce Help: Organization-Wide Sharing Defaults (Right-click to view in a new tab or window.)

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. Note that while sharing is supported for guest users, it's not supported for internal or external users. This update was first made available in Winter '22 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22. The Spring '22 enforcement date shown in the UI is incorrect.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, 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.

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 Summer '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 Spring '22. It will be applied in Summer '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

Salesforce Help: Secure Guest Users' Sharing Settings and Record Access (Right-click to view in a new tab or window.)

Sales Enablement (myTrailhead)

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

IN THIS SECTION:

myTrailhead Is Now Part of Sales Enablement

Your company's enablement experience has a new name and some new terminology. To align with the announcement that myTrailhead is rolling into a new solution called Sales Enablement, we're updating some parts of your existing setup and publishing workflow.

Preview Modules from Your Trailmaker Content Workspace

Help your company prepare and publish content for your enablement site more efficiently. In the Trailmaker Content app, you can preview content that you're working on in your local workspace—without adding it to a release first. And you can easily share the preview with other collaborators, who don't require any extra permissions to access it. This content preview complements the existing full release preview that's launched from the Trailmaker Release app. This enhancement ensures that your content creators and collaborators have multiple opportunities to validate and inspect content before publication.

View and Download Published Content More Efficiently

The Trailmaker Release app now provides a tabbed and paginated user experience for viewing your enablement site's releases and published content. You can also download ZIP files of published content—known as backpacks—directly from Trailmaker Release. This enhancement provides a simpler path for content creators to access the latest version of released content.

myTrailhead Is Now Part of Sales Enablement

Your company's enablement experience has a new name and some new terminology. To align with the announcement that myTrailhead is rolling into a new solution called Sales Enablement, we're updating some parts of your existing setup and publishing workflow.

Where: This change applies to Sales Enablement (myTrailhead), which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This change is effective February 2022.

How: These terms have changed.

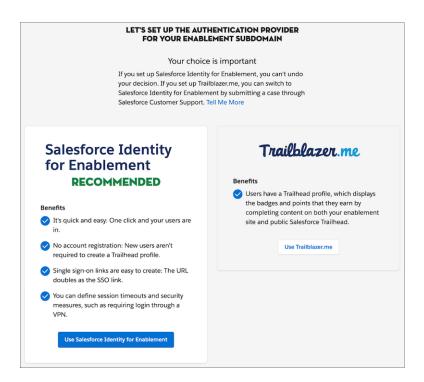
Previous	Current	Meaning
myTrailhead	Sales Enablement	The license assigned to users, and the group of features that allow your company to publish content and manage access to that content.
myTrailhead subdomain	enablement site	The website where your content is published, such as https://your-company.my.trailhead.com/. We still use subdomain to refer to the part of the website URL that's specific to your company.
Salesforce Identity for myTrailhead (SIFM)	Salesforce Identity for Enablement	An authentication provider for logging in users to your enablement site.

The new terms appear in labels in the Trailmaker Content, Trailmaker Release, and Trailmaker Settings apps, such as:

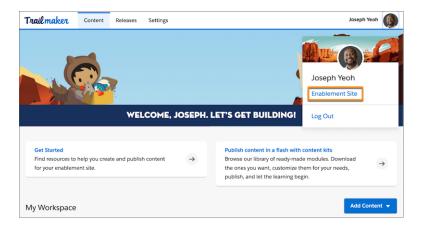
The web page where you create a subdomain and content collection for your enablement site.

NEW SUBDOMAIN Let's create the subdomain name and the first content collection for your enablement site. Your subdomain name must meet these Subdomain requirements. .my.trailhead.com purealoe Must be unique · Must be all lowercase Content Collection Must be between 4 and 29 characters All Employees · Can include only letters, numbers, hyp underscores · Must start and end with a letter or num · Can't include letters with diacritics, suc Done

• The web page where you select and configure the authentication provider for your enablement site.



The link to the user menu for navigating from Trailmaker to the live production environment for your content.



As we continue updating terms, you still see myTrailhead and subdomain in these locations:

- myTrailhead pages in Setup, including the Content Permissions Assistant and Content Collections list views
- myTrailhead permission set license
- myTrailhead system permissions
- myTrailhead help
- myTrailhead content on Trailhead

SEE ALSO:

Salesforce Help: Sales Enablement (myTrailhead)

Salesforce Help: Terminology Changes from myTrailhead to Sales Enablement

Preview Modules from Your Trailmaker Content Workspace

Help your company prepare and publish content for your enablement site more efficiently. In the Trailmaker Content app, you can preview content that you're working on in your local workspace—without adding it to a release first. And you can easily share the preview with other collaborators, who don't require any extra permissions to access it. This content preview complements the existing full release preview that's launched from the Trailmaker Release app. This enhancement ensures that your content creators and collaborators have multiple opportunities to validate and inspect content before publication.

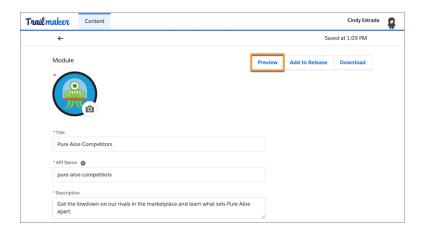
Where: This change applies to Sales Enablement (myTrailhead), which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This enhancement is available in February 2022.

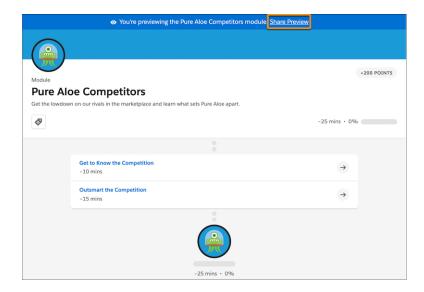
Who: This ability to launch and share a content preview is available for users with the myTrailhead Content Creation permission. The ability to access a shared preview is available to anyone who can access the preview link.

Why: Previously, content creators could preview content only by adding it to a release and viewing the full release preview. The release preview showed all new and changed content planned for the release, along with all content already published for the content collection where the release was created. Only users with the myTrailhead Preview Mode permission could access the release preview.

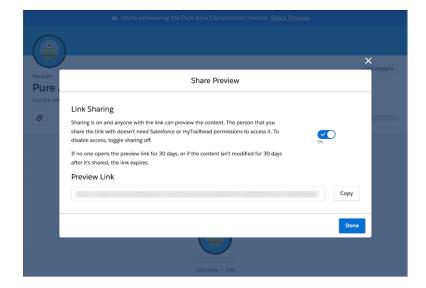
How: In Trailmaker Content, click **Preview** on the module or unit page.



To share the preview with other collaborators, click **Share Preview** in the preview banner.



In the Share preview window, you toggle sharing and copy the preview link.



The full release preview remains available from Trailmaker Release. To access the full release preview, users still require the appropriate system permission. To remove ambiguity with the Trailmaker Content preview, the myTrailhead Preview Mode permission has been renamed to myTrailhead Preview Release. If you had the myTrailhead Preview Mode permission enabled, you now have the myTrailhead Preview Release permission enabled.

SEE ALSO:

Salesforce Help: Preview Modules from Your Trailmaker Content Workspace Salesforce Help: Preview a Release in Trailmaker Release Salesforce Help: Enablement Site Permissions List

View and Download Published Content More Efficiently

The Trailmaker Release app now provides a tabbed and paginated user experience for viewing your enablement site's releases and published content. You can also download ZIP files of published content—known as backpacks—directly from Trailmaker Release. This enhancement provides a simpler path for content creators to access the latest version of released content.

Where: This change applies to Sales Enablement (myTrailhead), which is available to customers with Enterprise, Performance, or Unlimited editions.

When: This enhancement is available in February 2022.

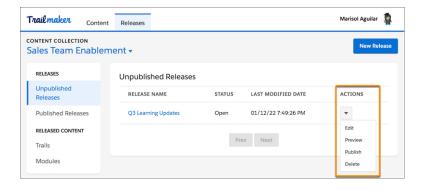
Who: This enhancement is available for users with the myTrailhead Release Management permission.

Why: Previously, the Trailmaker Release app provided only lists of unpublished and published releases, with no easy way to view an inventory of published content. To download backpacks of published content, it was necessary for your local Trailmaker Content workspace to contain the same version of the content published in a release. Then, you could download the backpack only from Trailmaker Content.

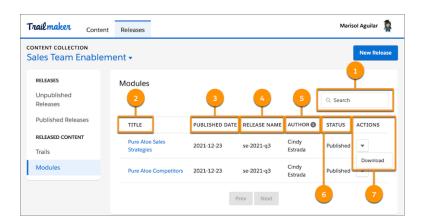
How: The Trailmaker Release app now contains tabs for unpublished releases, published releases, released trails, and released modules.



On the Unpublished Releases tab, view the list of releases, and use the options in the Actions dropdown to edit, preview, publish, or delete the release.



On the Published Releases tab, view the list of releases, and use the option in the Actions dropdown to view a release's details. On the Trails tab or Modules tab, view the list of released trails or modules.



You can search (1) the list by content title. For each trail or module in the list, you can:

- View the title, and click to navigate to the published content on your enablement site (2). If the content's Status is Archived, the link isn't available.
- View the date when the content was published (3).
- View the name of the release that published the content (4).
- View the name of the user who added the content to the release (5).
 - Note: The Author column shows data only for content that you publish after this enhancement becomes available. For content published before this enhancement, the Author column doesn't show any data.
- View the status of the content: Published or Archived (6).
- Download the content's backpack (7). You can download the backpack for any content that you released, even content published before this enhancement became available.

You can still download backpacks from Trailmaker Content for content in your local workspace.

SEE ALSO:

Salesforce Help: Download a Backpack from Trailmaker Release

Salesforce Help: Download a Backpack from Trailmaker Content

Salesforce Help: Manage Releases with the Trailmaker Release App

Productivity Features

Change the time frame used to capture emails for Einstein Activity Capture users. Inbox users can specify more granular settings for list emails. Create more engaging email content with Email Template Builder. See voice and video calls in the activity timeline.

IN THIS SECTION:

Einstein Activity Capture

Change the time frame used to capture emails. Review the advanced settings when you create a configuration. Decide whether sensitive emails are shared with other users. Use new activity metric fields. Finish your migration from Lightning Sync.

Email Experience

Inbox users can specify more granular settings for list emails. A new list email report type gives you more insight into how effective your list emails are.

Email Templates

Create more engaging email content with custom components in email templates created with Email Template Builder.

Activities

We enhanced the activity timeline with voice and video calls, along with ways to filter those event types and get more details about them without leaving the activity timeline. There's also a new way to sort past activities, by the completed date instead of the due date.

Salesforce Inbox

Salesforce Inbox integrates email and calendars with Salesforce so your sales reps can manage their sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

WDC (Legacy Work.com)

WDC is retiring in Spring '22.

Einstein Activity Capture

Change the time frame used to capture emails. Review the advanced settings when you create a configuration. Decide whether sensitive emails are shared with other users. Use new activity metric fields. Finish your migration from Lightning Sync.

IN THIS SECTION:

Change the Time Frame Used When Emails Are Initially Added to the Activity Timeline

When users first connect their account to Salesforce, you can decide how far back in time their emails go when they're added to the activity timeline. You can reduce the default, which is 180 days, for more control of how Einstein Activity Capture handles users' data. We also updated the labels for the events filter to clarify the behavior.

Review All Einstein Activity Capture Settings When Creating a Configuration

We moved some things around so that you can review all the Einstein Activity Capture settings before the configuration takes effect. Now when you create a configuration, a new step shows you the advanced settings. Previously, to get to the advanced settings, you saved the configuration first and then edited it.

Decide Whether to Share Sensitive Emails with Other Users

When automated email replies and emails with sensitive content are added to the activity timeline, you can decide whether the emails keep the sharing setting that the admin or user set. By default, Einstein Activity Capture attempts to protect users from inadvertently sharing sensitive emails by setting the email to Don't Share.

See Activity Metrics Data for Emails Sent and Received

When using Activity Metric fields to analyze activity data, sales managers can now get a better understanding of their teams' email activity. Two new fields, Last Email Sent Date and Last Email Received Date, are available to use everywhere Activity Metrics fields are supported: list views, page layouts, reports, and more.

Delete Accounts Connected to Einstein Activity Capture

Einstein Activity Capture users can now delete accounts that they no longer want connected to Salesforce. Previously, they could only disconnect accounts.

Finish Your Move from Lightning Sync

If you already migrated your Lightning Sync settings to Einstein Activity Capture and are ready to stop using Lightning Sync, you can now turn it off.

Log In to Google Again to Continue Syncing Contacts

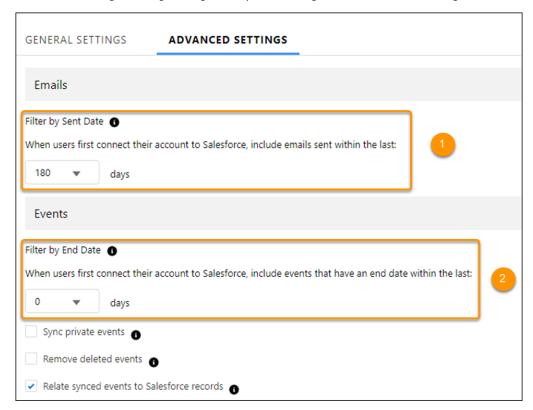
Einstein Activity Capture starts syncing contacts between Salesforce and Google using Google People API instead of legacy Google Contacts API. To avoid a contact sync interruption, affected users are prompted to reconnect their Google account.

Change the Time Frame Used When Emails Are Initially Added to the Activity Timeline

When users first connect their account to Salesforce, you can decide how far back in time their emails go when they're added to the activity timeline. You can reduce the default, which is 180 days, for more control of how Einstein Activity Capture handles users' data. We also updated the labels for the events filter to clarify the behavior.

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

How: When creating or editing a configuration, you can change the email and event settings.



To adjust how far back in time to capture emails when users first connect their account to Salesforce, use the Filter by Sent Date option (1). To adjust how far back in time to sync and capture events, use the Filter by End Date option (2).

SEE ALSO:

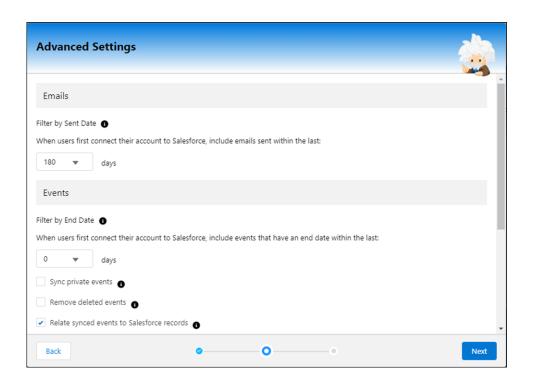
Salesforce Help: Create a Configuration for Einstein Activity Capture (Right-click to view in a new tab or window.)
Salesforce Help: Data Retention for Einstein Activity Capture (Right-click to view in a new tab or window.)

Review All Einstein Activity Capture Settings When Creating a Configuration

We moved some things around so that you can review all the Einstein Activity Capture settings before the configuration takes effect. Now when you create a configuration, a new step shows you the advanced settings. Previously, to get to the advanced settings, you saved the configuration first and then edited it.

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

How: When you create a configuration, the advanced settings step is part of the flow.



SEE ALSO:

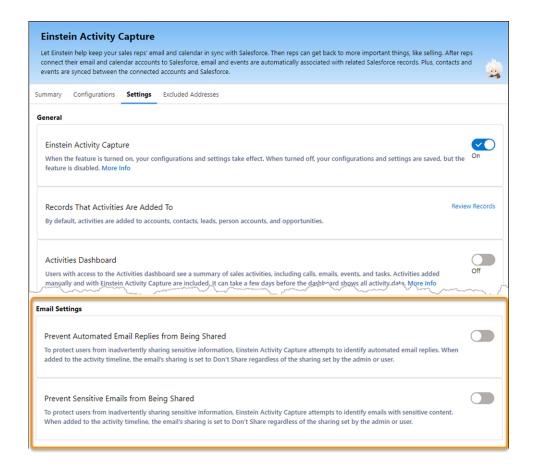
Salesforce Help: Create a Configuration for Einstein Activity Capture (Right-click to view in a new tab or window.)

Decide Whether to Share Sensitive Emails with Other Users

When automated email replies and emails with sensitive content are added to the activity timeline, you can decide whether the emails keep the sharing setting that the admin or user set. By default, Einstein Activity Capture attempts to protect users from inadvertently sharing sensitive emails by setting the email to Don't Share.

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

How: From the Einstein Activity Capture settings, go to the Settings tab. The settings, which prevent automated email replies and sensitive emails from being shared, are on by default, but you can turn them off.



SEE ALSO:

Salesforce Help: Set Default Activity Sharing for Einstein Activity Capture Users (Right-click to view in a new tab or window.)

See Activity Metrics Data for Emails Sent and Received

When using Activity Metric fields to analyze activity data, sales managers can now get a better understanding of their teams' email activity. Two new fields, Last Email Sent Date and Last Email Received Date, are available to use everywhere Activity Metrics fields are supported: list views, page layouts, reports, and more.

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

Who: You must have at least one Einstein Activity Capture user through Inbox, Sales Cloud Einstein, or High Velocity Sales. Then, all Salesforce users in your company can use the activity metrics fields.

How: Add the Last Email Sent Date and Last Email Received Date fields to list views, page layouts, reports, triggers, and processes. The fields are also available with API version 54.0.

SEE ALSO:

Salesforce Help: Activity Metrics (Right-click to view in a new tab or window.)

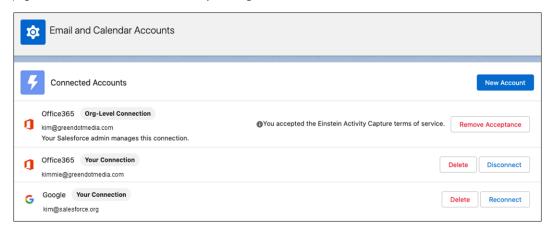
SOAP API Developer Guide: ActivityMetric (Right-click to view in a new tab or window.)

Delete Accounts Connected to Einstein Activity Capture

Einstein Activity Capture users can now delete accounts that they no longer want connected to Salesforce. Previously, they could only disconnect accounts.

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

How: Einstein Activity Capture users can go to Connected Accounts in their personal settings. From the Email and Calendar Accounts page, users can delete accounts that they no longer want connected to Salesforce.



SEE ALSO:

Salesforce Help: Connect Your Email and Calendar to Salesforce with Einstein Activity Capture (Right-click to view in a new tab or window.)

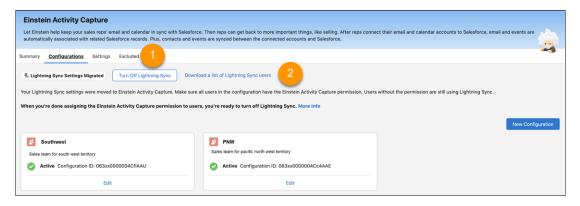
Finish Your Move from Lightning Sync

If you already migrated your Lightning Sync settings to Einstein Activity Capture and are ready to stop using Lightning Sync, you can now turn it off.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited 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: It's easy to turn off Lightning Sync.



From the Einstein Activity Capture settings page, turn off Lightning Sync (1). Make sure that all users who must sync contacts and events have access to Einstein Activity Capture. If needed, download a list of users who are still using Lightning Sync (2).

SEE ALSO:

Salesforce Help: Move from Lightning Sync to Einstein Activity Capture (Right-click to view in a new tab or window.)

Log In to Google Again to Continue Syncing Contacts

Einstein Activity Capture starts syncing contacts between Salesforce and Google using Google People API instead of legacy Google Contacts API. To avoid a contact sync interruption, affected users are prompted to reconnect their Google account.

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

When: Starting in January 2022, impacted users see a message in Salesforce to reconnect their Google account. Users must log in before Spring '22 is released to their org to avoid a contact sync interruption.

Who: Only Einstein Activity Capture users who see the message to reconnect their Google account are affected by this change.

How: Users who must reconnect their Google account are shown a message with a link to the Email and Calendar Accounts page in their personal settings. A user sees the message on all Salesforce pages until the user reconnects.

SEE ALSO:

Knowledge Article: Update Your Einstein Activity Capture or Lightning Sync for Google Settings Before Spring '22 Salesforce Help: Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox (Right-click to view in a new tab or window.)

Email Experience

Inbox users can specify more granular settings for list emails. A new list email report type gives you more insight into how effective your list emails are.

IN THIS SECTION:

Adjust List Email Settings for Inbox Users

Users with Inbox can adjust their list email send settings in Salesforce, including the display name and return address. Recipients are more likely to open an email from an individual or group that they recognize is from your company. Previously, Inbox users couldn't access these settings.

Analyze List Email Performance with Custom Reports

Your sales managers want to keep tabs on how effective a list email strategy is and which reps send the most impactful emails. To help them find this information and more, use the new list emails custom report.

Verify Your Email Address to Send Email Through Salesforce

Salesforce requires that you use a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were created and verified before the current verification process was established. If you send an email from an email address created before the current verification process, you receive an email message asking you to click a link and verify that you own the email address. We only send this message one time per release cycle.

Adjust List Email Settings for Inbox Users

Users with Inbox can adjust their list email send settings in Salesforce, including the display name and return address. Recipients are more likely to open an email from an individual or group that they recognize is from your company. Previously, Inbox users couldn't access these settings.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

How: To show recipients who an email is from or to direct replies to a certain mailbox, change the email sender name and return email address to a specific user or company department. From your personal settings, in the Quick Find box, enter *My Email Settings*, and then select **My Email Settings**.



Note: A verification email is sent to that mailbox before the change takes effect.



SEE ALSO:

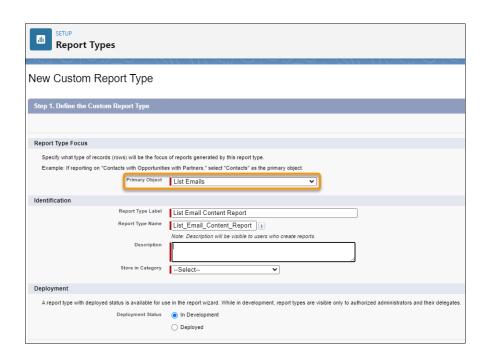
Salesforce Help: Salesforce Inbox (Right-click to view in a new tab or window.)

Analyze List Email Performance with Custom Reports

Your sales managers want to keep tabs on how effective a list email strategy is and which reps send the most impactful emails. To help them find this information and more, use the new list emails custom report.

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

How: On the Report Types page in Setup, create a custom report type using List Emails as the primary object.



SEE ALSO:

Salesforce Help: Report on List Email Messages (Right-click to view in a new tab or window.)

Verify Your Email Address to Send Email Through Salesforce

Salesforce requires that you use a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were created and verified before the current verification process was established. If you send an email from an email address created before the current verification process, you receive an email message asking you to click a link and verify that you own the email address. We only send this message one time per release cycle.

When: We plan to prevent sends from any email address without updated verification tracking by the start of the Winter '23 release.

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

Email Templates

Create more engaging email content with custom components in email templates created with Email Template Builder.

IN THIS SECTION:

Create Custom Components for Email Template Builder

With custom components, you can help marketers and managers create more engaging email content for their customers.

Create Custom Components for Email Template Builder

With custom components, you can help marketers and managers create more engaging email content for their customers.

Where: This change applies to Lightning Experience in 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 Template Builder.

How: To configure a custom component to use in the Email Template Builder, define the metadata in *<component>.js-meta.xml*. Define a *lightningStatic Email* target, and set *<isExposed>* to *true*.

Prepare the metadata package, and deploy it to a test org.

SEE ALSO:

Salesforce Help: Using Custom Components in Pardot Email (Right-click to view in a new tab or window.)

Activities

We enhanced the activity timeline with voice and video calls, along with ways to filter those event types and get more details about them without leaving the activity timeline. There's also a new way to sort past activities, by the completed date instead of the due date.

IN THIS SECTION:

Learn More About Voice and Video Calls in the Activity Timeline

Voice and video calls now appear in the activity timeline, giving your salespeople more information about the history of an account, opportunity, contact, or lead. The activity timeline entry shows attendees and a link to the transcript, part of Einstein Conversation Insights Enhancements. It also shows Einstein Call Insights with links to where the insights occur in the call transcript.

See More Filtering Choices in the Activity Timeline

Your sales team can filter by the voice and video calls available with Einstein Conversation Insights.

Skim More Info in the Streamlined Activity Timeline

An updated insights toggle, a new look for insights, and voice and video events that include Einstein Conversation Insights give your users more info than ever at their fingertips in the activity timeline.

Sort Past Activities by the Completed Date

You can sort past activities by the date they were completed. Previously, they were sorted by the due date, which gives incomplete info about when something happened. For example, an event is often completed on a different day than when it was due. Now the ambiguity is gone and your reps know when an activity was actually completed.

Learn More About Voice and Video Calls in the Activity Timeline

Voice and video calls now appear in the activity timeline, giving your salespeople more information about the history of an account, opportunity, contact, or lead. The activity timeline entry shows attendees and a link to the transcript, part of Einstein Conversation Insights Enhancements. It also shows Einstein Call Insights with links to where the insights occur in the call transcript.

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.

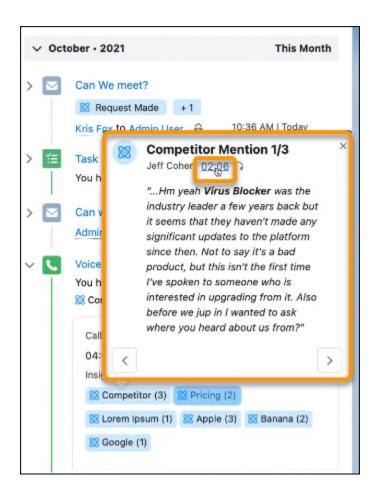
How: Video and voice calls appear on the activity timeline. When call insights are available, they appear with the entry.



To see more details about the call insights and the call itself, expand the entry.

To see more details about a participant, click their name.

To see relevant transcript snippets, hover over a call insight. To go to that spot in the transcript, click the timestamp.



SEE ALSO:

See More Filtering Choices in the Activity Timeline

Einstein Conversation Insights

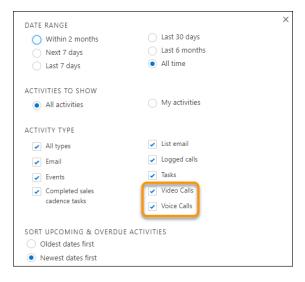
Salesforce Help: Einstein Conversation Insights (Right-click to view in a new tab or window.)

See More Filtering Choices in the Activity Timeline

Your sales team can filter by the voice and video calls available with Einstein Conversation Insights.

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: In the Settings window, choose the Activity Type to filter by.



SEE ALSO:

Learn More About Voice and Video Calls in the Activity Timeline

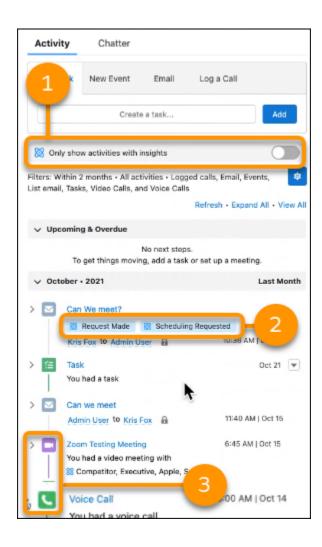
Salesforce Help: Activity Timeline Settings Filters (Right-click to view in a new tab or window.)

Skim More Info in the Streamlined Activity Timeline

An updated insights toggle, a new look for insights, and voice and video events that include Einstein Conversation Insights give your users more info than ever at their fingertips in the activity timeline.

Where: This change applies to Lightning Experience and to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

How: Updates appear throughout the activity timeline.



The option to only show activities with insights has a new look, including a new icon (1). Insights in general have a new icon and appearance (2). And voice and video calls appear on the activity timeline (3).

Sort Past Activities by the Completed Date

You can sort past activities by the date they were completed. Previously, they were sorted by the due date, which gives incomplete info about when something happened. For example, an event is often completed on a different day than when it was due. Now the ambiguity is gone and your reps know when an activity was actually completed.

Where: Available in Lightning Experience in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Sorting past activities by completed date is on by default for new orgs and off by default for existing orgs.

To turn on this sorting option in an existing org, from Setup, in the Quick Find box, enter *Activity Settings*, and then select **Activity Settings**. Select **Sort past activities by completed date**.

Salesforce Inbox

Salesforce Inbox integrates email and calendars with Salesforce so your sales reps can manage their sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

IN THIS SECTION:

Change Settings for List Emails Sent from Lightning Experience

Inbox users who send list emails from Lightning Experience can now adjust their send settings, including the display name and return address.

Track Engagements for Emails with Multiple Recipients Sent from Inbox

To gain more insight into the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient.

Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

Change Settings for List Emails Sent from Lightning Experience

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SEE ALSO:

Adjust List Email Settings for Inbox Users

Track Engagements for Emails with Multiple Recipients Sent from Inbox

To gain more insight into the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

SEE ALSO:

Track Engagements for Multi-Recipient Emails in the Gmail Integration with Inbox

Track Engagements for Multi-Recipient Emails in the Outlook Integration with Inbox

Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- Inbox Mobile for iOS
- Inbox Mobile for Android

To learn about the latest features and enhancements in Inbox desktop, see the Outlook Integration, Gmail Integration, and Email Experience sections of the Salesforce release notes.

SEE ALSO:

Outlook Integration

Gmail Integration

Email Experience

WDC (Legacy Work.com)

WDC is retiring in Spring '22.

IN THIS SECTION:

WDC (Legacy Work.com) Is Being Retired

We're retiring 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 aren't affected and remain available in the application beyond Spring '22.

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We're retiring 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 aren't affected and remain available in the application beyond Spring '22.

Where: This retirement 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 are no longer be visible or otherwise accessible in the application.

SEE ALSO:

Knowledge Article: Phased WDC (legacy Work.com) Feature Retirement

Salesforce Maps

Build marker layers in Salesforce Maps and live layers in Live Tracking with ease. Design territories with the help from overlays using choropleth maps and other boundaries in Territory Planning. And start optimizations for a visit plan and accommodate schedule changes without having to log in to Salesforce Maps Advanced.

IN THIS SECTION:

Salesforce Maps

Experience an easier way to build marker layers and discover the latest shape layers.

Salesforce Maps Territory Planning

Color-code geographical characteristics in alignment borders with choropleth maps, and base new territories on other alignments' boundaries. Improve performance when you permanently delete obsolete datasets and their alignments. And access the latest boundaries when you create datasets.

Salesforce Maps Advanced

Update and regenerate routes to accommodate changes to your reps' schedules without logging in to Salesforce Maps Advanced.

Salesforce Maps Live Tracking

Build live layers easily with a more intuitive builder.

Salesforce Maps

Experience an easier way to build marker layers and discover the latest shape layers.

IN THIS SECTION:

Build Marker Layers Easily

Create marker layers using a new, more intuitive builder in Salesforce Maps. The builder complies with the latest Salesforce accessibility standards and includes an easy-to-use work flow.

Map New and Updated Shape Layers

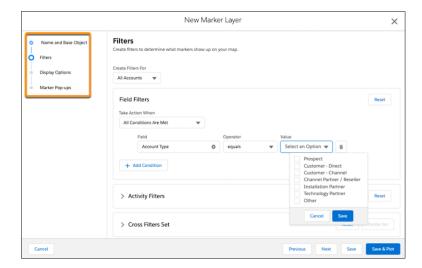
Discover the latest shape layers available in Salesforce Maps. Plot specific areas using new and updated geographic boundaries, and grow your business using the latest public data.

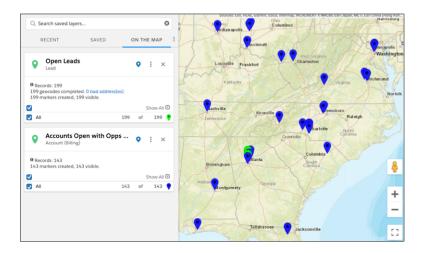
Build Marker Layers Easily

Create marker layers using a new, more intuitive builder in Salesforce Maps. The builder complies with the latest Salesforce accessibility standards and includes an easy-to-use work flow.

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

How: A new, more streamlined marker layer builder helps you select which records appear on the map, what details they show, and how they look. Then sales and service reps see business-critical data and can service and manage records directly from the map.





SEE ALSO:

Salesforce Help: Create Marker Layers (Right-click to view in a new tab or window.)

Map New and Updated Shape Layers

Discover the latest shape layers available in Salesforce Maps. Plot specific areas using new and updated geographic boundaries, and grow your business using the latest public data.

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

Country	Boundary
Australia	State
	Postal Code
Brazil	Regiao
	County
	Postal Code
Canada	County
	Forward Sortation Area
France	Region
	Departement
Germany	Bundesland
India	State/Territory
	District
Indonesia	Provinsi
Malaysia	State

Country	Boundary
	District
New Zealand	Postal Code
Philippines	Region
	Province
	Postal Code
Singapore	Postal Code
Switzerland	Kanton
	Bezirk
Thailand	Changwat
United States	State
	County
	3-Digit Postal Code
	Postal Code
Vietnam	Tinh
United Kingdom	Postal Sector
	Postal District

Salesforce Maps Territory Planning

Color-code geographical characteristics in alignment borders with choropleth maps, and base new territories on other alignments' boundaries. Improve performance when you permanently delete obsolete datasets and their alignments. And access the latest boundaries when you create datasets.

IN THIS SECTION:

Overlay Metrics and Other Borders

Summarize geographical characteristics within alignment borders using color-coded shades on a choropleth map in Salesforce Maps Territory Planning. Design territories influenced by other alignments and geographic borders. Overlays help you plan territories that complement sales and service efforts among multiple divisions in your company.

Clean Up Deleted Datasets and Their Alignments

Improve load time and performance when you permanently remove datasets that you archived and deleted in Salesforce Maps Territory Planning. Ask your Salesforce developer to run the maps.TPSDK.DoCleanup() Apex method, which deletes those datasets and related alignments on a schedule or immediately after you delete archived datasets.

Map New and Updated Boundaries

Discover the latest boundaries available in Salesforce Maps Territory Planning. When you create datasets and plan territories, select specific areas using new and updated geographic territory boundaries such as postal codes.

Other Enhancements in Salesforce Maps Territory Planning

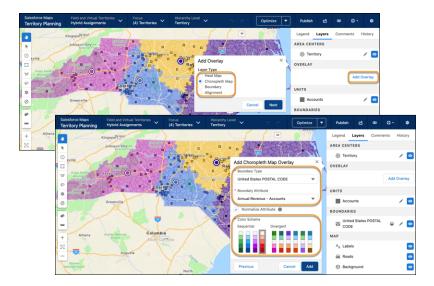
Create datasets from larger reports, share refreshed datasets with the same people, undo and redo territory planning actions, and filter faster.

Overlay Metrics and Other Borders

Summarize geographical characteristics within alignment borders using color-coded shades on a choropleth map in Salesforce Maps Territory Planning. Design territories influenced by other alignments and geographic borders. Overlays help you plan territories that complement sales and service efforts among multiple divisions in your company.

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

How: On the Layers tab, select **Add Overlay**, then select a layer type. Customize the layer to show attributes that matter to you. For example, you create a choropleth map that shows concentrations of high-revenue accounts within postal code boundaries. The color scheme that you specify helps you identify high-revenue accounts on the map easily.



The overlay appears along with its legend on the map. You can change the overlay's opacity, as well as delete, edit, or hide the overlay.



SEE ALSO:

Salesforce Help: Identify Themes with a Choropleth Map (Right-click to view in a new tab or window.)

Salesforce Help: Overlay Geographical Boundaries on the Map (Right-click to view in a new tab or window.)

Salesforce Help: Compare Boundaries in One Alignment with Another (Right-click to view in a new tab or window.)

IdeaExchange: Ability to Create Heat, Density, and Concentration Maps in Territory Planning

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

How: Use the maps.TPSDK.DoCleanup() Apex method to permanently delete datasets that have a Deleted status in the datasets browser. When you permanently delete a dataset, you permanently delete all its alignments too.

SEE ALSO:

Salesforce Maps Apex Developer Guide: Permanently Delete Datasets and Alignments

Map New and Updated Boundaries

Discover the latest boundaries available in Salesforce Maps Territory Planning. When you create datasets and plan territories, select specific areas using new and updated geographic territory boundaries such as postal codes.

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

Country	Boundary
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	Postal Code
Brazil	Regiao
	County
	Postal Code
Canada	County
	Forward Sortation Area
France	Region
	Departement
Germany	Bundesland
India	State/Territory
	District

Country	Boundary
Indonesia	Provinsi
Malaysia	State
	District
New Zealand	Postal Code
Philippines	Region
	Province
	Postal Code
Singapore	Postal Code
Switzerland	Kanton
	Bezirk
Thailand	Changwat
United States	State
	County
	3-Digit Postal Code
	Postal Code
Vietnam	Tinh
United Kingdom	Postal Sector
	Postal District

Other Enhancements in Salesforce Maps Territory Planning

Create datasets from larger reports, share refreshed datasets with the same people, undo and redo territory planning actions, and filter faster.

Where: These changes apply to Lightning Experience and Salesforce Classic for Professional, Enterprise, Performance, Unlimited, and Developer editions.

Import More Records into Reports

If you plan territories for businesses that manage many customers, it's easier than ever to create datasets because now reports can include up to 250,000 records.

Keep Permissions When You Refresh Data Sources

Create copies of datasets and their alignments that include data from freshly run reports and queries, and now include the option to share them with the same people.

Undo and Redo Actions

Plan territories more confidently knowing that you can undo actions that you don't want, or redo actions to help you continue planning. Territory Planning lets you know what you can undo or redo so you know the impact of the changes as you make them.

Added Filter Logic

Show only the data that you want when you use new filter logic in Territory Planning. Instead of using multiple filters to pare down data, save time using nested logic. Filter on several values at once, such as filter logic (1 AND (2 OR 3)) and numeric and text fields. To return results for multiple values, search using commas. For example, "Territory 1, Territory 2" returns results for both territories.

Reuse Calculated Attributes in Other Calculated Attributes

Gain more insight into your territories and break down formulas into smaller components when you reuse calculated attributes in other calculated attributes. For example, you can now include your unit-level calculated attributes in boundary or area-level calculated attributes.

Salesforce Maps Advanced

Update and regenerate routes to accommodate changes to your reps' schedules without logging in to Salesforce Maps Advanced.

IN THIS SECTION:

Create Routes from External Apps and Custom Workflows

Avoid having reps log in to Salesforce Maps Advanced to regenerate (optimize) routes to accommodate schedule, shift, and other changes. Create routes directly from your third-party app or custom workflow by using Apex methods.

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Avoid having reps log in to Salesforce Maps Advanced to regenerate (optimize) routes to accommodate schedule, shift, and other changes. Create routes directly from your third-party app or custom workflow by using Apex methods.

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

How: Optimize routes using these Apex methods:

- maps.API.StartAdvancedOptimizationForVisitPlan()—Create routes for all users assigned to an active visit plan.
- maps.API.StartAdvancedOptimizationForUsers () Create routes for any Salesforce user you specify. Every user must be assigned to at least one active visit plan.

SEE ALSO:

Salesforce Maps Apex Developer Guide: Create Routes for Specific Users (Right-click to view in a new tab or window.)
Salesforce Maps Apex Developer Guide: Create Routes from Visit Plan (Right-click to view in a new tab or window.)

Salesforce Maps Live Tracking

Build live layers easily with a more intuitive builder.

IN THIS SECTION:

Build Live Layers Easily

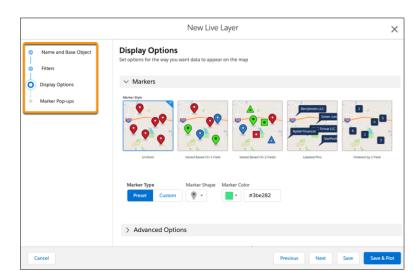
Create live layers using a new, more intuitive builder in Salesforce Maps Live Tracking. The builder complies with the latest Salesforce accessibility standards and includes an easy-to-use work flow.

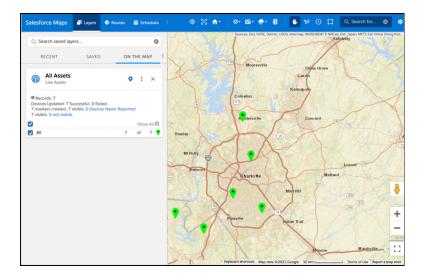
Build Live Layers Easily

Create live layers using a new, more intuitive builder in Salesforce Maps Live Tracking. The builder complies with the latest Salesforce accessibility standards and includes an easy-to-use work flow.

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

How: The streamlined live layer builder helps you select which records appear on the map, what details they show, and how they look. Then sales and service managers see live and historical locations of vehicles, equipment, and users in the field.





SEE ALSO:

Salesforce Help: Create Live Layers (Right-click to view in a new tab or window.)

Salesforce Meetings

Enhance your sales reps' interactions with prospects and customers with tools to prepare for meetings and increase attendee engagement. The Meeting Digest unifies information about who's in a meeting, shows relevant activities, and helps reps ensure that team members know the customer history going into a meeting. The Meeting Studio has a unique camera and presentation view to keep attendees engaged during virtual meetings.

IN THIS SECTION:

Review and Update Record Stages in Salesforce Meetings

Reps now have access to Path components in Salesforce Meetings. In the Meeting Digest, reps can get Guidance for Success for each path stage of a related record. Reps can mark stages complete or revert to a previous stage, and they can add details about next steps during conversations. Previously, the Meeting Digest showed only a compact view of the related records. To change the stage or add next steps, reps drilled into the record details.

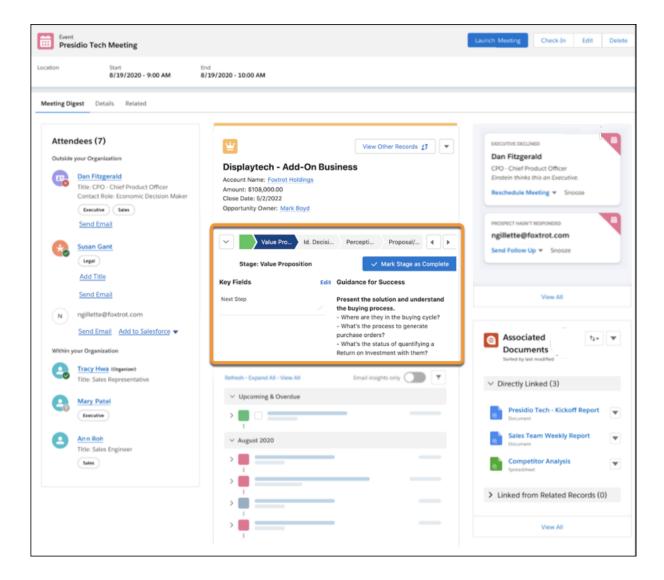
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Where: This change applies to Salesforce Meetings in Lightning Experience in Performance and Unlimited editions.

Who: This change applies to Salesforce Meetings users who have Path enabled and paths created.

How: If an object has an active path, the path appears automatically in the Meeting Digest when an event is related to a record that uses that object. No further setup is required. The path is included in the Meeting Digest on the event page in Lightning Experience, in the Presenter's Panel in Meeting Studio, and when the meeting is pinned to a video conference in the Microsoft Teams Integration.



SEE ALSO:

Salesforce Help: Salesforce Meetings (Right-click to view in a new tab or window.)
Salesforce Help: Guide Users with Path (Right-click to view in a new tab or window.)

Einstein Conversation Insights

Einstein Conversation Insights now includes transcripts for voice and video calls. Users can see conversation data in the activity timeline of related records. And users can receive custom coaching recommendations related to the activity in their customer conversations.

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:

Access Transcripts for Voice and Video Calls

With access to voice and video call transcripts, sales reps and managers can quickly parse customer conversations without relying on the call audio. They can jump seamlessly to the corresponding section of the transcript by clicking different sections of the recording timeline.

See Conversation Data in More Places

Information about voice and video calls is available from the activity timeline of related records. See conversation data, including insights and call transcript snippets, from the activity timeline of related records and within Pipeline Inspection.

See Coaching Recommendations in Your Call Highlights Email

Einstein Conversation Insights for Sales users can see coaching recommendations for calls in the call highlights email. Get custom recommendations based on conversation content. Sales reps hear if they can improve their calls by, say, using fewer filler words or taking more time to listen to customers.

Adjust the Frequency of Call Highlights Emails

Admins can update how often Einstein Conversation Insights users receive call highlights emails. Update email frequency to Daily, Weekly, Monthly, or cease regular emails.

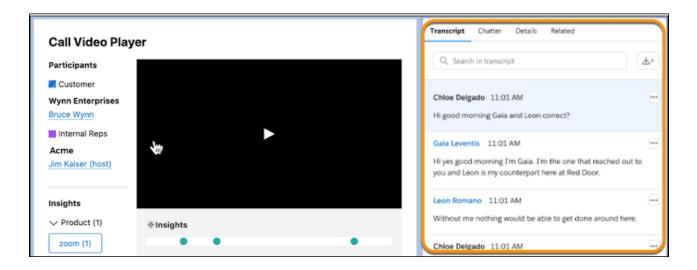
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Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available as an add-on in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to users with access to Einstein Conversation Insights.

How: Access transcripts from the Transcript tab on related voice and video call records.



To jump to the corresponding area of the transcript, click a section of the playback timeline. You can also jump ahead to the section that's most relevant to you. To align the highlighted area of the transcript with the corresponding area of the player, click **Resync with Playback**.

Transcripts are automatically enabled for orgs using Einstein Conversation Insights for Sales. If your organization is using Einstein Conversation Insights for Service, add the Transcript component to the page layout for voice and video call records. Transcripts are available only to calls made after the Spring '22 release.

See Conversation Data in More Places

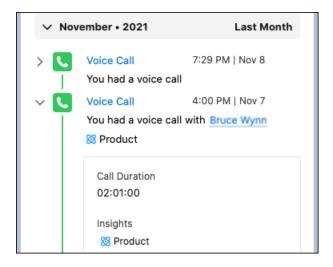
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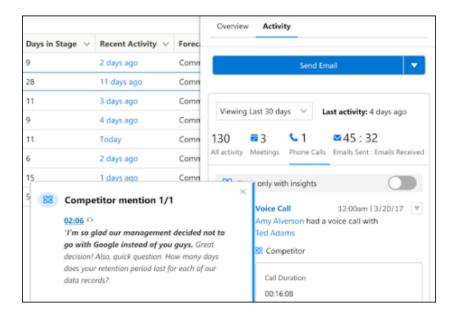
Who: This feature is available to users with access to Einstein Conversation Insights.

How: Users need access to the related call record to see the information in their timeline. Call data appears in records based on the Related Record field in voice and video calls.

To see more details, select the activity dropdown.



To see detailed information, including a link to the related area of the call, click an insight.



Call details are available in the Pipeline Inspection timeline if the calls are related to those opportunities.

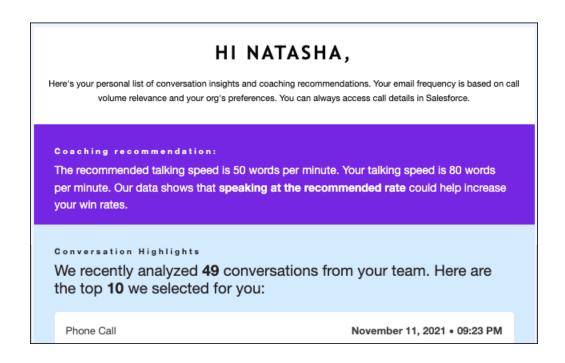
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Einstein Conversation Insights for Sales users can see coaching recommendations for calls in the call highlights email. Get custom recommendations based on conversation content. Sales reps hear if they can improve their calls by, say, using fewer filler words or taking more time to listen to customers.

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.

How: See coaching recommendations bundled automatically with your call highlights emails. Users can see recommendations about different conversation metrics, including talk/listen ratio, speaking speed, number of interruptions, and use of filler words.



Recommendations are based on a user's calls, not the calls of their direct reports or those calls that they otherwise have access to. If there isn't enough data for a given user, coaching recommendations aren't included.

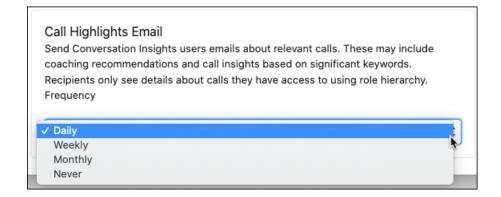
Adjust the Frequency of Call Highlights Emails

Admins can update how often Einstein Conversation Insights users receive call highlights emails. Update email frequency to Daily, Weekly, Monthly, or cease regular emails.

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.

How: Update email frequency from General Settings under Conversation Insights in Setup.



If there aren't enough calls during a given time period, it's possible users won't receive an email.

High Velocity Sales

Start selling faster with included sales cadences. Capture and assign new leads to sales cadences with a chatbot. Track engagement for multi-recipient emails. See call and email engagement for contacts on accounts. Snooze targets in sales cadences. And see prospects' sales cadence history.

High Velocity Sales and its features are available for an extra cost in Enterprise, Performance, and Unlimited Editions. 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:

Start Selling Fast with Included Sales Cadences

Sales managers and reps can start using sales cadences right away without building their own. Included sales cadences cover common sales scenarios and provide examples for sales managers to learn from and expand. Example call scripts and email templates for each sales cadence are also included.

Capture and Add New Prospects to Sales Cadences with a Bot Template

The new Sales Prospecting Bot template comes prebuilt with conversational text and Salesforce flows that capture prospects, connect prospects with sales reps, and add prospects to sales cadences automatically. You can create dialogs for common sales use cases such as answering frequently asked questions and directing website visitors to appropriate resources. Process customer input right away with the bot template's preloaded intent data, and add new intent data for your unique business needs.

Track Engagements for Multi-Recipient Emails

To gain more insight into target engagement with the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient. Previously, an email sent to multiple recipients included engagement information per email sent, not per recipient on the email. Email opens and link clinks are still reported per email sent, and not per recipient.

See Call and Email Engagement for Contacts on Accounts

With the Sales Engagements component on account pages, sales managers can view engagement information for each contact so that they can understand the total engagement of the account.

Pause Sales Cadence Targets for a Specific Length of Time

Now when a prospect is out of the office or asks to be contacted later, sales reps can pause the target in its sales cadence and choose when to resume the target.

Understand the Sales Cadence History of Your Prospects

Now sales reps can quickly see which sales cadences each prospect has been through so that they can make more informed decisions about next steps. When you add the Sales Cadences related list to lead, contact, and person account pages, users can see each sales cadence, the prospect's last completed step, and the results.

High Velocity Sales Will Soon Be Sales Engagement

The High Velocity Sales name is changing to Sales Engagement. The automation features within the product now include customer engagement tracking, chat bots, and sales cadences. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling. Watch for the name change, coming soon.

Other Enhancements to High Velocity Sales

Additional improvements make High Velocity Sales more flexible and extensible.

Start Selling Fast with Included Sales Cadences

Sales managers and reps can start using sales cadences right away without building their own. Included sales cadences cover common sales scenarios and provide examples for sales managers to learn from and expand. Example call scripts and email templates for each sales cadence are also included.

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

Why: Managers can use the included sales cadences as is or as inspiration for more customized sales sequences.

The Sales Cadences from Salesforce folder contains these sales cadences:

- Initiate Contact with New Prospects
- Recover a Lost Opportunity
- Reengage Dormant Prospects
- Follow Up on Interested Prospects
- Set Up a Meeting
- Nurture Existing Customers
- Follow Up with Prospects from Event
- Onboard New Customers
- Nurture Accounts Through Sales Rep Transition
- Nurture Accounts Through Renewal

How: Sales managers activate the sales cadences that they want to use, and then start adding targets.

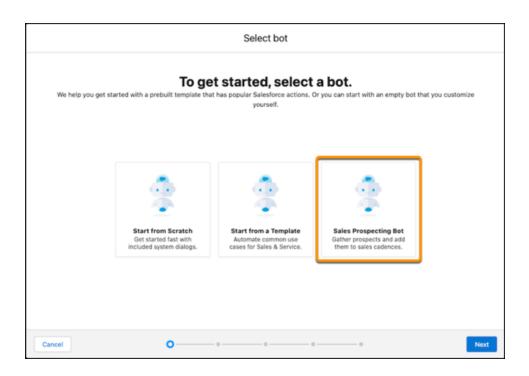
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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

Who: This feature is available to users with a Digital Experience license and the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

How: On the Einstein Bots page in Setup, create your first bot by clicking **Create a New Bot**. If you have existing bots, click **New**. Then choose the Sales Prospecting Bot template.



SEE ALSO:

Salesforce Help: Set Up an Optional Sales Prospecting Bot (Right-click to view in a new tab or window.)

Track Engagements for Multi-Recipient Emails

To gain more insight into target engagement with the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient. Previously, an email sent to multiple recipients included engagement information per email sent, not per recipient on the email. Email opens and link clinks are still reported per email sent, and not per recipient.

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

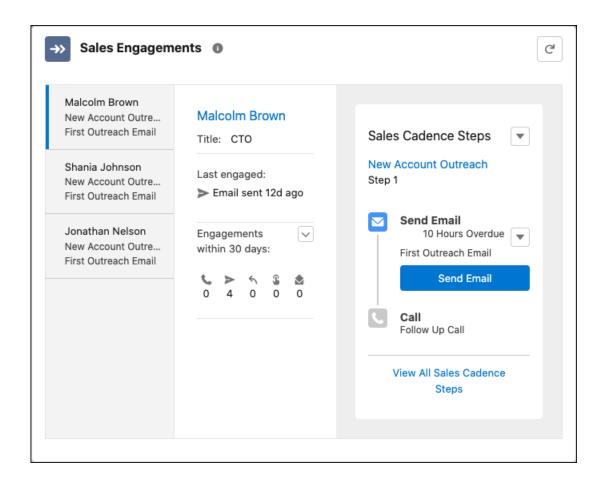
How: Engagement data is collected for recipients in the To and CC fields on an email. This data is available in reports and in the Sales Engagements component on lead, contact, account, person account, and opportunity records.

See Call and Email Engagement for Contacts on Accounts

With the Sales Engagements component on account pages, sales managers can view engagement information for each contact so that they can understand the total engagement of the account.

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

How: In Lightning App Builder, add the Sales Engagements component to account page layouts. The component shows calls made, emails sent, opens, replies, link clicks, and the most recent engagement.

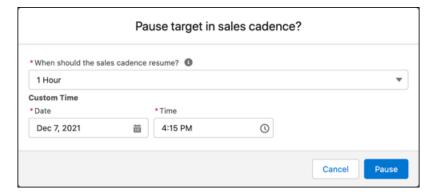


Pause Sales Cadence Targets for a Specific Length of Time

Now when a prospect is out of the office or asks to be contacted later, sales reps can pause the target in its sales cadence and choose when to resume the target.

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

How: From the Work Queue, a target list view, or a target's record page, choose **Pause Target in Sales Cadence**. Then specify when to resume the target.

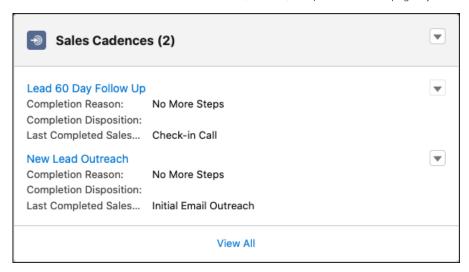


Understand the Sales Cadence History of Your Prospects

Now sales reps can quickly see which sales cadences each prospect has been through so that they can make more informed decisions about next steps. When you add the Sales Cadences related list to lead, contact, and person account pages, users can see each sales cadence, the prospect's last completed step, and the results.

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

How: Add the Sales Cadences related list to lead, contact, and person account page layouts.



High Velocity Sales Will Soon Be Sales Engagement

The High Velocity Sales name is changing to Sales Engagement. The automation features within the product now include customer engagement tracking, chat bots, and sales cadences. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling. Watch for the name change, coming soon.

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

Other Enhancements to High Velocity Sales

Additional improvements make High Velocity Sales more flexible and extensible.

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

Who: These features are available to users with the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

Why: Learn about these additional enhancements to High Velocity Sales.

Automated sales cadence emails can now be threaded

Automated emails are threaded by default. To start a separate thread with an automated email step, deselect **Add to email thread** on the email step card in the Sales Cadence Builder.

Log calls with more detail without a CTI solution

The new Always Show Salesforce Log a Call Window setting in High Velocity Sales Setup lets sales reps easily record call results even when you don't have a CTI solution configured to perform that task.

The active sales cadence target limit can be increased to 1 million

Large organizations have support for twice as many active targets than before. By default, the limit is 500,000. Contact your account rep to increase your limit to 1 million.

Updates to sales cadence task records no longer affect the LastActivityDate field of the parent account

Tasks that are created as part of a sales cadence aren't included in the LastActivityDate calculation.

Triggers are available on sales cadence task records

Because each pending sales cadence step is now linked to a task record, you can use triggers on sales cadence tasks to simulate triggers on sales cadence steps.

Tasks now include a reference to the related sales cadence step

To understand which sales cadence step generated the task, use the new ActionCadenceStepTrackerId field. This field is only available through the API and Workbench.

Log tasks from LinkedIn sales cadence steps without LinkedIn Writeback

The new Log Tasks from LinkedIn Steps setting in High Velocity Sales Setup lets you log LinkedIn tasks even if you haven't enabled LinkedIn's Writeback setting. If you have enabled LinkedIn Writeback, don't use turn on this setting.

Sales Cloud for Slack (Beta)

Help your sales team sell seamlessly, without leaving their conversations in Slack. Teams can access, update, and share records, manage their pipelines, and get important notifications about key accounts and opportunities—all directly from Slack.

SEE ALSO:

Sales Cloud for Slack (Beta) Is Now Available (Right-click to view in a new tab or window.)

Integration with Google

Engagement data includes replies, soft and hard bounces, and out-of-office replies for each recipient of an email sent from the Gmail integration with Inbox.

IN THIS SECTION:

Gmail Integration

Track engagements with the emails that you send to multiple recipients.

Lightning Sync for Google

If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture.

Gmail Integration

Track engagements with the emails that you send to multiple recipients.

IN THIS SECTION:

Track Engagements for Multi-Recipient Emails in the Gmail Integration with Inbox

To gain more insight into the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient. Previously, an email sent to multiple recipients included engagement information by email, not by each recipient on the email. Email opens and link clinks are still reported per email, and not by recipient.

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Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

How: Engagement data is collected for recipients in the To and CC fields on email. Use the Feed tab in Inbox to see engagement activity for single and multiple recipient emails sent from the Gmail integration with Inbox, Lightning Experience, or High Velocity Sales. This data is also available in the engagement related list, and email information in the Activity Timeline.

SEE ALSO:

Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations (Right-click to view in a new tab or window.)

Lightning Sync for Google

If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture.

IN THIS SECTION:

Update Your Google API Settings for Contact Sync Before Spring '22

Starting in Spring '22, Lightning Sync begins using Google People API to sync contacts between Salesforce and Google, and no longer uses legacy Google Contacts API. To avoid a contact sync interruption, work with your Google administrator to update your Google API settings before the Spring '22 release.

Check Out Einstein Activity Capture Improvements for Google Customers

Einstein Activity Capture is now the go-to product to sync contacts or events with your Google account. To see if you're ready to make the move, check out what's new for Einstein Activity Capture in Spring '22. Admins can decide whether sensitive emails are shared with other users. And managers can get a better understanding of their teams' email activity using two new Activity Metrics fields: Last Email Sent Date and Last Email Received Date.

Update Your Google API Settings for Contact Sync Before Spring '22

Starting in Spring '22, Lightning Sync begins using Google People API to sync contacts between Salesforce and Google, and no longer uses legacy Google Contacts API. To avoid a contact sync interruption, work with your Google administrator to update your Google API settings before the Spring '22 release.

Where: This change applies to customers who work from Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: This change affects all Lightning Sync for Google users who are set up to sync contacts.

How: For information on how to update your Google API settings, see Update Your Einstein Activity Capture or Lightning Sync for Google Settings Before Spring '22.

Check Out Einstein Activity Capture Improvements for Google Customers

Einstein Activity Capture is now the go-to product to sync contacts or events with your Google account. To see if you're ready to make the move, check out what's new for Einstein Activity Capture in Spring '22. Admins can decide whether sensitive emails are shared with other users. And managers can get a better understanding of their teams' email activity using two new Activity Metrics fields: Last Email Sent Date and Last Email Received Date.

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

Salesforce Help: Compare Einstein Activity Capture and Lightning Sync (Right-click to view in a new tab or window.)

Integration with Microsoft

Reps who meet with customers using video conference in Microsoft Teams can pin and access Salesforce records and Salesforce Meetings during the video conference. Engagement data includes replies, soft and hard bounces, and out-of-office replies for each recipient of an email sent from the Outlook integration with Inbox. Lightning Sync customers who started their migration to Einstein Activity Capture can now turn off Lightning Sync for good. And Salesforce for Outlook is still scheduled for retirement in June 2023.

IN THIS SECTION:

Teams Integration

Reps who use Microsoft Teams video conferences to meet with their customers can now access Salesforce records and Salesforce Meetings details in their Teams meetings.

Outlook Integration

Log in using a faster, more secure, and more reliable authentication method. Track engagements with the emails that you send to multiple recipients. Support for older versions of Outlook ends December 31, 2022.

Lightning Sync for Microsoft® Exchange

If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture. Or, if you already started your move and are ready to stop using Lightning Sync, you can now turn it off.

Salesforce for Outlook

Salesforce for Outlook is scheduled to retire in June 2023. Read about moving to our next-generation products: the Outlook Integration and Einstein Activity Capture. Or, if you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

Teams Integration

Reps who use Microsoft Teams video conferences to meet with their customers can now access Salesforce records and Salesforce Meetings details in their Teams meetings.

IN THIS SECTION:

Get the Salesforce Information You Need During Microsoft Teams Meetings

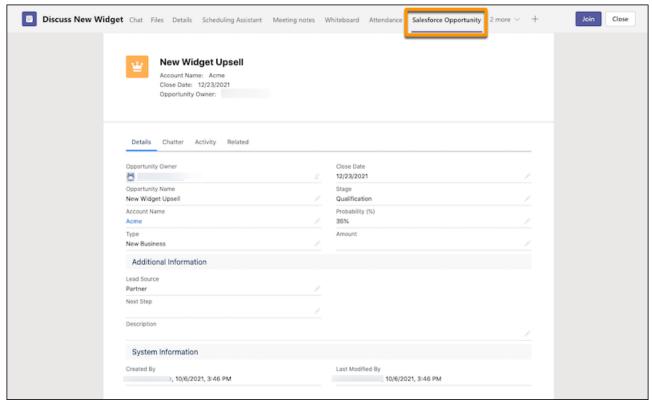
Reps who meet with customers using video conference in Microsoft Teams can pin Salesforce records and Salesforce Meetings and access the pinned information in a side panel during the meeting. Combining Salesforce with Teams meetings gives your team direct access to the information they need where they need it, enabling more productive customer interactions.

Get the Salesforce Information You Need During Microsoft Teams Meetings

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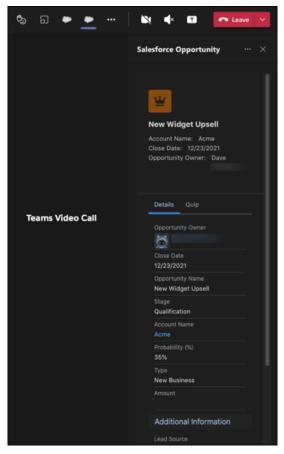
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales Cloud and Service Cloud.

How: Pinning a Salesforce record or Salesforce Meeting to a Teams meeting creates a custom tab on the Teams meeting that shows the record content and Meeting Digest, respectively.

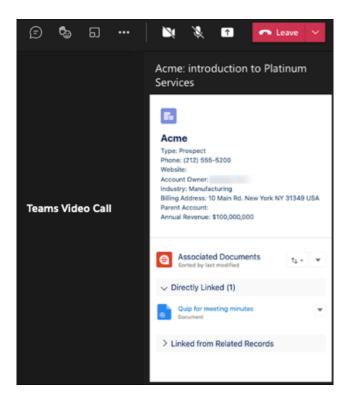


The Teams video call includes a side panel that shows Salesforce record details when the record is pinned as a tab on the Teams meeting. Quip customers also see the Quip documents and spreadsheets associated with that record for quick reference and taking notes. Clicking an associated document opens it in a new tab where reps can review and add content.

This feature is available for Teams on Desktop, but not the web version. It's also available for Teams on Mobile.



The Teams video call side panel shows the Meeting Digest when a Salesforce Meeting is pinned as a tab on the Teams meeting. This feature is available for Teams on Desktop.



SEE ALSO:

Salesforce Help: Integration with Microsoft Teams (Right-click to view in a new tab or window.)

Outlook Integration

Log in using a faster, more secure, and more reliable authentication method. Track engagements with the emails that you send to multiple recipients. Support for older versions of Outlook ends December 31, 2022.

IN THIS SECTION:

Track Engagements for Multi-Recipient Emails in the Outlook Integration with Inbox

To gain more insight into the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient. Previously, an email sent to multiple recipients included engagement information by email, not by each recipient on the email. Email opens and link clinks are still reported per email, and not by recipient.

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.

Support Is Available for the Outlook Integration in the New Outlook for Mac

Now your sales reps can use the Outlook integration with the new Outlook for Mac experience starting February 28, 2022. Or reps can continue to use the legacy Outlook for Mac. For an overview of the new experience, see the Microsoft documentation about the new Outlook for Mac.

Track Engagements for Multi-Recipient Emails in the Outlook Integration with Inbox

To gain more insight into the emails that your reps send, engagement data now includes replies, soft and hard bounces, and out-of-office replies for each email recipient. Previously, an email sent to multiple recipients included engagement information by email, not by each recipient on the email. Email opens and link clinks are still reported per email, and not by recipient.

Where: This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

How: Engagement data is collected for recipients in the To and CC fields on email. Use the Feed tab in Inbox to see engagement activity for single and multiple recipient emails sent from the Outlook integration with Inbox, Lightning Experience, or High Velocity Sales. This data is also available in the engagement related list, and email information in the Activity Timeline.

SEE ALSO:

Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations (Right-click to view in a new tab or window.)

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.

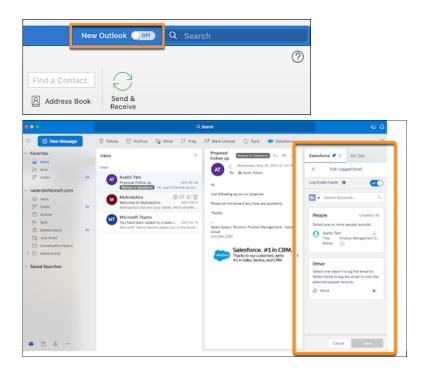
SEE ALSO:

Salesforce Help: Outlook Integration System Requirements (Right-click to view in a new tab or window.)

Support Is Available for the Outlook Integration in the New Outlook for Mac

Now your sales reps can use the Outlook integration with the new Outlook for Mac experience starting February 28, 2022. Or reps can continue to use the legacy Outlook for Mac. For an overview of the new experience, see the Microsoft documentation about the new Outlook for Mac.

Where: This change applies to the Outlook integration, formerly known as Lightning for Outlook, in all editions.



SEE ALSO:

Salesforce Help: Outlook Integration System Requirements (Right-click to view in a new tab or window.)

External Link: The new Outlook for Mac

Lightning Sync for Microsoft® Exchange

If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture. Or, if you already started your move and are ready to stop using Lightning Sync, you can now turn it off.

IN THIS SECTION:

Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers

Einstein Activity Capture is now the go-to product to sync contacts or events with Outlook. To see if you're ready to make the move, check out what's new for Einstein Activity Capture in Spring '22. Admins can decide whether sensitive emails are shared with other users. And managers can get a better understanding of their teams' email activity using two new Activity Metrics fields: Last Email Sent Date and Last Email Received Date. Or, if your move to Einstein Activity Capture is under way, you can download a CSV file that shows which users are still using Lightning Sync. Then you know who still requires an Einstein Activity Capture permission.

Finish Your Move to Einstein Activity Capture

After you move your Lightning Sync settings to Einstein Activity Capture and give users the proper permissions, you're ready to turn off Lightning Sync.

Check Out Einstein Activity Capture Improvements for Microsoft Exchange Customers

Einstein Activity Capture is now the go-to product to sync contacts or events with Outlook. To see if you're ready to make the move, check out what's new for Einstein Activity Capture in Spring '22. Admins can decide whether sensitive emails are shared with other users. And managers can get a better understanding of their teams' email activity using two new Activity Metrics fields: Last Email Sent Date and Last Email Received Date. Or, if your move to Einstein Activity Capture is under way, you can download a CSV file that shows which users are still using Lightning Sync. Then you know who still requires an Einstein Activity Capture permission.

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

Salesforce Help: Move from Lightning Sync to Einstein Activity Capture (Right-click to view in a new tab or window.)

Finish Your Move to Einstein Activity Capture

After you move your Lightning Sync settings to Einstein Activity Capture and give users the proper permissions, you're ready to turn off Lightning Sync.

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

SEE ALSO:

Finish Your Move from Lightning Sync

Salesforce for Outlook

Salesforce for Outlook is scheduled to retire in June 2023. Read about moving to our next-generation products: the Outlook Integration and Einstein Activity Capture. Or, if you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

IN THIS SECTION:

Salesforce for Outlook Is Retiring 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 in Spring '22.

Find Version-Specific Salesforce for Outlook Release Notes

Wondering about the updates available in each Salesforce for Outlook version? Find version-specific release notes in the Outlook/Teams, Gmail, and Inbox Trailblazer Community.

Salesforce for Outlook Is Retiring 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 in Spring '22.

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

Why: When Salesforce for Outlook retires, the product will no longer sync contacts, events, or tasks. Likewise, 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 Spring '22 Einstein Activity Capture and Outlook Integration improvements, see these release notes.

- Outlook Integration on page 557
- Einstein Activity Capture on page 519

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 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 (Right-click to view in a new tab or window.)

Salesforce CDP

Get deeper integrations with Salesforce partners and products to expand the power of Salesforce CDP, our self-service customer data platform. AppExchange partners and developers can now build and share external activation platforms, letting you expand your activation capabilities with familiar solutions. There's a new SDK to unify Salesforce CDP and Marketing Cloud MobilePush data for messages and insights. And look out for updated documentation to help you on your Salesforce CDP journey.

IN THIS SECTION:

Package and Deploy Ingestion API Data Streams for Easy Reuse

The Ingestion API helps you bring source data into Customer Data Platform from wherever you store it, whether in a data warehouse or other external system. Now you can package and deploy Ingestion API data streams for use in other Customer Data Platform orgs. Packaging ensures your configurations stay the same as you move between orgs and reduces manual steps. For example, package an Ingestion API data stream in one org for testing and then package and deploy it in another org for use in production.

Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform

Marketing Cloud and Customer Data Platform customers can now maintain data boundaries across different business units (BUs), such as brands or geographies. After enabling the feature in Marketing Cloud and Customer Data Platform, customers can keep contacts separate when creating segments to use in marketing efforts. Previously, because BU data wasn't separated at ingestion into Customer Data Platform, contacts affiliated with different BUs couldn't easily be kept separate for more refined segments. For example, a company with North America and Europe BUs can now create a segment with a Europe BU filter to target only European customers in an email campaign.

View All Identity Resolution Summary Statistics Together

With the new Resolution Summary in Identity Resolution, review all your summary statistics for each ruleset in one place alongside a detailed explanation of each value. The new Known Unified Profiles and Anonymous Unified Profiles values help you track your progress toward your profile entitlement limit across Customer Data Platform.

Test Multiple Identity Resolution Rulesets Faster

Your first identity resolution ruleset can now have an optional ruleset ID so you can create multiple rulesets with different ruleset IDs faster. Previously, since your first ruleset couldn't have a ruleset ID, you had to wait for Customer Data Platform to finish deleting the ruleset before creating a new one. Now you can create up to two rulesets with different ruleset IDs without any waiting, giving you even more flexibility in how you name unified objects.

Track Known and Anonymous Individual Profiles

Previously all unified profiles were considered known profiles, even profiles with anonymous data. Salesforce CDP now provides a way for you to differentiate between known and anonymous profiles. To categorize a profile as anonymous, add a mapping to the Is Anonymous field on the Individual object in Data Streams. To keep track of your known profiles, the Salesforce entitlement Salesforce CDP Maximum Number of Profiles was renamed to Salesforce CDP Maximum Number of Known Profiles. Salesforce CDP allows 5 anonymous profiles for each known profile to support anonymous data collection.

Share a Mobile SDK Across Salesforce CDP and Marketing Cloud MobilePush

A new Mobile software development kit (SDK) is available for native Android and iOS across Salesforce CDP and MobilePush. The Engagement Mobile SDK enhances the developer experience by requiring events to be tracked one time across Salesforce CDP and MobilePush. Its modular architecture offers improved performance. And the transformation logic is abstracted into individual modules to deliver a cohesive experience. The SDK also supports the Unified Event Data model introduced as part of the Interactions Web SDK. This allows you to have a uniform data model across web and mobile applications.

View Dynamic Profile Explorer Data Using Lightning Builder

The Unified Individual data model objects (DMOs) record page in Profile Explorer is now a Lightning page and can be changed by Lightning Builder. Profile Explorer allows you to view a single customer profile's unified identity and the corresponding individual attribute and contact points, insights, and engagement data. Use Lightning Builder to add or remove components and fields, and then publish your changes. This new functionality gives you a flexible way to add or remove attributes to be displayed in Profile Explorer and display views with different attributes to different CDP users.

Build Streaming Insights with Insight Builder

You can now create insights in Insight Builder for either Calculated or Streaming Insights. Use this functionality to increase your insight capability and to create formulas.

Create Complex Metrics on Metrics with Insight Builder

Insights Builder now includes advanced functionality such as transformation functions and new analytical functions. You can now build complex metrics by using metrics on metrics, like a metric for email click rate. This metric could be composed of 2 metrics: sum of email clicks the numerator and sum of email sends in the denominator. You can now put the two together into the single metric with the drag-and-drop Insight Builder without writing SQL.

Build More Sophisticated Insights with New Functions

Create richer insights in Insight Builder with the transform node's useful functions. And aggregate node is enhanced to include several advanced analytical functions including rank, percentile, lead, ntile, and lag. Filter node now has functions such as relative date filters and regular expression matching. You can also filter metrics after they're computed by using the new Aggregate Filter.

Create Data Actions on Streaming Engagement Data to Drive Automations

You can now create data actions on streaming engagement data such as streaming data coming from Web or Mobile SDK. Data actions allow you to send events and insights triggers to Webhooks and Salesforce platform events.

Package an External Activation Platform

Now your users can access connectors, connect accounts, and activate data. Create an External Activation Platform to share on the AppExchange or provide the package URL generated in Package Manager for your users to install and use in Salesforce CDP.

Create Better Segments with Different Individual Entity Rulesets

Segment on all entities created by different identity resolution rulesets in new segments and the attribute library. Previously, only entities and attributes from the first identity resolution ruleset were available in segmentation. For example, create a segment for an entity from a ruleset with stricter match rules for a smaller segment population and activate it to Marketing Cloud for a targeted advertising campaign.

Save Time with More Reliable Segment Publishing

Previously, if Salesforce CDP hit the maximum number of segments publishing simultaneously, manually published segments were skipped altogether and scheduled segments were published the next day. Now, instead of skipping publishing any manual or scheduled segments, Salesforce CDP starts publishing all segments 30 minutes later on the same day.

Create Segments with B2C Commerce Attributes

Check out the latest addition to our segmentation filters documentation for examples of how to use attributes from B2C Commerce in your segments. Customize segments with your B2C Commerce data.

Gain Insight from Segment and Activation Counts in Publish History

Compare your segment and activation counts over time with a new column in Publish History. The new Segment column replaces the existing Count column, and the new Activation column counts how many profiles are sent to your activation target. Accepted and Rejected columns now show how many of the profiles sent to a Marketing Cloud activation target were received. Use the new counts to evaluate segment and activation count mismatches and why profiles were rejected by Marketing Cloud.

Reach More Customers with External Activation Platforms

Deliver on your digital marketing strategies faster with External Activation Platforms. Install and connect an External Activation Platform from the AppExchange or a packaged URL to Salesforce CDP. Create an activation target and activate your segments to reach prospects and customers on popular demand-side platforms and advertising channels.

Unlock Tableau CRM Insights on Salesforce CDP Data

When you unify data in Salesforce CDP, you want reliable metrics on it. With Tableau CRM Direct Data for Salesforce CDP, view actionable insights on Salesforce CDP data in embedded dashboards for any Salesforce Object. Business users can further augment the analysis that Tableau CRM already provides them on their data. You can also configure your Salesforce CDP users to access Tableau CRM inside CDP as if it's another tab, giving you an in-app dashboard building and analysis experience.

Use Universal ID Lookup API to Query Across Salesforce CDP

Universal ID Lookup API empowers developers to query on an Individual ID from one source and return all the Individual IDs for the same individual from all other data sources. For each individual record, a unified individual is created based on identity resolution rules and all individual records matched based on these rule are assigned the same Unified Individual ID. It is based on this ID that this new API retrieves all the related IDs.

Use Query V2 API to Connect to Java classPath Tools

Use Query V2 API to connect Salesforce CDP with any Java classPath tools to access and receive data. Introduced in version 1.91, Query V2 API is the default API called in the Java Database Connectivity (JDBC). This API returns the results as an array of records. The expected input when calling this API is free form SQL. The expected input objects include data stream, profile and engagement data model objects, and unified data model objects. This API can be used to support a variety of use cases, including large volume data reads, external application integration, or interactive ad hoc querying on the data lake.

Salesforce CDP API: New and Changed Items

Here's where you can find new and changed REST API calls, metadata objects, and more for Salesforce CDP API.

Navigate the Salesforce CDP Journey

Get familiar with Salesforce CDP by using the improved navigation structure and updated home page. Check out help topics, guides, developer documentation, and Trailhead modules, all in one place.

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.

Package and Deploy Ingestion API Data Streams for Easy Reuse

The Ingestion API helps you bring source data into Customer Data Platform from wherever you store it, whether in a data warehouse or other external system. Now you can package and deploy Ingestion API data streams for use in other Customer Data Platform orgs. Packaging ensures your configurations stay the same as you move between orgs and reduces manual steps. For example, package an Ingestion API data stream in one org for testing and then package and deploy it in another org for use in production.

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

When: This feature is available starting the week of April 18, 2022.

SEE ALSO:

Salesforce Help: Ingestion API (Right-click to view in a new tab or window.)

Salesforce Help: Using the Metadata API in Customer Data Platform (Right-click to view in a new tab or window.)

Salesforce Help: Packaging in Customer Data Platform (Right-click to view in a new tab or window.)

Salesforce Help: Create and Install Your Package (Right-click to view in a new tab or window.)

Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform

Marketing Cloud and Customer Data Platform customers can now maintain data boundaries across different business units (BUs), such as brands or geographies. After enabling the feature in Marketing Cloud and Customer Data Platform, customers can keep contacts separate when creating segments to use in marketing efforts. Previously, because BU data wasn't separated at ingestion into Customer Data Platform, contacts affiliated with different BUs couldn't easily be kept separate for more refined segments. For example, a company with North America and Europe BUs can now create a segment with a Europe BU filter to target only European customers in an email campaign.

Where: This change applies to Lightning Experience in all editions and requires Marketing Cloud for an additional cost.

When: This feature is available in Customer Data Platform and Marketing Cloud starting the week of March 28, 2022.

How: Contact Salesforce Customer Support to enable Contacts to Business Unit Mapping in Marketing Cloud. In Customer Data Platform Setup, enable Allow Profile Business Unit Mapping Data. Filter segments by BU in Customer Data Platform and activate them to a Marketing Cloud Data Extension.



Warning: Enabling Allow Profile Business Unit Mapping Data in Customer Data Platform is permanent and can't be undone.

SEE ALSO:

Business Unit Aware Integration: Marketing Cloud and Customer Data Platform (Right-click to view in a new tab or window.)

Salesforce Help: Enable Contact to Business Unit Mapping (Right-click to view in a new tab or window.)

Salesforce Help: Set Up Marketing Cloud Connection in Salesforce CDP (Right-click to view in a new tab or window.)

Salesforce Help: Multiple Marketing Cloud Business Units in Segments (Right-click to view in a new tab or window.)

Salesforce Help: Configure the Data Extension Entry Source with Customer Data Platform (Right-click to view in a new tab or window.)

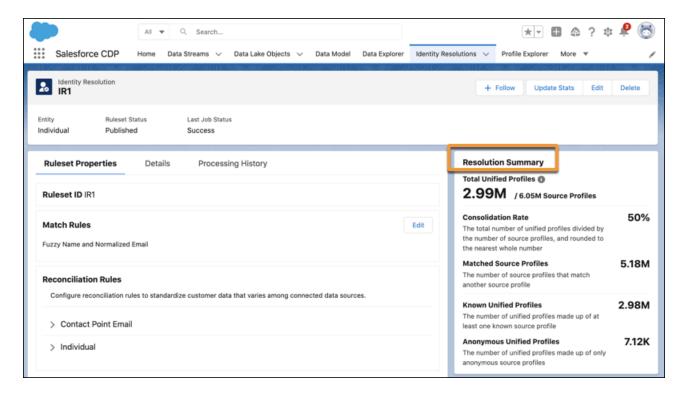
View All Identity Resolution Summary Statistics Together

With the new Resolution Summary in Identity Resolution, review all your summary statistics for each ruleset in one place alongside a detailed explanation of each value. The new Known Unified Profiles and Anonymous Unified Profiles values help you track your progress toward your profile entitlement limit across Customer Data Platform.

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

When: The Resolution Summary is visible starting the week of March 14, 2022.

Why: Some values were available previously, but the Resolution Summary consolidates all the values into one place for easy reference.



SEE ALSO:

Salesforce Help: Identity Resolution Summary (Right-click to view in a new tab or window.)

Salesforce Help: Anonymous and Known Profiles in Identity Resolution (Right-click to view in a new tab or window.)

Salesforce Help: Salesforce CDP Edition Allocations (Right-click to view in a new tab or window.)

Test Multiple Identity Resolution Rulesets Faster

Your first identity resolution ruleset can now have an optional ruleset ID so you can create multiple rulesets with different ruleset IDs faster. Previously, since your first ruleset couldn't have a ruleset ID, you had to wait for Customer Data Platform to finish deleting the ruleset before creating a new one. Now you can create up to two rulesets with different ruleset IDs without any waiting, giving you even more flexibility in how you name unified objects.

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

When: Ruleset IDs are optional for all Identity Resolution Rulesets starting the week of February 7, 2022.

SEE ALSO:

Salesforce Help: Individual Entity Ruleset (Right-click to view in a new tab or window.)

Salesforce Help: Unified Link Objects and Relationships to Unified Objects (Right-click to view in a new tab or window.)

Track Known and Anonymous Individual Profiles

Previously all unified profiles were considered known profiles, even profiles with anonymous data. Salesforce CDP now provides a way for you to differentiate between known and anonymous profiles. To categorize a profile as anonymous, add a mapping to the Is Anonymous field on the Individual object in Data Streams. To keep track of your known profiles, the Salesforce entitlement Salesforce CDP Maximum Number of Profiles was renamed to Salesforce CDP Maximum Number of Known Profiles. Salesforce CDP allows 5 anonymous profiles for each known profile to support anonymous data collection.

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

Why: Collecting data about anonymous individuals is critical to getting the most out of Salesforce CDP. When previously anonymous individuals provide their identity, identity resolution can unify existing anonymous data with known profiles for richer unified profiles. More data in unified profiles helps marketers create more personalized experiences using Salesforce CDP segments and activations.

How: From Setup, in the Quick Find box, enter *Company Information*, and then select **Company Information** to see your allowance and amount used for the new entitlement. You can also view the number of known and anonymous profiles created for each ruleset in Identity Resolution.

SEE ALSO:

Salesforce Help: Salesforce CDP Edition Allocations (Right-click to view in a new tab or window.)

Salesforce Help: Anonymous and Known Profiles in Identity Resolution (Right-click to view in a new tab or window.)

Share a Mobile SDK Across Salesforce CDP and Marketing Cloud MobilePush

A new Mobile software development kit (SDK) is available for native Android and iOS across Salesforce CDP and MobilePush. The Engagement Mobile SDK enhances the developer experience by requiring events to be tracked one time across Salesforce CDP and MobilePush. Its modular architecture offers improved performance. And the transformation logic is abstracted into individual modules to deliver a cohesive experience. The SDK also supports the Unified Event Data model introduced as part of the Interactions Web SDK. This allows you to have a uniform data model across web and mobile applications.

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

How: In Salesforce CDP Admin, register your Mobile App, upload the event schema, and copy the App Source ID. Create data streams for your app in Salesforce CDP. After you get the latest build of Mobile SDK for iOS or Android, developers can configure and instrument the Mobile App to send events to Salesforce CDP.

SEE ALSO:

Salesforce Developer: Engagement Mobile SDK (Right-click to view in a new tab or window.)

View Dynamic Profile Explorer Data Using Lightning Builder

The Unified Individual data model objects (DMOs) record page in Profile Explorer is now a Lightning page and can be changed by Lightning Builder. Profile Explorer allows you to view a single customer profile's unified identity and the corresponding individual attribute and contact points, insights, and engagement data. Use Lightning Builder to add or remove components and fields, and then publish your changes. This new functionality gives you a flexible way to add or remove attributes to be displayed in Profile Explorer and display views with different attributes to different CDP users.

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

How: Click the gear option in Salesforce CDP, and then click **Edit Page**.

SEE ALSO:

Salesforce Help: Profile Explorer (Right-click to view in a new tab or window.)

Build Streaming Insights with Insight Builder

You can now create insights in Insight Builder for either Calculated or Streaming Insights. Use this functionality to increase your insight capability and to create formulas.

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

How: Navigate to the Calculated Insights tab in Salesforce CDP and click **Create with Builder**. Then select either a Calculated or a Streaming Insight.

SEE ALSO:

Salesforce Help: Visual Insight Builder(Right-click to view in a new tab or window.)

Create Complex Metrics on Metrics with Insight Builder

Insights Builder now includes advanced functionality such as transformation functions and new analytical functions. You can now build complex metrics by using metrics on metrics, like a metric for email click rate. This metric could be composed of 2 metrics: sum of email clicks the numerator and sum of email sends in the denominator. You can now put the two together into the single metric with the drag-and-drop Insight Builder without writing SQL.

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

How: Navigate to the Calculated Insights tab in Salesforce CDP and create an insight with the visual builder.

SEE ALSO:

Salesforce Help: Visual Insight Builder(Right-click to view in a new tab or window.)

Build More Sophisticated Insights with New Functions

Create richer insights in Insight Builder with the transform node's useful functions. And aggregate node is enhanced to include several advanced analytical functions including rank, percentile, lead, ntile, and lag. Filter node now has functions such as relative date filters and regular expression matching. You can also filter metrics after they're computed by using the new Aggregate Filter.

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

How: Navigate to the Calculated Insights tab in Salesforce CDP and create an insight with the visual builder.

SEE ALSO:

Salesforce Help: Visual Insight Builder(Right-click to view in a new tab or window.)

Create Data Actions on Streaming Engagement Data to Drive Automations

You can now create data actions on streaming engagement data such as streaming data coming from Web or Mobile SDK. Data actions allow you to send events and insights triggers to Webhooks and Salesforce platform events.

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

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:

Salesforce Help: Streaming Insights and Data Actions Flow(Right-click to view in a new tab or window.)

Package an External Activation Platform

Now your users can access connectors, connect accounts, and activate data. Create an External Activation Platform to share on the AppExchange or provide the package URL generated in Package Manager for your users to install and use in Salesforce CDP.

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

SEE ALSO:

Salesforce Help: Create an External Activation Platform (Right-click to view in a new tab or window.)

Create Better Segments with Different Individual Entity Rulesets

Segment on all entities created by different identity resolution rulesets in new segments and the attribute library. Previously, only entities and attributes from the first identity resolution ruleset were available in segmentation. For example, create a segment for an entity from a ruleset with stricter match rules for a smaller segment population and activate it to Marketing Cloud for a targeted advertising campaign.

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

How: After creating two rulesets in identity resolution, use entities and attributes for both rulesets in segmentation. Entities and attribute names from the second ruleset include the ruleset ID at the end of the names when you select what entity to **Segment On** or add attributes in the attribute library.

SEE ALSO:

Salesforce Help: Multiple Identity Resolution Rulesets in Segments (Right-click to view in a new tab or window.)

Salesforce Help: Identity Resolution (Right-click to view in a new tab or window.)

Salesforce Help: Segment Canvas Interface (Right-click to view in a new tab or window.)

Salesforce Help: Create Activation for a Segment (Right-click to view in a new tab or window.)

Save Time with More Reliable Segment Publishing

Previously, if Salesforce CDP hit the maximum number of segments publishing simultaneously, manually published segments were skipped altogether and scheduled segments were published the next day. Now, instead of skipping publishing any manual or scheduled segments, Salesforce CDP starts publishing all segments 30 minutes later on the same day.

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

SEE ALSO:

Salesforce Help: Publish a Segment in Salesforce CDP (Right-click to view in a new tab or window.)

Salesforce Help: Segment Types and Statuses (Right-click to view in a new tab or window.)

Create Segments with B2C Commerce Attributes

Check out the latest addition to our segmentation filters documentation for examples of how to use attributes from B2C Commerce in your segments. Customize segments with your B2C Commerce data.

SEE ALSO:

Salesforce Help: B2C Commerce Filters (Right-click to view in a new tab or window.)

Trailhead: Salesforce CDP for Commerce: Quick Look

Salesforce Help: B2C Commerce Connector (Right-click to view in a new tab or window.)

Gain Insight from Segment and Activation Counts in Publish History

Compare your segment and activation counts over time with a new column in Publish History. The new Segment column replaces the existing Count column, and the new Activation column counts how many profiles are sent to your activation target. Accepted and Rejected columns now show how many of the profiles sent to a Marketing Cloud activation target were received. Use the new counts to evaluate segment and activation count mismatches and why profiles were rejected by Marketing Cloud.

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

SEE ALSO:

Salesforce Help: Activation Publish History (Right-click to view in a new tab or window.)

Salesforce Help: Publish a Segment in Salesforce CDP (Right-click to view in a new tab or window.)

Salesforce Help: Data Extensions for Salesforce CDP (Right-click to view in a new tab or window.)

Salesforce Help: Segment Types and Statuses (Right-click to view in a new tab or window.)

Reach More Customers with External Activation Platforms

Deliver on your digital marketing strategies faster with External Activation Platforms. Install and connect an External Activation Platform from the AppExchange or a packaged URL to Salesforce CDP. Create an activation target and activate your segments to reach prospects and customers on popular demand-side platforms and advertising channels.

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

SEE ALSO:

Salesforce Help: Connect an External Activation Platform (Right-click to view in a new tab or window.)

Unlock Tableau CRM Insights on Salesforce CDP Data

When you unify data in Salesforce CDP, you want reliable metrics on it. With Tableau CRM Direct Data for Salesforce CDP, view actionable insights on Salesforce CDP data in embedded dashboards for any Salesforce Object. Business users can further augment the analysis that Tableau CRM already provides them on their data. You can also configure your Salesforce CDP users to access Tableau CRM inside CDP as if it's another tab, giving you an in-app dashboard building and analysis experience.

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

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

How: In the Tableau CRM dashboard builder, select **Salesforce CDP** as the data source for a new query. Select a data lake object, data model, or calculated insight.

SEE ALSO:

Salesforce Release Note: Unlock Insights on Salesforce CDP Data(Right-click to view in a new tab or window.)

Use Universal ID Lookup API to Query Across Salesforce CDP

Universal ID Lookup API empowers developers to query on an Individual ID from one source and return all the Individual IDs for the same individual from all other data sources. For each individual record, a unified individual is created based on identity resolution rules and all individual records matched based on these rule are assigned the same Unified Individual ID. It is based on this ID that this new API retrieves all the related IDs.

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

Connect REST API and Connect in Apex support Universal ID Lookup.

SEE ALSO:

Salesforce Developer: Salesforce CDP Universal Id Lookup API (Right-click to view in a new tab or window.)

Use Query V2 API to Connect to Java classPath Tools

Use Query V2 API to connect Salesforce CDP with any Java classPath tools to access and receive data. Introduced in version 1.91, Query V2 API is the default API called in the Java Database Connectivity (JDBC). This API returns the results as an array of records. The expected input when calling this API is free form SQL. The expected input objects include data stream, profile and engagement data model objects, and unified data model objects. This API can be used to support a variety of use cases, including large volume data reads, external application integration, or interactive ad hoc querying on the data lake.

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

Connect REST API and Connect in Apex support Query V2.

SEE ALSO:

Salesforce Developer: Salesforce CDP Query V2 API Library (Right-click to view in a new tab or window.)

Salesforce CDP API: New and Changed Items

Here's where you can find new and changed REST API calls, metadata objects, and more for Salesforce CDP API.

REST API new fields.

Roll up measures to various time ranges

Use the new timeGranularity field to roll up measures to various time ranges. Introduced in API version 53.0, this type has been added to the GET/api/v1/profile/{dataModelName}/{ld}/calculated-insights/{ci-name} and GET/api/v1/insight/calculated-insights/(ci-name) API Developer Guide.

New Metadata types

Set data kit content details

Use the new reference object fields referenceObjectName and referenceObjectType on the existing DataPacketKitObject metadata type. Introduced in API version 53.0, these fields have been added to the Metadata API Developer Guide.

Add information about a data source

Use the new DataSourceField metadata type. Introduced in API version 52.0, this type has been added to the *Metadata API Developer Guide*.

Add data source field details

Use the new dataSourceFields field on the existing DataSourceObject metadata type to add information about the data source.Introduced in API version 53.0, this field has been added to the *Metadata API Developer Guide*.

Define the bundle of data streams

Use the new DataSourceBundleDefinition metadata type to define the bundle of streams that a user adds to a datakit. Introduced in API version 52.0, this type has been added to the *Metadata API Developer Guide*.

Store the bundle level mappings

Use the new DataSrcDataModelFieldMap metadata type to store the design-time bundle-level mappings for the Data Source Fields and Data Model Fields metadata. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

Create packages and publish on AppExchange

Use the new ActivationPlatform, ActivationPlatformField, ActvPfrmDataConnectorS3, ActvPlatformAdncIdentifier, and ActvPlatformFieldValue metadata types.

Navigate the Salesforce CDP Journey

Get familiar with Salesforce CDP by using the improved navigation structure and updated home page. Check out help topics, guides, developer documentation, and Trailhead modules, all in one place.

How: To see the new layout and restructured navigation, visit the help documentation home page for Salesforce CDP.



SEE ALSO:

Salesforce Help: Salesforce CDP (Right-click to view in a new tab or window.)

Trailhead: Get Started with Salesforce CDP Trailmix

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

Explore beta features like enhanced CMS workspaces and improved site search, and learn about how Digital Experiences is the renamed way to access the Salesforce CMS app in Lightning Experience.

IN THIS SECTION:

Salesforce CMS App Is Now Digital Experiences in Lightning Experience

After we added new Digital Experiences settings to the Salesforce CMS app in Lightning Experience, it didn't make sense to continue calling it CMS. So to keep in line with the Setup menu, we changed the name of the Salesforce CMS app to Digital Experiences. Use this app to see the site detail of your site, where you can see what underlying framework you're using, and to archive or unarchive your site.

Try Out Improved Site Search and Enhanced CMS Workspaces (Beta)

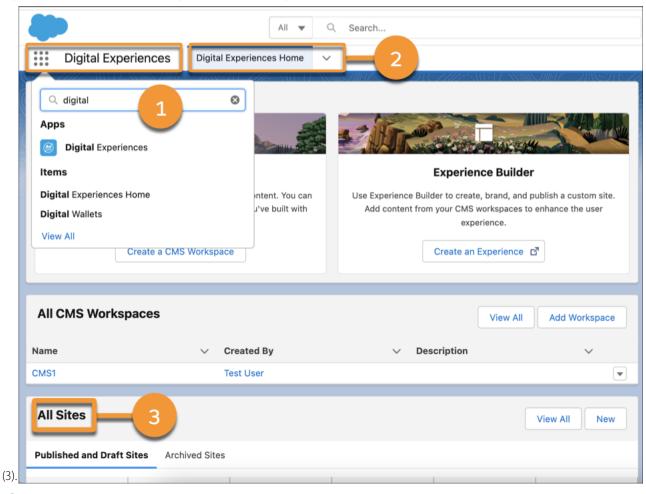
Create, manage, and publish content more easily with enhanced CMS workspaces. Then share your content with Build Your Own (LWR) sites and use improved site search to let visitors look for content contained in page components.

Salesforce CMS App Is Now Digital Experiences in Lightning Experience

After we added new Digital Experiences settings to the Salesforce CMS app in Lightning Experience, it didn't make sense to continue calling it CMS. So to keep in line with the Setup menu, we changed the name of the Salesforce CMS app to Digital Experiences. Use this app to see the site detail of your site, where you can see what underlying framework you're using, and to archive or unarchive your site.

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

How: Use the app launcher to access the Digital Experiences app (1). For the sake of consistency, we renamed CMS Home to Digital Experiences Home (2), and the All Experiences and CMS Experiences tabs are now called All Sites



Note: Just in case you can't quit typing Salesforce CMS in the app launcher, you still can. We'll redirect you to Digital Experiences when you choose the app.

Try Out Improved Site Search and Enhanced CMS Workspaces (Beta)

Create, manage, and publish content more easily with enhanced CMS workspaces. Then share your content with Build Your Own (LWR) sites and use improved site search to let visitors look for content contained in page components.

Where: This change applies to Lightning Experience in Developer Editions, and sandbox environments 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.

Connect REST API and Connect in Apex support site search and enhanced CMS workspaces (beta).

SEE ALSO:

Take Advantage of Improved Site Search and Enhanced CMS Workspaces (Beta)

Security, Identity, and Privacy

Keep your implementation running securely and smoothly with improved Platform-driven security solutions. Refine how users access your sites, apps, and implementations with domain improvements, built-in authenticators (generally available), single sign-on with Slack, and more authentication options. Preference Center (beta) joins the Privacy Center team, helping customers define their communication preferences. Shield products integrate with a wider range of features and clouds. View more metrics in Security Center. And the new Security Policies (beta) feature in Security Center helps you manage Health Check baselines from a central location for all tenants.

IN THIS SECTION:

Domains

To meet the latest browser requirements, enable enhanced domains. Disable redirections from your previous My Domain URLs. And you can enable Salesforce Edge Network in a Hyperforce org.

Identity and Access Management

Built-in authenticators are generally available. You can now configure multi-factor authentication (MFA) requirements for login as. Your employees and customers can access Salesforce through their Slack app. You can authorize access to Einstein Bot APIs with a connected app. And the OAuth 2.0 JWT bearer flow for server-to-server integration now supports high assurance settings. For enhanced security, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL.

Privacy Center

Create and publish forms to gather customer consent preferences using Preference Center (beta). Control how users access the forms and create as many unique preference forms as needed.

Salesforce Shield

Customize more of your security policy implementation with a host of Shield improvements. Write your own custom transaction security policy notification emails. Create Platform Event-triggered flows for Threat Detection events, and use the Permission Set Event (beta) to monitor changes to permissions assignments. Encrypt more data for Loyalty Management and Social Customer Studio.

Security Center

Create a Security Policy (beta) to deploy your custom Health Check Baseline to some or all of your connected tenants. Gain insight into your security posture with the Health Check Baseline metric and monitor 28 more permissions. Monitor all your connected apps, regardless of if OAuth is used for authentication. And there's enhanced navigation on your Security Center dashboard.

Other Security Changes

Salesforce now converts URLs saved without a protocol to hyperlinks that include the HTTPS protocol.

Domains

To meet the latest browser requirements, enable enhanced domains. Disable redirections from your previous My Domain URLs. And you can enable Salesforce Edge Network in a Hyperforce org.

IN THIS SECTION:

Disable Redirections from Your Previous My Domain

To test a change to your org's My Domain, you can temporarily prevent redirections from your org's previous URLs. When you enable enhanced domains or change your My Domain name, the URLs for your org change, and Salesforce redirects requests for your previous URLs to your new URLs. With this change, you can disable these redirections without removing your previous My Domain.

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.

Integrate Salesforce Edge Network on Hyperforce

Salesforce Edge Network is now available in Hyperforce. With Salesforce Edge Network, your users are closer and faster to Salesforce services around the globe.

HTTP Strict Transport Security (HSTS) Cache Duration Is Increased

To adopt the latest recommendations for HTTP Strict Transport Security (HSTS) preloading deployment, we increased the HSTS header max-age value to 63072000, or 2 years. HSTS redirects browsers to use HTTPS. Because HSTS is enabled, browsers cache that only HTTPS can be used on those domains. With this change, the cache is saved for 2 years. Previously, the cache was saved for 1 year.

Disable Redirections from Your Previous My Domain

To test a change to your org's My Domain, you can temporarily prevent redirections from your org's previous URLs. When you enable enhanced domains or change your My Domain name, the URLs for your org change, and Salesforce redirects requests for your previous URLs to your new URLs. With this change, you can disable these redirections without removing your previous My Domain.

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

How: From Setup, in the Quick Find box, enter My Domain, and then select My Domain. Under Routing, click Edit. Deselect Redirect previous My Domain URLs to your current My Domain, and save your changes.

SEE ALSO:

Salesforce Help: Disable or Remove Your Previous My Domain (Right-click to view in a new tab or window.)

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 all sandbox orgs except Public Cloud sandboxes. For production orgs, 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.

How: Before updating production, we recommend testing all My Domain changes in a sandbox.

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 (Right-click to view in a new tab or window.)

Knowledge Article: Plan for Salesforce Domain Changes: My Domain and Enhanced Domains
Release Updates

Integrate Salesforce Edge Network on Hyperforce

Salesforce Edge Network is now available in Hyperforce. With Salesforce Edge Network, your users are closer and faster to Salesforce services around the globe.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Salesforce Government Cloud, Customer 360 Data Manager, and some individual orgs are excluded from Salesforce Edge Network.

SEE ALSO:

Salesforce Help: What is Salesforce Edge Network? (Right-click to view in a new tab or window.)
Salesforce Help: Salesforce Edge Network (Right-click to view in a new tab or window.)

HTTP Strict Transport Security (HSTS) Cache Duration Is Increased

To adopt the latest recommendations for HTTP Strict Transport Security (HSTS) preloading deployment, we increased the HSTS header max-age value to 63072000, or 2 years. HSTS redirects browsers to use HTTPS. Because HSTS is enabled, browsers cache that only HTTPS can be used on those domains. With this change, the cache is saved for 2 years. Previously, the cache was saved for 1 year.

Where: This change applies to Salesforce Sites and Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: We recommend that you also enable HSTS preloading on custom domains that host content through your sites. HSTS adds protection to your custom domain by removing the opportunity for attacks during HTTP redirections.

SEE ALSO:

Salesforce Help: Enable HSTS Preloading on a Custom Domain (Right-click to view in a new tab or window.)

Identity and Access Management

Built-in authenticators are generally available. You can now configure multi-factor authentication (MFA) requirements for login as. Your employees and customers can access Salesforce through their Slack app. You can authorize access to Einstein Bot APIs with a connected app. And the OAuth 2.0 JWT bearer flow for server-to-server integration now supports high assurance settings. For enhanced security, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL.

IN THIS SECTION:

Built-In Authenticators as a Verification Method Are Now Generally Available

With new support for biometric methods, it's easier to verify identity in Salesforce. Your users can register biometric built-in authenticators such as Touch ID, Face ID, and Windows Hello. When users are challenged to verify their identity, including for multi-factor authentication and device activations, they get a prompt to use their built-in authenticator. Built-in authenticators are generally available.

Salesforce Support Users, Partner Support Users, and Subscribers with High-Assurance Sessions Bypass Multi-Factor Authentication During Log In As

To streamline user support, Salesforce support users, partner support users, and subscribers with high-assurance sessions can log in as other users without triggering multi-factor authentication (MFA) challenges. The Multi-Factor Authentication for UI Logins During Log In As setting enforces MFA only for support users and subscribers who don't have high-assurance sessions.

Let Users Access Salesforce with Slack Credentials

Simplify your users' login experience by enabling single sign-on (SSO) with a Slack authentication provider. With this SSO solution, your users can log in to your Salesforce org or Experience Cloud site with their Slack credentials, saving them time and clicks. They can also access their protected Slack data in Salesforce.

Give Authorized Access to Einstein Bot APIs

To authorize access to Einstein Bot APIs, you can assign a connected app the new chatbot_api OAuth scope. With this scope, the connected app is authorized to make service calls to Bot APIs over a public network.

JWT Bearer Flow Supports High Assurance Sessions

The OAuth 2.0 JWT bearer flow for server-to-server integration now supports high assurance settings. Previously, high assurance settings in user profiles weren't passed to access tokens retrieved during the JWT bearer flow.

Disable Users from Logging Into an Org or Experience Cloud Site with Login Credentials as URL Query String Parameters (Release Update)

To improve security, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Any users who try to do so are redirected to the login page. This update was first made available in Winter '22 and is enforced in Spring '22.

Securely Update Email Addresses and Reset Passwords (Release Update)

To ensure the security of your org, users must now reset their password before your changes to their email address and password become active. When a user resets the password using the provided link, the new email address is activated. Previously, the user's email address became active as soon as you saved the change. This update was first made available in Summer '21 and is enforced in Spring '22.

Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)

This release update enforces the documented behavior of bypassing MFA challenges for users who are assigned the user permission Multi-factor Authentication for User Interface Logins. This update was first made available in Winter '22 and is enforced in Spring '22.

Manage Single Sign-On User Mappings

To ensure that users are mapped correctly between Salesforce and a third-party identity provider, use the Auth.ConfirmUserRegistrationHandler interface.

Use a SAML Digest Algorithm Based on Your Request Signature Method

New SAML single sign-on (SSO) service provider configurations with a third-party identity provider use a digest algorithm based on the Request Signature Method (RSM). With this update, you can improve security and you still have the option to use SHA1 to ensure that existing SSO and SLO configurations don't break. Previously, all configurations used SHA1 as the default digest algorithm, regardless of the RSM.

Built-In Authenticators as a Verification Method Are Now Generally Available

With new support for biometric methods, it's easier to verify identity in Salesforce. Your users can register biometric built-in authenticators such as Touch ID, Face ID, and Windows Hello. When users are challenged to verify their identity, including for multi-factor authentication and device activations, they get a prompt to use their built-in authenticator. Built-in authenticators are generally available.

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

SEE ALSO:

Salesforce Help: Use a Built-In Authenticator as a Verification Method (Right-click to view in a new tab or window.)
Salesforce Help: Register a Built-In Authenticator for Identity Verification (Right-click to view in a new tab or window.)

Salesforce Support Users, Partner Support Users, and Subscribers with High-Assurance Sessions Bypass Multi-Factor Authentication During Log In As

To streamline user support, Salesforce support users, partner support users, and subscribers with high-assurance sessions can log in as other users without triggering multi-factor authentication (MFA) challenges. The Multi-Factor Authentication for UI Logins During Log In As setting enforces MFA only for support users and subscribers who don't have high-assurance sessions.

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

How: The Multi-Factor Authentication for UI Logins During Log In As setting is disabled by default. To enable it, contact Salesforce Customer Support. This setting applies when MFA is enforced by a permission or a session-level policy.

SEE ALSO:

Salesforce Help: Login Access (Right-click to view in a new tab or window.)
Require Multi-Factor Authentication for Logins to Subscriber Orgs (Update)

Let Users Access Salesforce with Slack Credentials

Simplify your users' login experience by enabling single sign-on (SSO) with a Slack authentication provider. With this SSO solution, your users can log in to your Salesforce org or Experience Cloud site with their Slack credentials, saving them time and clicks. They can also access their protected Slack data in Salesforce.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce Mobile App in all editions.

How: Set up a custom app in Slack, or use the global Slack app provided by Salesforce. Then configure a Slack authentication provider using information from the app.

SEE ALSO:

Salesforce Help: Configure a Slack Authentication Provider (Right-click to view in a new tab or window.)
Salesforce Help: Authentication Providers (Right-click to view in a new tab or window.)

Give Authorized Access to Einstein Bot APIs

To authorize access to Einstein Bot APIs, you can assign a connected app the new chatbot_api OAuth scope. With this scope, the connected app is authorized to make service calls to Bot APIs over a public network.

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

How: Create an OAuth connected app and assign it the chatbot api scope.

SEE ALSO:

Salesforce Help: Einstein Bots (Right-click to view in a new tab or window.)

Salesforce Help: Enable OAuth Settings for API Integration (Right-click to view in a new tab or window.)

Salesforce Help: OAuth Tokens and Scopes (Right-click to view in a new tab or window.)

JWT Bearer Flow Supports High Assurance Sessions

The OAuth 2.0 JWT bearer flow for server-to-server integration now supports high assurance settings. Previously, high assurance settings in user profiles weren't passed to access tokens retrieved during the JWT bearer flow.

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

SEE ALSO:

Salesforce Help: OAuth 2.0 JWT Bearer Flow for Server-to-Server Integration (Right-click to view in a new tab or window.)

Salesforce Help: Require High-Assurance Session Security for Sensitive Operations (Right-click to view in a new tab or window.)

Disable Users from Logging Into an Org or Experience Cloud Site with Login Credentials as URL Query String Parameters (Release Update)

To improve security, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Any users who try to do so are redirected to the login page. This update was first made available in Winter '22 and is enforced in Spring '22.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce Mobile App in all editions.

When: This update was first made available in Winter '22 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Who: This update impacts you if your users or integrations log in or authenticate by passing un= and pw= as query string parameters to the login URL.

How: 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 any login or authentication issues. If users are redirected to the login page or see a redirect status code, you must change your login and authentication integrations.

SEE ALSO:

Release Updates

Securely Update Email Addresses and Reset Passwords (Release Update)

To ensure the security of your org, users must now reset their password before your changes to their email address and password become active. When a user resets the password using the provided link, the new email address is activated. Previously, the user's email address became active as soon as you saved the change. This update was first made available in Summer '21 and is enforced in Spring '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 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: When you change an org user's email address and enable the Generate new password and notify user setting, the user receives a password reset link at their new email address. Before the new email address becomes active, the user must create a new password.

The new process ensures that every user's email address is properly verified before being changed, while providing an easy user experience that does not require two separate steps.

How: Your org admins will now be able to securely change a user's email address and reset their password in the same operation.

SEE ALSO:

Release Updates

Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)

This release update enforces the documented behavior of bypassing MFA challenges for users who are assigned the user permission Multi-factor Authentication for User Interface Logins. This update was first made available in Winter '22 and is enforced in Spring '22.

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.

When: This update was first available in Winter '22 and is enforced in Spring '22. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When a user logs in to Salesforce through an SSO Authentication Provider, the expected and documented behavior is to bypass MFA enforcement in Salesforce, because typically MFA is enforced within the login process of the SSO provider.

In some instances, Salesforce was enforcing MFA for users who had logged in via an SSO Auth Provider, which resulted in those users completing MFA twice.

This release update enforces the documented behavior, so that users who have the Multi-factor Authentication for User Interface Logins user permission and who log in through an SSO Auth Provider are no longer prompted to complete an MFA challenge in Salesforce.

How: Users who log in through an SSO Auth Provider are no longer prompted to complete an MFA challenge in Salesforce.

To enforce MFA in Salesforce for users who log in through an SSO Auth Provider, configure the assigned user profile to require a High Assurance session security level at login, and make sure that Multi-Factor Authentication is in the High Assurance Column.

SEE ALSO:

Release Updates

Salesforce Help: Enable MFA with Session Security Levels (Right-click to view in a new tab or window.)

Manage Single Sign-On User Mappings

To ensure that users are mapped correctly between Salesforce and a third-party identity provider, use the Auth.ConfirmUserRegistrationHandler interface.

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

SEE ALSO:

Apex: New and Changed Items

Apex Reference Guide: ConfirmUserRegistrationHandler Interface

Use a SAML Digest Algorithm Based on Your Request Signature Method

New SAML single sign-on (SSO) service provider configurations with a third-party identity provider use a digest algorithm based on the Request Signature Method (RSM). With this update, you can improve security and you still have the option to use SHA1 to ensure that existing SSO and SLO configurations don't break. Previously, all configurations used SHA1 as the default digest algorithm, regardless of the RSM.

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

How: When you set up SSO with Salesforce as a service provider, you can select either RSA-SHA1 or RSA-SHA256 for your RSM. For new configurations, the RSM now determines the digest algorithm. For example, if you set the RSM to RSA-SHA256, your digest algorithm is automatically set to SHA256. For existing configurations, you can decide whether to enable this new behavior. By default, your configuration still uses SHA1 as the digest algorithm. To update it, on the SAML Single Sign-On Settings page, select **Use digest algorithm based on Request Signature Method**.



Note: Non-English versions of this checkbox indicate that this change can't be undone, but you can undo it by deselecting the checkbox.

When you configure single logout (SLO) for a new or existing configuration, select **Use Selected Request Signature Method for Single Logout**. Your SLO configuration then uses a digest algorithm based on the RSM.

SEE ALSO:

Salesforce Help: Configure Salesforce as the Service Provider with SAML Single Sign-On Salesforce Help: Configure SAML Settings for Single Logout When Salesforce is the Service Provider

Privacy Center

Create and publish forms to gather customer consent preferences using Preference Center (beta). Control how users access the forms and create as many unique preference forms as needed.

IN THIS SECTION:

Build and Publish Consent Forms with Preference Center (Beta)

Use Preference Center to create, edit, and publish self-service forms so that your customers can define their communication preferences.

Build and Publish Consent Forms with Preference Center (Beta)

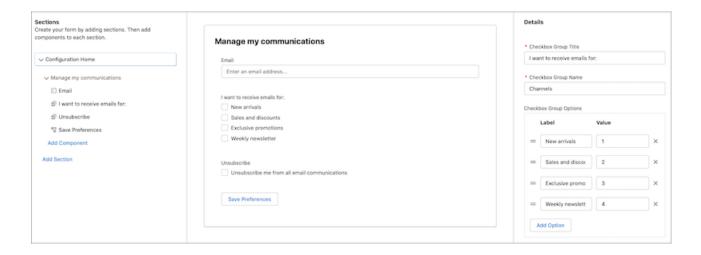
Use Preference Center to create, edit, and publish self-service forms so that your customers can define their communication preferences.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: Create a permission set and Apex class to use with Preference Center. Then, from Setup, in the Quick Find box, enter *Privacy Preference Center*. Click **New** to create a form in Preference Center Builder. Publish, delete, or create new versions of forms from the Preference Center dashboard.

Generate an access token in Preference Center Builder or Apex so that users can access your forms without authenticating. You can also configure allowed domains, and then host your forms on your Experience Sites.



SEE ALSO:

Salesforce Help: Use Preference Center to Gather Communication Preferences (Beta)(Right-click to view in a new tab or window.)

Salesforce Shield

Customize more of your security policy implementation with a host of Shield improvements. Write your own custom transaction security policy notification emails. Create Platform Event-triggered flows for Threat Detection events, and use the Permission Set Event (beta) to monitor changes to permissions assignments. Encrypt more data for Loyalty Management and Social Customer Studio.

IN THIS SECTION:

Event Monitoring

Threat Detection is now compatible with Platform Event-triggered flows so that you can automate responses to detected threat events. Write your own custom Transaction Security policy notification emails and populate them with actual event data to help you respond to triggered policies faster. And reap organization-wide efficiencies when you monitor permission set and permission group changes with the new Permission Set Event (beta).

Shield Platform Encryption

Shield Platform Encryption serves up support for an even wider range of data. You can now encrypt the Member Name field on the Loyalty Program Group Member Relationship object. Social Customer Service now supports encryption across several fields on the Social Persona and Social Post objects. And encryption for the User Email field is now generally available.

Event Monitoring

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IN THIS SECTION:

Craft Custom Transaction Security Notification Emails

Transaction Security policies are flexible by design. New custom email notifications for triggered policies offer the same flexibility. You can now create custom email content that sends event-specific information. You can write your own notification text to direct your teams to take specific actions, and include hand-selected event data that gives teams a head-start on their follow-up tasks.

Unlock Automated Responses to Detected Threat Events with Flows

You can now create Platform Event-triggered flows that are triggered by ApiAnomalyEvent, CredentialStuffingEvent, ReportAnomalyEvent, and SessionHijackingEvent. Use flows to take proactive measures such as to send email notifications to security teams, deactivate affected users, or reset passwords. And you can generate cases for follow-up investigations that help you understand the nature of the detected event and build resiliency into your implementation.

Monitor Changes to Permission Sets and Permission Set Groups (Beta)

Create expanded transaction security policies for permission set events so that you can monitor changes in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create transaction security policies to block users from being assigned permissions for the supported user assignment types. You can also notify admins of the attempted permission assignment.

Identify Connected Apps that Send API Requests

Use the new CONNECTED_APP_ID field on the API Total Usage event type to get the ID of the Connected App sending API requests. You can use the Connected App ID to better understand where requests are coming from and identify connected or remote apps that make requests to deprecated API versions.

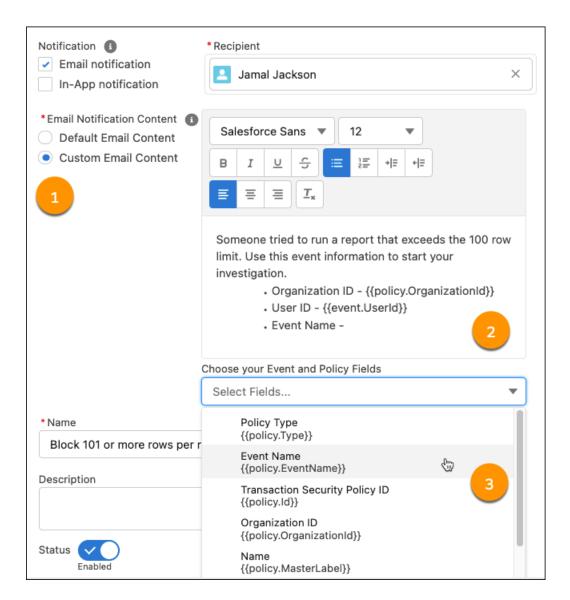
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: Create your custom email content when you create notifications for a policy.



Select **Email notification** and **Custom Email Content** (1). Then write a personalized message for your chosen recipient (2), and flag event-specific field data to include in the email (3). When the policy is triggered, the notification is populated with actual event data. As always, remember the principle of least privilege, and only include event data that your recipient is authorized to view.

SEE ALSO:

Salesforce Help: Enhanced Transaction Security Actions and Notifications (Right-click to view in a new tab or window.)
You Asked for It!

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You can now create Platform Event-triggered flows that are triggered by ApiAnomalyEvent, CredentialStuffingEvent, ReportAnomalyEvent, and SessionHijackingEvent. Use flows to take proactive measures such as to send email notifications to security teams, deactivate affected users, or reset passwords. And you can generate cases for follow-up investigations that help you understand the nature of the detected event and build resiliency into your implementation.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: Create a platform event-triggered flow. From the Start element, click **Choose Platform Event**, and choose ApiAnomalyEvent, CredentialStuffingEvent, ReportAnomalyEvent, or SessionHijackingEvent to trigger your flow.

SEE ALSO:

Salesforce Help: Threat Detection (Right-click to view in a new tab or window.)

Platform Events Developer Guide: Subscribe to Platform Event Messages with Flows

Monitor Changes to Permission Sets and Permission Set Groups (Beta)

Create expanded transaction security policies for permission set events so that you can monitor changes in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create transaction security policies to block users from being assigned permissions for the supported user assignment types. You can also notify admins of the attempted permission assignment.

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



Note: This feature is 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: Permission Set Event is available to customers who already purchased Salesforce Shield or Event Monitoring add-on subscriptions.

How: From Setup, in the Quick Find box, enter *Transaction Security*, and then select **Transaction Security Policies**. To create your policy using Condition Builder or Apex, select **Permission Set Event (beta)**, and then select your policy conditions and actions. And from Event Manager, set up streaming and storing for the Permission Set Event. Event data from PermissionSetEvent is stored in PermissionSetEventStore.

You can create transaction security policies to block users from being assigned these permissions.

- Assign Permission Sets
- Author Apex
- Customize Application
- Manage Encryption Keys
- Manage Internal Users
- Manage Password Policies
- Manage Profiles and Permission Sets
- Manage Roles
- Manage Sharing
- Manage Users
- Modify All Data
- Password Never Expires
- Reset User Passwords and Unlock Users
- View All Data

Notifications are available for all supported permissions.

SEE ALSO:

Salesforce Help: PermissionSetEventStore Policies (Beta) (Right-click to view in a new tab or window.)

Developer Guide: PermissionSetEvent (Beta) (Right-click to view in a new tab or window.)

Developer Guide: PermissionSetEventStore (Beta) (Right-click to view in a new tab or window.)

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SEE ALSO:

SOAP API Developer Guide: API Total Usage

Shield Platform Encryption

Shield Platform Encryption serves up support for an even wider range of data. You can now encrypt the Member Name field on the Loyalty Program Group Member Relationship object. Social Customer Service now supports encryption across several fields on the Social Persona and Social Post objects. And encryption for the User Email field is now generally available.

IN THIS SECTION:

Encrypt Users' Email Addresses (Generally Available)

Email addresses are a critical piece of data used in login flows, customer cases, sales, purchasing, and countless other business processes. They're also considered personally identifiable information. Shield Platform Encryption offers you an extra layer of protection for user email addresses when they're stored at rest. The User Email field, now generally available, supports probabilistic and deterministic encryption schemes, helping you preserve critical business functionality.

Encrypt Social Persona and Social Post Fields

If you use Social Customer Service to streamline your case intake process or lead pipeline, give your users' personally identifiable information an extra layer of protection. You can now encrypt fields on the Social Persona and Social Post objects.

Encrypt Your Loyalty Program Member Data

Add another layer of security to your users' personally identifiable information. You can now encrypt the Member Name field of the Loyalty Program Group Member Relationship object. The Member Name field can be encrypted with probabilistic encryption scheme and deterministic encryption scheme.

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

Who: This change is available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

How: From Setup, in the Quick Find box, enter *Encryption Policy*, and then select **Encrypt Fields**. Click **Edit**, select **Email** under the User section, and then choose your encryption scheme.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt? (Right-click to view in a new tab or window.)

Encrypt Social Persona and Social Post Fields

If you use Social Customer Service to streamline your case intake process or lead pipeline, give your users' personally identifiable information an extra layer of protection. You can now encrypt fields on the Social Persona and Social Post objects.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions and have Social Customer Service enabled and connected to a Marketing Cloud Social service.

Why: You can now encrypt these Social Customer Service fields.

- Social Persona—Bio, Profile URL, Provider External Picture URL, Real Name
- Social Post—Attachment URL, Headline, Message, Post URL, Social Handle

Most fields support probabilistic and deterministic encryption schemes.

How: From Setup, on the Encryption Policy page, click Encrypt Fields. Then click Edit, and select the fields that you want to encrypt.

SEE ALSO:

Encrypt PII Data in Social Customer Service

Salesforce Help: Which Standard Fields Can I Encrypt? (Right-click to view in a new tab or window.)

Encrypt Your Loyalty Program Member Data

Add another layer of security to your users' personally identifiable information. You can now encrypt the Member Name field of the Loyalty Program Group Member Relationship object. The Member Name field can be encrypted with probabilistic encryption scheme and deterministic encryption scheme.

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

Who: This change applies to customers who have both Shield Platform Encryption and Loyalty Management add-on subscriptions.

How: On the Encryption Policy page in Setup, click Encrypt Fields. Then click Edit, and select the Member Name field.

SEE ALSO:

Improve Security of Your Member Data with Shield Platform Encryption

Salesforce Help: Which Standard Fields Can I Encrypt? (Right-click to view in a new tab or window.)

Security Center

Create a Security Policy (beta) to deploy your custom Health Check Baseline to some or all of your connected tenants. Gain insight into your security posture with the Health Check Baseline metric and monitor 28 more permissions. Monitor all your connected apps, regardless of if OAuth is used for authentication. And there's enhanced navigation on your Security Center dashboard.

IN THIS SECTION:

Monitor All Connected Apps

Now you can track all your connected apps in Salesforce. Previously, Security Center only monitored connected apps that use OAuth for authentication.

Deploy Security Policies (Beta)

Use the new Security Policy feature to upload a custom Health Check baseline and deploy it to the tenants of your choosing.

See More Metrics in Security Center

Now you can track changes to Security Health Check Baselines and Mobile Security Policies in Security Center. And you can monitor 28 more user permissions for a total of 42.

Monitor All Connected Apps

Now you can track all your connected apps in Salesforce. Previously, Security Center only monitored connected apps that use OAuth for authentication.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

Who: This change is available to users with the Security Center add-on subscription.

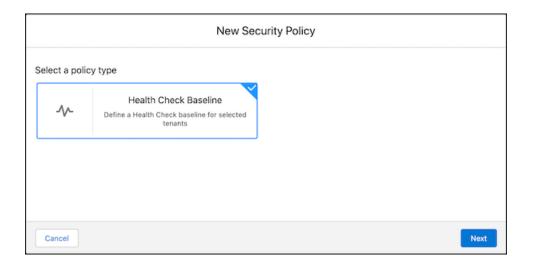
Deploy Security Policies (Beta)

Use the new Security Policy feature to upload a custom Health Check baseline and deploy it to the tenants of your choosing.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

Who: This change is available to users with the Security Center add-on subscription.

How: From your Security Center dashboard, click the Security Policies tab, and then click **New Security Policy**. Follow the prompts to upload your baseline, select the tenants that you want the policy to apply to, and then make your uploaded baseline the default.



SEE ALSO:

Salesforce Help: Define and Deploy Security Policies (Beta) (Right-click to view in a new tab or window.)

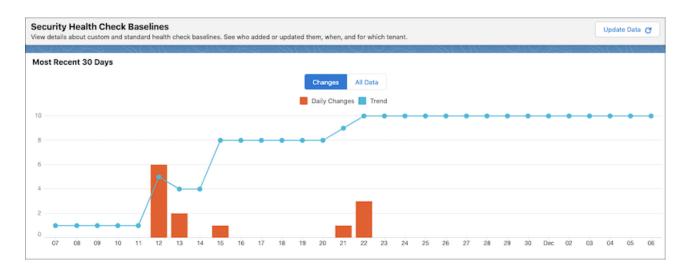
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Now you can track changes to Security Health Check Baselines and Mobile Security Policies in Security Center. And you can monitor 28 more user permissions for a total of 42.

Where: Security Center is available in Enterprise, Performance, Unlimited, and Developer editions as an add-on subscription.

Who: This change is available to users with the Security Center add-on subscription.

How: Check out the new metric detail pages from your Security Center dashboard and find the Security Health Check Baseline in the Configuration category.



SEE ALSO:

Salesforce Help: Security Center Metrics (Right-click to view in a new tab or window.)

Other Security Changes

Salesforce now converts URLs saved without a protocol to hyperlinks that include the HTTPS protocol.

IN THIS SECTION:

Create HTTPS Hyperlinks by Default

When you save content in Salesforce that contains a URL without a protocol, Salesforce converts it to a hyperlink by assigning the HTTPS protocol. For example, if you type example.com in a Chatter post, Salesforce converts it to https://example.com when you save the post. Previously, Salesforce assigned the HTTP protocol for hyperlinks. If a link requires the HTTP protocol, enter the http:// prefix as part of the URL.

Create HTTPS Hyperlinks by Default

When you save content in Salesforce that contains a URL without a protocol, Salesforce converts it to a hyperlink by assigning the HTTPS protocol. For example, if you type <code>example.com</code> in a Chatter post, Salesforce converts it to https://example.com when you save the post. Previously, Salesforce assigned the HTTP protocol for hyperlinks. If a link requires the HTTP protocol, enter the http:// prefix as part of the URL.

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

Why: Salesforce requires HTTPS, and the HTTPS protocol is the standard for security across the internet. HTTPS uses Transport Layer Security (TLS), which makes it more secure than HTTP. TLS is designed to facilitate data security and privacy for communications over the internet.

Service

Enjoy a range of new Service Cloud features that help you and your team deliver efficient, flexible service. Use Omni-Channel Flows to dynamically route customer calls and messages to the preferred agent or bot. Let contact center supervisors access real-time Amazon Connect metrics and listen in on calls with Service Cloud Voice. Build fully functional bots with a new bot template and the user-friendly Conversation Canvas, or use the Einstein Bots API platform. Swiftly triage incidents with new Incident Management features like SLA management tools and Omni-Channel support. And meet staffing needs and make scheduling decisions with new tools in your Workforce Engagement toolbox, including historical adherence metrics.

IN THIS SECTION:

Channels

Enhancements to the Voice channel improve the experience for contact center admins, supervisors, and agents.

Routing

Manage routing more efficiently with Omni Supervisor enhancements. Monitor and manage offline agents in the Agents tab. Focus supervisors on the right queues and skills in the Queues Backlog, Assigned Work, and Skills Backlog tabs.

Einstein for Service

Now you can include up to 10 fields in your Article Recommendations model and calculate the segment count record for Case Classification. Einstein Bots redesigned the Bot Builder to be more user-friendly, expanded bot availability during retraining, and opened up more bot connections with the API platform.

Workforce Engagement

Meet call center staffing needs and improve scheduling with long-term forecasts, long-term capacity plans, and historical adherence metrics. Planners are more productive when they assign and update shifts in bulk, locate shifts using color, and access configuration tools in one place. A new scheduling rule limits less desirable shift assignments to keep your agents happy. And new language support benefits all Workforce Engagement admins and users in your call center.

Incident Management

When an urgent incident affects your customers, Incident Management can do the heavy lifting to eliminate potential complications before they become showstoppers. Employ out of-the-box Incident Management page layouts complete with SLA management tools to get to work right away. Assess the full impact of an incident with assets and related lists. Make sure the right eyes are on the incident as soon as it happens with incidents supported in Omni-Channel. Use work plans and work steps to quickly work toward incident resolution.

Swarming (Beta)

Swarming is just what it sounds like: Agents can come together with cross-functional experts in a tracked Slack channel to resolve cases faster than ever. Swarming with the power of Service Cloud gives agents the tools they need to involve other experts and seamlessly log collaboration, participation, and ownership. This new collaboration framework replaces a tiered support approach and helps you build trust with your customers when it matters most.

Service Slack App Release Notes

Tackle customer issues as a team, directly from Slack.

Knowledge

It's easier to share knowledge article links that point to the latest version. Images now open to full size to zoom in on important details.

Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

Channels

Enhancements to the Voice channel improve the experience for contact center admins, supervisors, and agents.

IN THIS SECTION:

Voice

Route calls to the right agents with Omni-Channel flows. Enhance the supervisor experience by enabling supervisors to listen in on calls, filtering which queues and skills they see in Omni Supervisor, and giving them access to real-time metrics in Amazon Connect. Get an improved agent experience with org-wide access to voice call recordings and voice call records, and call routing that respects Omni-Channel agent capacity. Get up and running faster with a streamlined setup.

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IN THIS SECTION:

Route Calls with Omni-Channel Flows (Generally Available)

Dynamically route calls to the correct agent by defining routing rules in the same place that you configure them 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 give agents more context about a conversation when they accept a call. This feature, which is now generally available, includes some changes since the beta release.

Boost Quality Assurance with Supervisor Call Monitoring

Make it easier for supervisors to improve a contact center's call handling with Call Monitoring from the Agents tab in Omni Supervisor. Supervisors can choose to listen in to any ongoing call from Omni Supervisor.

Launch Amazon Real-Time Metrics Dashboard from Omni Supervisor

Identify opportunities and uncover issues in your contact center by employing real-time metrics. For example, reassign agents to queues that are currently and unexpectedly experiencing heavy call volumes. To get the latest metrics about your contact center, open Amazon Connect's Real-Time Metrics dashboard directly from Omni Supervisor. The dashboard shows key metrics such as the agents online, handled and abandoned calls, and more. It also provides an option for supervisors to listen in on active calls.

Track Agent Downtime with Presence Status Syncing

Keep your agents' busy statuses in sync across Amazon Connect and Omni-Channel with Presence Status Mapping. Now you can report on your agents' Omni-Channel break statuses from Amazon Connect. This automatic syncing occurs when the agent explicitly changes their status.

Share Voice Calls with Universal Call Recording

Get users up to speed faster with increased access to call recordings. Universal Call Recording lets anyone with a Salesforce user license listen to a voice call recording from any Contact Center that they can access. Previously, call owners with Voice Call Recording user permission could listen only to their Contact Center's voice calls.

Respect Agent Capacity for Voice Calls (Beta)

Let agents work across multiple channels with voice call routing that respects the current agent capacity as set by Omni-Channel. Previously, voice calls routing ignored agent capacity and delivered calls regardless of an agent's capacity. With this change, if an agent's capacity is greater than 0%, incoming calls are automatically declined so that the agent can focus on delivering excellent customer service. If your agents are helping customers on a chat, the incoming call is routed to the next available agent.

Match Callers to End User Records with Phone Channels (Generally Available)

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 or account, all future calls from that number are associated with that contact or account. This feature, which is now generally available, includes some changes since the beta release.

Transfer Callers to Available Agents

Agents can now see who's online and available when they want to transfer a call. No more long customer wait times and transfer only to agents who are free to take the call. To display agent availability information for transferred calls, Salesforce users must be mapped to the telephony provider users.

Make Outbound Calls Correctly With Phone Number Auto-Formatting

Phone number auto-formatting standardizes phone numbers to E.164 format for more accurate dialing. Previously, misplaced or duplicate special characters caused an error that canceled the call.

Create Custom Call Settings for Your Agents in Omni-Channel

Make it faster and easier for agents to select an outbound calling number, call from a specific queue, and more. Service Cloud Voice with Partner Telephony now supports Lightning web components created by a partner telephony provider in the Omni-Channel utility.

Monitor Service Cloud Voice Issues with Amazon CloudWatch

Ensure that your Service Cloud Voice implementation is running smoothly with new Amazon CloudWatch dashboards and alarms. Monitor the health of your contact center with two new dashboards. Fine-tune the alarms so that they trigger when something needs attention, such as reaching Amazon's concurrent call limit or for Lambda function errors. Notify the right people about these events with the new RealtimeAlertEvent platform event.

Set Up Voice with Partner Telephony from Amazon Connect in Fewer Steps

Get your contact center up and running faster with simplified, automated setup for Service Voice Cloud with Partner Telephony from Amazon Connect.

Improve Transcriptions with Contact Lens for Amazon Connect (Pilot)

Service Cloud Voice can now transcribe calls longer than 15 minutes. This pilot feature removes the previous system limitation by transitioning from Amazon Transcribe to Contact Lens for Amazon Connect.

Enhance Transcriptions with Custom Vocabulary and Vocabulary Filters

Identify and update domain-specific terms in your Salesforce transcriptions by using a custom vocabulary in Amazon Transcribe. Additionally, you can mask or remove sensitive or profane terms in your transcriptions by using vocabulary filters.

Mitigate the Log4j Security Vulnerability in an Amazon Contact Center

Upgrade your Amazon Connect contact center to version 7.2. The new version updates the KVSTranscriber Lambda log4j library to 2.17.1, which mitigates Apache log4j security issues. To address this security vulnerability, we highly recommend that you apply this update.

Get the Enhanced Service Cloud Voice Experience

Get the most out of Service Cloud Voice with continued enhanced functionality and new features. Now you can keep your agents' statuses, routing queues, and phone channels in sync across Amazon Connect and Salesforce. It's easier to add a phone number to your contact center in Salesforce, and there's much more.

Route Calls with Omni-Channel Flows (Generally Available)

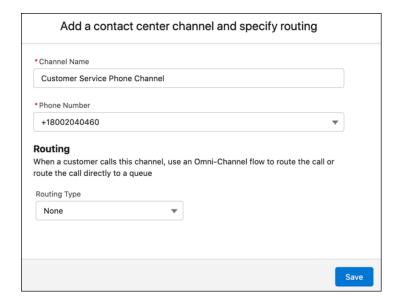
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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

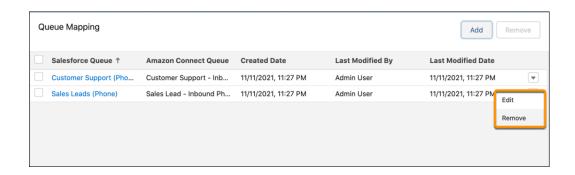
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

Why: This generally available version contains these enhancements to the previous beta version.

To set up routing for a phone channel, you specify the routing type (Queue or Omni-Channel Flow) and enter details.



You can edit and remove mappings between Salesforce queues and telephony provider queues.



• The Queues Backlog tab of Omni Supervisor shows more timely and accurate stats for missed and abandoned calls in Amazon Connect. Now, after the call ends, the stats are updated within seconds, not minutes.

How: To enable more timely and accurate stats, upgrade your Amazon Connect contact center to 8.0.

SEE ALSO:

Salesforce Help: Omni-Channel Flows (Right-click to view in a new tab or window.)
Salesforce Help: Update Your Contact Center (Right-click to view in a new tab or window.)

Boost Quality Assurance with Supervisor Call Monitoring

Make it easier for supervisors to improve a contact center's call handling with Call Monitoring from the Agents tab in Omni Supervisor. Supervisors can choose to listen in to any ongoing call from Omni Supervisor.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: To listen in to a call or read the call transcript, from Omni Supervisor, expand a call and click Monitor. You can listen in to only one call at a time. When a supervisor listens in to the call, the agent is notified in the chat transcript, but the customer isn't.

SEE ALSO:

Salesforce Help: Listen In to Voice Calls in a Partner Telephony Contact Center (Right-click to view in a new tab or window.)

Launch Amazon Real-Time Metrics Dashboard from Omni Supervisor

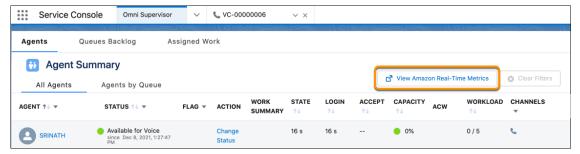
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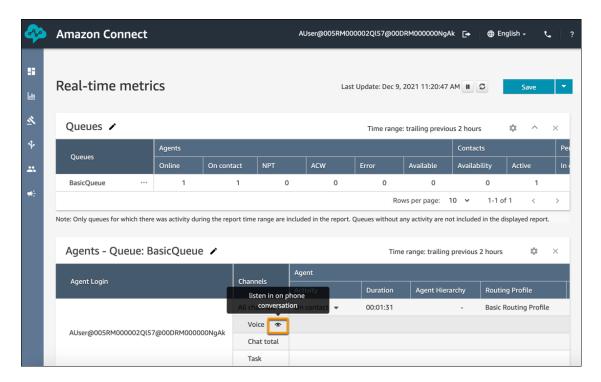
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Who: Only users with the Contact Center Admin permission set can see the View Amazon Real-Time Metrics button.

How: To open the Real-Time Metrics dashboard in Amazon Connect, click **View Amazon Real-Time Metrics** in Omni Supervisor.



In addition to viewing real-time metrics, click the Listen In On Phone Conversation button in the Agents table of the dashboard to listen in on an agent's active voice call.



SEE ALSO:

Salesforce Help: View Real-Time Metrics about Your Amazon Connect Contact Center (Right-click to view in a new tab or window.)

Track Agent Downtime with Presence Status Syncing

Keep your agents' busy statuses in sync across Amazon Connect and Omni-Channel with Presence Status Mapping. Now you can report on your agents' Omni-Channel break statuses from Amazon Connect. This automatic syncing occurs when the agent explicitly changes their status.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

Service Cloud Voice with Amazon Connect

Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

Salesforce Help: Map Your Presence Statuses to Amazon Connect

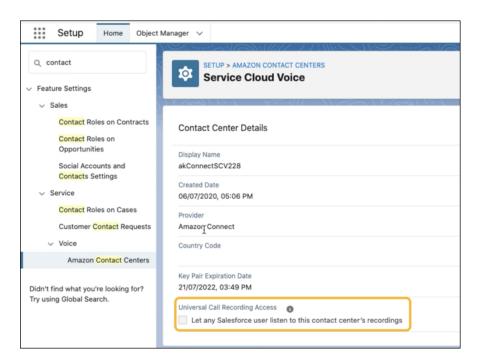
Share Voice Calls with Universal Call Recording

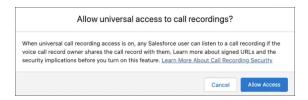
Get users up to speed faster with increased access to call recordings. Universal Call Recording lets anyone with a Salesforce user license listen to a voice call recording from any Contact Center that they can access. Previously, call owners with Voice Call Recording user permission could listen only to their Contact Center's voice calls.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: From Setup, in the Quick Find box, enter *Voice*, and then select **Amazon Contact Centers**. Edit your contact center details and select the checkbox under Universal Call Recording Access, and then click **Save**.





Review the link for call recording security best practices, then click **Allow Access** to apply your edits. Users outside of a contact center can navigate to a Service Cloud Voice call record, but can't listen to the associated recording if you keep the checkbox unchecked.

Respect Agent Capacity for Voice Calls (Beta)

Let agents work across multiple channels with voice call routing that respects the current agent capacity as set by Omni-Channel. Previously, voice calls routing ignored agent capacity and delivered calls regardless of an agent's capacity. With this change, if an agent's capacity is greater than 0%, incoming calls are automatically declined so that the agent can focus on delivering excellent customer service. If your agents are helping customers on a chat, the incoming call is routed to the next available agent.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect



How: From Setup, in the Quick Find box, enter *Amazon Setup* or *Partner Telephony Setup* depending on your Service Cloud Voice telephony model. Enable **Respect Agent Capacity**.

SEE ALSO:

Salesforce Help: Respect Agent Capacity for Voice Calls (Beta) (Right-click to view in a new tab or window.)

Match Callers to End User Records with Phone Channels (Generally Available)

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 or account, all future calls from that number are associated with that contact or account. This feature, which is now generally available, includes some changes since the beta release.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

Why: This generally available version contains these enhancements to the previous beta version. Create a default phone channel to link outbound calls to an End User record. You can use default phone channels for inbound calls if it's not important to capture which contact center was called and who the caller was. You can also use the default channel to set up default routing across all contact centers.

How: From Setup, in the Quick Find box, enter *Amazon Setup* or *Partner Telephony Setup* depending on your Service Cloud Voice telephony model. Enable **Match Callers to End User Records**. To configure a default phone channel and set up its routing, click **Edit** under Configure Default Phone Channel.



SEE ALSO:

Salesforce Help: Configure Caller ID for Your Contact Center (Right-click to view in a new tab or window.)
Salesforce Help: Create a Default Phone Channel (Right-click to view in a new tab or window.)

Transfer Callers to Available Agents

Agents can now see who's online and available when they want to transfer a call. No more long customer wait times and transfer only to agents who are free to take the call. To display agent availability information for transferred calls, Salesforce users must be mapped to the telephony provider users.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

Salesforce Help: Add Callers or Transfer Calls (Right-click to view in a new tab or window.)
Salesforce Help: Map Your Existing Salesforce Users to Telephony Provider Users

Make Outbound Calls Correctly With Phone Number Auto-Formatting

Phone number auto-formatting standardizes phone numbers to E.164 format for more accurate dialing. Previously, misplaced or duplicate special characters caused an error that canceled the call.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: From the Omni-Channel popover window, select the Phone tab and enter the number. When you press **Call**, Service Cloud Voice pulls the country code from your contact center settings and automatically converts the number to E.164 format.

Create Custom Call Settings for Your Agents in Omni-Channel

Make it faster and easier for agents to select an outbound calling number, call from a specific queue, and more. Service Cloud Voice with Partner Telephony now supports Lightning web components created by a partner telephony provider in the Omni-Channel utility.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model:

Service Cloud Voice with Partner Telephony

How: To add a component to Omni-Channel, install your partner telephony's managed package from App Exchange.

Monitor Service Cloud Voice Issues with Amazon CloudWatch

Ensure that your Service Cloud Voice implementation is running smoothly with new Amazon CloudWatch dashboards and alarms. Monitor the health of your contact center with two new dashboards. Fine-tune the alarms so that they trigger when something needs attention, such as reaching Amazon's concurrent call limit or for Lambda function errors. Notify the right people about these events with the new RealtimeAlertEvent platform event.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: Update your contact center to version 8.0. Refer to Customer Alerts in the Voice Implementation Guide for details on how to configure and use this feature.

SEE ALSO:

Salesforce Help: Update Your Contact Center (Right-click to view in a new tab or window.)

Voice Implementation Guide: Customer Alerts with CloudWatch (Right-click to view in a new tab or window.)

Platform Events Developer Guide: RealtimeAlertEvent (Right-click to view in a new tab or window.)

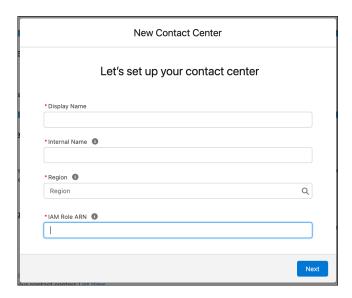
Set Up Voice with Partner Telephony from Amazon Connect in Fewer Steps

Get your contact center up and running faster with simplified, automated setup for Service Voice Cloud with Partner Telephony from Amazon Connect.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model:

Service Cloud Voice with Partner Telephony from Amazon Connect

How: When you set up Voice, specify the ARN for your IAM role in Amazon Connect. Enter the IAM role ARN in Amazon Connect that's associated with the correct policy information. Salesforce then accesses your Amazon Connect instance to build out your contact center automatically.



SEE ALSO:

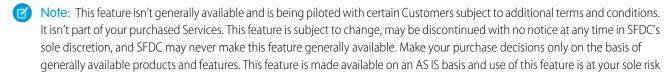
Salesforce Help: Set Up Service Cloud Voice with Partner Telephony from Amazon Connect (Right-click to view in a new tab or window.)

Improve Transcriptions with Contact Lens for Amazon Connect (Pilot)

Service Cloud Voice can now transcribe calls longer than 15 minutes. This pilot feature removes the previous system limitation by transitioning from Amazon Transcribe to Contact Lens for Amazon Connect.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect



How: Verify that your contact center is updated to version 8.0. Then use our new contact flows or enable Contact Lens in your existing flows. These new flows have the same name as the original sample flows, but have the "for Contact Lens" suffix. For instance, Inbound Flow with Transcription becomes Inbound Flow with Transcription for Contact Lens. If you're using existing flows, remove the **kvsConsumerTrigger** block and enable Contact Lens real-time analytics in your recording block. During this pilot, Contact Lens transcripts for transferred voice calls aren't supported.

SEE ALSO:

Salesforce Help: Update Your Contact Center (Right-click to view in a new tab or window.)

Salesforce Help: Improve Transcriptions with Contact Lens for Amazon Connect (Right-click to view in a new tab or window.)

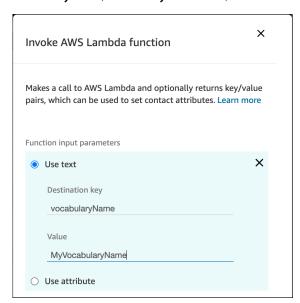
Enhance Transcriptions with Custom Vocabulary and Vocabulary Filters

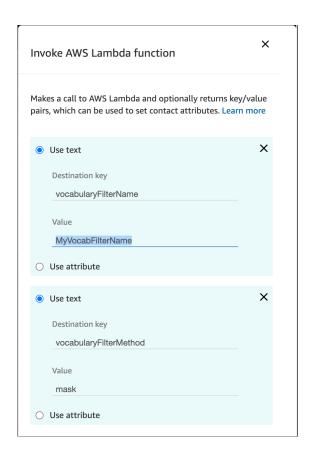
Identify and update domain-specific terms in your Salesforce transcriptions by using a custom vocabulary in Amazon Transcribe. Additionally, you can mask or remove sensitive or profane terms in your transcriptions by using vocabulary filters.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: Set up custom vocabulary and vocabulary filters in Amazon Transcribe. Then configure the contact flows that invoke the **kvsConsumerTrigger** Lambda function to use the custom vocabulary and vocabulary filters whenever a voice call occurs. Use the **vocabularyName**, **vocabularyFilterName**, and **vocabularyFilterMethod** parameters to specify vocabulary information.





SEE ALSO:

Voice Implementation Guide: Enhance the Transcription with Custom Vocabulary and Vocabulary Filters (Right-click to view in a new tab or window.)

Mitigate the Log4j Security Vulnerability in an Amazon Contact Center

Upgrade your Amazon Connect contact center to version 7.2. The new version updates the KVSTranscriber Lambda log4j library to 2.17.1, which mitigates Apache log4j security issues. To address this security vulnerability, we highly recommend that you apply this update.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

Knowledge Article: Service Cloud Voice Contact Center Updates

Get the Enhanced Service Cloud Voice Experience

Get the most out of Service Cloud Voice with continued enhanced functionality and new features. Now you can keep your agents' statuses, routing queues, and phone channels in sync across Amazon Connect and Salesforce. It's easier to add a phone number to your contact center in Salesforce, and there's much more.

How:

- Keep all of your Service Cloud Voice users in sync and break down information silos with organization-wide sharing for voice calls. Now you can let agents and supervisors easily scan a list of voice calls, listen to a call recording, read the call transcript, and even edit the voice call record, regardless of ownership. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect. Learn More in Help (can be outdated or unavailable during release preview)
- Set up your phone channels in Service Cloud Voice and map your Salesforce queues to Amazon Connect queues. This functionality was already available to users with Service Cloud Voice with Amazon Connect and is now available to users with Service Cloud Voice with Partner Telephony from Amazon Connect.
- To create voice call records automatically with APIs, Service Cloud Voice with Partner Telephony now supports updating your key pairs from the Partner Telephony Contact Centers page.
- Import call data from your previous telephony provider to Service Cloud Voice with the VoiceCall object and our standard SOAP or REST APIs. This API supports bulk updates and can update audit fields whereas Telephony Integration REST API is intended for syncing production phone calls. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect.
- It's easier than ever to add a phone number to your contact center. Service Cloud Voice with Partner Telephony now supports showing you a list of available phone numbers from your partner telephony provider to pick from when you create a phone channel.
- Service Cloud Voice now supports mainland Chinese (zh-CN) for real-time transcription. Available to users with Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect. Learn More in Help (can be outdated or unavailable during release preview)
- Enhance customer interactions with Einstein Conversation Insights for Service Cloud Voice with Partner Telephony now generally available
- Speed up agent troubleshooting with downloadable call logs for Service Cloud Voice with Partner Telephony.
- As of 12/15/2021, the dialedNumber parameter in the Execute Omniflow Telephony Integration REST API call is required.
 In earlier versions, the parameter was optional. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect.
- The Telephony-Provider-Name header is required for all Telephony Integration REST API calls. Set the header to the name of the telephony provider used to integrate with Service Cloud Voice. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect.

Routing

Manage routing more efficiently with Omni Supervisor enhancements. Monitor and manage offline agents in the Agents tab. Focus supervisors on the right queues and skills in the Queues Backlog, Assigned Work, and Skills Backlog tabs.

IN THIS SECTION:

Manage All Agents from Omni Supervisor

Get updates and manage offline agents from the Omni Supervisor Agents tab. You can see agents' online and offline status durations and their assigned work capacity, plus manage their queues and skills.

Focus Supervisors' Attention on Key Queues and Skills

Customize the supervisor experience with filtered views in Omni Supervisor tabs. Set up a supervisor configuration to filter skills from the Skills Backlog tab. You can filter queues from the Queues Backlog and Assigned Work tabs. For example, to provide better support for cases from top accounts, filter the Queues Backlog tab to show only those accounts. To give your agents more privacy, you can also hide the agent timeline from supervisors.

Invoke an Omni-Channel Flow to Route Non-Real-Time Objects

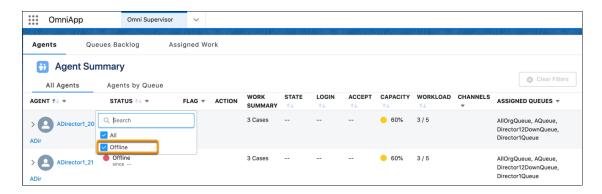
When setting up a record-triggered flow to route non-real-time work, such as cases, leads, or custom objects, call an Omni-Channel subflow to use Omni-Channel flow features. For example, to add screen pops when routing cases, call an Omni-Channel flow with screen pops from the record-triggered flow that routes cases.

Manage All Agents from Omni Supervisor

Get updates and manage offline agents from the Omni Supervisor Agents tab. You can see agents' online and offline status durations and their assigned work capacity, plus manage their queues and skills.

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

How: By default, offline, busy, and online agents appear in Omni Supervisor. To filter agents by status, use the Assigned Queues column filter, which persists across sessions. For example, to show online agents only each time you log in to Omni Supervisor, clear the **Offline** option.



SEE ALSO:

Salesforce Help: Show All Offline Agents in Omni Supervisor (Right-click to view in a new tab or window.)

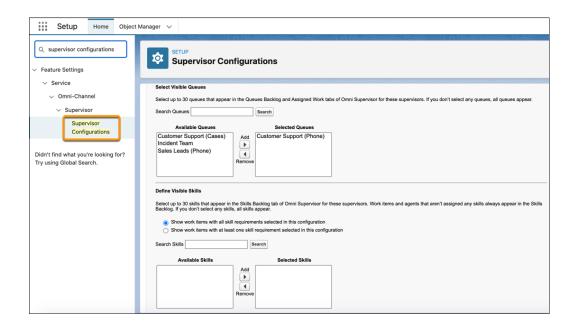
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Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, Professional, and Developer editions in Service Cloud.

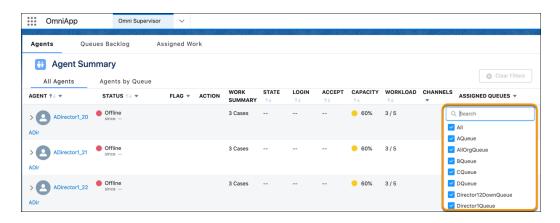
How: To add a supervisor configuration, from Setup, in the Quick Find box, enter *Supervisor Configurations*, and then select **Supervisor Configurations**.

Set up a separate supervisor configuration for each group of supervisors, specifying what agents, queues, and skills to show them in Omni Supervisor.



Note: This configuration doesn't change the supervisors' access to agents, queues, or skills. It filters what they see on the Omni Supervisor tabs.

Supervisors can also now use the Assigned Queues column filter to show specific queues.



SEE ALSO:

Salesforce Help: Create an Omni-Channel Supervisor Configuration (Right-click to view in a new tab or window.)

Invoke an Omni-Channel Flow to Route Non-Real-Time Objects

When setting up a record-triggered flow to route non-real-time work, such as cases, leads, or custom objects, call an Omni-Channel subflow to use Omni-Channel flow features. For example, to add screen pops when routing cases, call an Omni-Channel flow with screen pops from the record-triggered flow that routes cases.

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

SEE ALSO:

Salesforce Help: Invoke an Omni-Channel Flow to Route Non-Real-Time Objects (Right-click to view in a new tab or window.)

Einstein for Service

Now you can include up to 10 fields in your Article Recommendations model and calculate the segment count record for Case Classification. Einstein Bots redesigned the Bot Builder to be more user-friendly, expanded bot availability during retraining, and opened up more bot connections with the API platform.

IN THIS SECTION:

Einstein Bots

Build a bot conversation with ease in Conversation Canvas, our user-friendly redesign of the Bot Builder. With the Einstein Bots API Platform, you can create a fully functional bot and connect it to any channel, no user interface required. Keep your bot available to your customers while you retrain your intent model. The new Sales bot template lets you quickly spin up bots optimized for sales use cases.

Einstein Classification

A new way of calculating the segment count record.

Einstein Article Recommendations

Double the number of fields for predictions when you train a model.

SEE ALSO:

Einstein Release Notes

Einstein Bots

Build a bot conversation with ease in Conversation Canvas, our user-friendly redesign of the Bot Builder. With the Einstein Bots API Platform, you can create a fully functional bot and connect it to any channel, no user interface required. Keep your bot available to your customers while you retrain your intent model. The new Sales bot template lets you quickly spin up bots optimized for sales use cases.

IN THIS SECTION:

Reach More Audiences with Multiple Language Einstein Bots (Generally Available)

Build one bot to support over 17 languages. Intuitive import and export make loading translated data easy. New language-specific analytics help you optimize your bot in each language or across all languages. Enhanced intent recognition (beta) improves model performance across all bot languages.

Build Your Bot with Confidence in Conversation Canvas

Goodbye searching through menus, hello streamlined conversation design. Conversation Canvas reimagines the Bot Builder to make it easier to build and edit bots, visualize the flow of the bot conversation, and discover new and useful features.

Launch Einstein Bots Anywhere with the Einstein Bots API (Beta)

Expand your bot's reach by deploying bots with the Einstein Bots API. This feature starts and ends bot sessions, accepts bot messages, answers questions, and completes transfers on any channel.

Update Your Active NLP Bot

Add new and updated intent sets to your intent model without taking your bot out of production. Previously, you had to deactivate your bot or create a clone to rebuild your model. Now you can update a bot with a click of a button, whether it's online or offline.

Einstein Bots Analytics

Improved instrumentation helps you get the most out of your bot sessions. Use dialog goals to evaluate how well your bot is meeting your customers' needs. Visualize bot performance with new pre-built reports.

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.

Branch Out with the New Sales Bot Template

Process leads faster and in natural language by deploying the Sales Bot to your internal teams. Installation is a breeze because it's included in the main Bots Setup flow. Gather prospects, qualify their requests, and send them to your teams using High Velocity Sales cadences or tasks.

Build Trust with New Einstein Bot Certifications

Einstein Bots are now more secure with ISO and SOC2 Type 2 certifications. ISO and SOC2 compliance help Einstein Bots create a secure environment with established processes and controls built around security, availability, and confidentiality of customer data.

Reach More Audiences with Multiple Language Einstein Bots (Generally Available)

Build one bot to support over 17 languages. Intuitive import and export make loading translated data easy. New language-specific analytics help you optimize your bot in each language or across all languages. Enhanced intent recognition (beta) improves model performance across all bot 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: Enhanced intent recognition support with multiple languages 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:

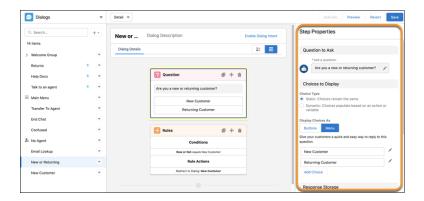
Salesforce Help: Set or Update a Bot Primary Language (Right-click to view in a new tab or window.)

Build Your Bot with Confidence in Conversation Canvas

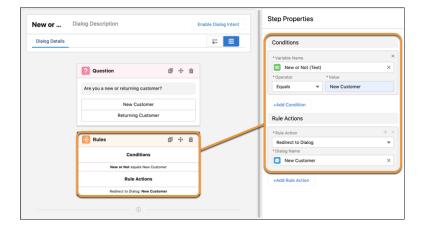
Goodbye searching through menus, hello streamlined conversation design. Conversation Canvas reimagines the Bot Builder to make it easier to build and edit bots, visualize the flow of the bot conversation, and discover new and useful features.

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.

Why: When you add a dialog step to the canvas, you see only the core conversational elements in the center of your screen. We've moved the configuration details to a separate Step Properties panel.



The dialog steps dynamically update with important information from the Step Properties panel, such as required conditions for an action or the destination of a transfer. So you can visualize what your bot does and says without previewing the bot live.



How: When you access the Bot Builder, Conversation Canvas is the default experience. But in Spring '22, you can switch between the new experience and the original menu-based builder with a click of a button.





Note: The current menu-based Bot Builder experience is scheduled to retire in Summer '22.

Launch Einstein Bots Anywhere with the Einstein Bots API (Beta)

Expand your bot's reach by deploying bots with the Einstein Bots API. This feature starts and ends bot sessions, accepts bot messages, answers questions, and completes transfers on any channel.

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Update Your Active NLP Bot

Add new and updated intent sets to your intent model without taking your bot out of production. Previously, you had to deactivate your bot or create a clone to rebuild your model. Now you can update a bot with a click of a button, whether it's online or offline.

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: Add utterances to your bot via Einstein Intent Sets. Then from the Bot Builder, access the Model Management tab and click **Build Model**. Your updated model is automatically active when the new build is complete.

SEE ALSO:

Salesforce Help: Update an Active Einstein Bot (Right-click to view in a new tab or window.)

Einstein Bots Analytics

Improved instrumentation helps you get the most out of your bot sessions. Use dialog goals to evaluate how well your bot is meeting your customers' needs. Visualize bot performance with new pre-built reports.

IN THIS SECTION:

Get More from Your Sessions with Better Instrumentation

Dig into how your customers are using your bot with the new engaged session metric and reports. An engaged session is a session where your customer sends at least one message to your bot or clicks on an option other than the End Chat button. A bot-to-bot transfer counts as a single engaged session for the initiating bot only and as a session for each bot in all sessions.

Report on Customer Success with the Generate Completed Goal Log Action

Make sure that your bot is helping your customers, not just talking to them. Use the new Generate Completed Goal Log action to identify the point in a dialog flow when a common customer goal is considered complete, such as when the bot returns a knowledge article, generates an order number, or files a case. Then generate reporting metrics to track how often that dialog is reached.

Analyze Bot Performance with New Standard Reports

We've made it easier to evaluate bot performance right out of the box with new pre-built standard reports. New reports include metrics for Article Answers feedback, escalated bot sessions, and more.

Get More from Your Sessions with Better Instrumentation

Dig into how your customers are using your bot with the new engaged session metric and reports. An engaged session is a session where your customer sends at least one message to your bot or clicks on an option other than the End Chat button. A bot-to-bot transfer counts as a single engaged session for the initiating bot only and as a session for each bot in all sessions.

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: From Reports, open the Einstein Bot Reports folder. Then run either the All & Engaged Sessions Today or All & Engaged Sessions Last 30 Days pre-built reports.



Note: All sessions includes both engaged and other sessions (for example, a session in which a customer ends the chat before interacting with the bot).

Report on Customer Success with the Generate Completed Goal Log Action

Make sure that your bot is helping your customers, not just talking to them. Use the new Generate Completed Goal Log action to identify the point in a dialog flow when a common customer goal is considered complete, such as when the bot returns a knowledge article, generates an order number, or files a case. Then generate reporting metrics to track how often that dialog is reached.

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: To add the Generate Completed Goal Log action to a dialog, select the dialog from the Bot Builder Dialogs tab. Add an action step to your dialog. Then select **Generate Completed Goal Log** from the dropdown and enter a unique name for your goal.

To report on goals completed, add the Goal Completed metric type to a standard report, and then add the Goal Name metric to view values by goal.

SEE ALSO:

Salesforce Help: Measure Bot Success with Completed Goals (Right-click to view in a new tab or window.)

Analyze Bot Performance with New Standard Reports

We've made it easier to evaluate bot performance right out of the box with new pre-built standard reports. New reports include metrics for Article Answers feedback, escalated bot sessions, and more.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Why: The following new reports are available in Reports in the Einstein Bot Reports folder:

- All & Engaged Sessions Today: Engaged sessions vs. total bot sessions by hour for today. An engaged session is a session in which a user sends at least one message or clicks at least one menu option or choice. A bot-to-bot transfer counts as a single engaged session for the initiating bot only and as a session for each bot in all sessions.
- All & Engaged Sessions Last 30 Days: Engaged sessions vs. total bot sessions by day for the last 30 days. An engaged session is a
 session in which a user sends at least one message or clicks at least one menu option or choice. A bot-to-bot transfer counts as a
 single engaged session for the initiating bot only and as a session for each bot in all sessions.
- Article Chosen Last 30 Days: The number of articles selected from articles served by Article Answers in each bot for the last 30 days.
- Article Positive Feedback Last 30 Days: A count of positive feedback received on each article selected from articles served by Article Answers in the last 30 days.
- Escalation Today: A count of escalations (any attempt to transfer) initiated by the bot or user today, and the dialogs from which an escalation was initiated. A dialog with relatively high escalations can indicate an opportunity to improve bot design or configuration.
- Escalation Last 30 Days: A count of escalations (any attempt to transfer) initiated by the bot or user by day for the last 30 days, and the dialogs from which an escalation was initiated. A dialog with relatively high escalations can indicate an opportunity to improve bot design or configuration.
- NLP Intent Called Today: A count of NLP intent calls made by each bot by hour for today.
- NLP Intent Called Last 30 Days: A count of NLP intent calls made by each bot in the last 30 days.

SEE ALSO:

Salesforce Help: Navigate Einstein Bot Standard Reports (Right-click to view in a new tab or window.)

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 Al-powered FAQ functionality as previous versions of Article Answers with enhancements based on your feedback.

Deliver longer, richer answers with expanded field support

Article Answers now supports long text area field types in your knowledge articles. Map to any long text area field to deliver a longer answer. Or download the Chat Lightning Web Component Pack from AppExchange to add rich content, like links and images, to an answer. Plus, setup for Article Answers is easier when you can map to your existing fields.

Surface a knowledge article for multiple questions

As of October 2021, 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.

Respond in more languages

Now your bot can automatically return conversational answers in Portuguese. Article Answers returns articles based on the preferred language that 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.

Troubleshoot with UI enhancements and new documentation

More detailed error messages and training warnings help you troubleshoot issues with Lightning Knowledge and language support.

SEE ALSO:

Salesforce Help: Deliver Knowledge Articles with Article Answers (Beta) (Right-click to view in a new tab or window.)

AppExchange: Chat Lightning Web Component Pack

Branch Out with the New Sales Bot Template

Process leads faster and in natural language by deploying the Sales Bot to your internal teams. Installation is a breeze because it's included in the main Bots Setup flow. Gather prospects, qualify their requests, and send them to your teams using High Velocity Sales cadences or tasks.

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 Release Notes: Capture and Add New Prospects to Sales Cadences with a Bot Template (Right-click to view in a new tab or window.)

Build Trust with New Einstein Bot Certifications

Einstein Bots are now more secure with ISO and SOC2 Type 2 certifications. ISO and SOC2 compliance help Einstein Bots create a secure environment with established processes and controls built around security, availability, and confidentiality of customer data.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

SEE ALSO:

Salesforce Help: Learn About Einstein Bots Compliance (Right-click to view in a new tab or window.)

Einstein Classification

A new way of calculating the segment count record.

Calculate the Segment Count Record with Closed Cases Only

To help determine if you meet the data criteria for training an Einstein model, the segment count record now includes closed cases only.

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

IN THIS SECTION:

View Savings at a Glance with the Einstein Case Classification Value Dashboard

Tableau for CRM customers can use the new Einstein Case Classification Value Dashboard managed package to quickly build and review reports and visualizations for classification's business value, KPIs, and exclusive analytics. The dashboard uses your case data and classification performance metrics to show the accuracy of recommendations surfaced by Einstein Case Classification. And it tracks the impact of Einstein Case Classification on Average Handle Time for your cases.

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

Who: To create and manage the Einstein Case Classification Value Dashboard, you must have Tableau CRM and Tableau CRM+ Admin permission set. To view the Einstein Case Classification Value Dashboard, you must have the Access Service Cloud Analytics Templates and Apps and Use Analytics Templated Apps permissions.

How: To get the app template, download the Einstein Case Classification Value Dashboard managed package from AppExchange. To create and customize the app, search for *Einstein Case Classification Value Dashboard* in **Analytics Studio**, and then complete the setup wizard.

Einstein Article Recommendations

Double the number of fields for predictions when you train a model.

Double the Fields with Einstein Article Recommendations

Now you can select double the number of fields for predictions when you train a model for Einstein Article Recommendations. For multiple cases or article record types with unique custom fields, all of the relevant data is readily available to build your model.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance and Unlimited editions in Service Cloud

Workforce Engagement

Meet call center staffing needs and improve scheduling with long-term forecasts, long-term capacity plans, and historical adherence metrics. Planners are more productive when they assign and update shifts in bulk, locate shifts using color, and access configuration tools in one place. A new scheduling rule limits less desirable shift assignments to keep your agents happy. And new language support benefits all Workforce Engagement admins and users in your call center.

IN THIS SECTION:

Prepare for Demand with Long-Term Forecasts

Anticipate workload volumes and adjust your staffing plans accordingly. Previously, workforce analysts could create intelligent forecasts that predicted channel volumes for up to 12 weeks. Now they can make projections for up to 52 weeks.

Tackle Staffing Requirements with Long-Term Capacity Plans

Develop call center budget and hiring plans that help your business meet customer service level agreements. Previously, workforce planners could create Omni-Channel plans and predict required shifts for up to 12 weeks. Now they can create a capacity plan that extends up to 52 weeks. They can see how many full-time employees (FTEs) are necessary by job profile and when those workers are needed.

Learn from Historical Adherence to Build Better Schedules

Discover how your teams' schedules compare with how agents actually spent their time. To improve scheduling accuracy, planners can view metrics on the historical adherence dashboard. The dashboard shows statistics for schedule adherence, conformance, Omni-Channel status, and scheduled versus presence time.

Save Time with Mass Shift Update

With just a few clicks, your planners can update shifts in bulk. They can define criteria to select a batch of shifts and assign agents, update shift statuses, or both.

Set Date Ranges with Ease on Workload Histories and Intelligent Forecasts

Define time periods more intuitively in Workforce Engagement. When an analyst creates a workload history, they specify the end date and a number of weeks. To create a forecast, they select a start date and a number of weeks. In both cases, we calculate the date range and display it.

Limit Non-Standard Shifts and Boost Agents' Work-Life Balance

Improve agent well-being with more equitable shift scheduling. Planners can create a scheduling rule that limits how many inconvenient or less desirable shifts are assigned to each agent. The scheduling logic filters out agents who have reached their individual limit.

Improve Coverage with Scheduling Across Secondary Territories

When assigning agents to shifts, Workforce Engagement scheduling considers secondary territories in addition to primary territories. Agents can have more than one secondary territory in their Service Resource records to represent other locations where they can work.

Streamline Configuration with Easy-to-Find Tools

To help your planners get started, we created a single go-to location and task menu. When planners launch the Workforce Engagement Configuration app, they can select from the tree menu on the left side of the new landing page. As we build tools to simplify configuration tasks, we'll locate them here.

Use Color to Find Shifts Fast

When your planners create shifts or shift templates, they can choose background colors to represent different shift types. For example, they can select colors to highlight various job profiles or identify service resources.

Let Your Call Center Teams Work in Their Language

We added support for multiple languages. Admins can use Setup tools in 17 languages. Analysts, planners, and agents can use Workforce Engagement in 32 languages.

Prepare for Demand with Long-Term Forecasts

Anticipate workload volumes and adjust your staffing plans accordingly. Previously, workforce analysts could create intelligent forecasts that predicted channel volumes for up to 12 weeks. Now they can make projections for up to 52 weeks.

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 view, create, edit, and delete Intelligent Forecasts.

How: When Machine Learning is selected as the forecasting algorithm, analysts can create forecasts that project up to 52 weeks. Analysts can create a single forecast per workload history.

After forecast processing is completed, analysts can see projected workloads in the dashboard. To help them spot seasonal trends, they can toggle between hourly, daily, weekly, and monthly views and apply custom date filters.

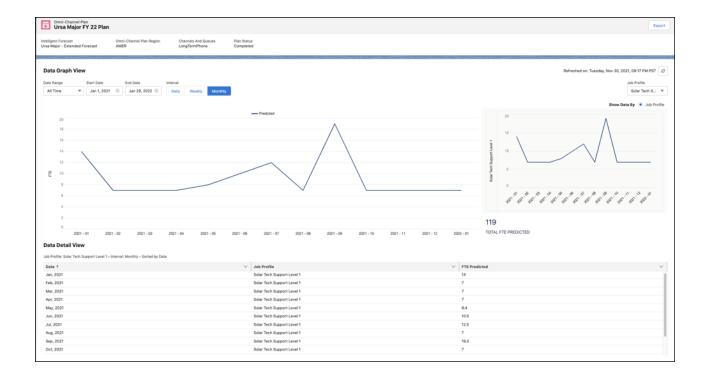
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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

Who: Users with the Workforce Engagement Analyst permission set can view, create, edit, and delete Workload Histories, Intelligent Forecasts, and Omni-Channel Plans. Users with the Workforce Engagement Planner permission set can view or create Omni-Channel plans.

How: Any forecast can be used to create either a short-term or long-term capacity plan. A long-term plan shows daily, weekly, or monthly FTE projections in the dashboard. Planners and analysts can export plan data in a CSV file.



SEE ALSO:

Salesforce Help: About Omni-Channel Plans (Right-click to view in a new tab or window.)

Learn from Historical Adherence to Build Better Schedules

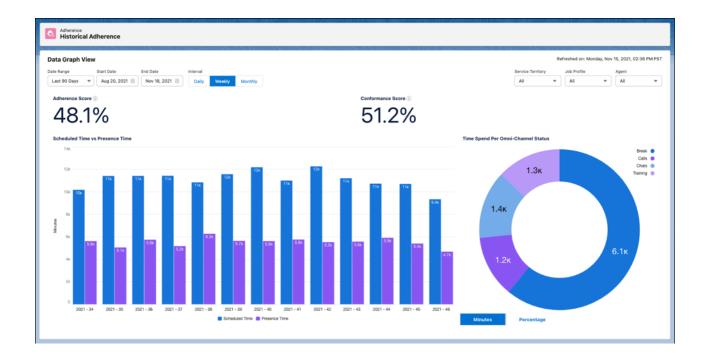
Discover how your teams' schedules compare with how agents actually spent their time. To improve scheduling accuracy, planners can view metrics on the historical adherence dashboard. The dashboard shows statistics for schedule adherence, conformance, Omni-Channel status, and scheduled versus presence time.

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 or Workforce Engagement Admin permissions can view historical adherence data.

How: In Setup, admins enable historical adherence and can restrict or allow planners to view adherence data for individual agents.

To build the dashboard, the Historical Adherence app retrieves up to 365 days of past data. Planners select parameters, such as a date range, service territories, and job profiles, to refine which metrics are displayed.



Save Time with Mass Shift Update

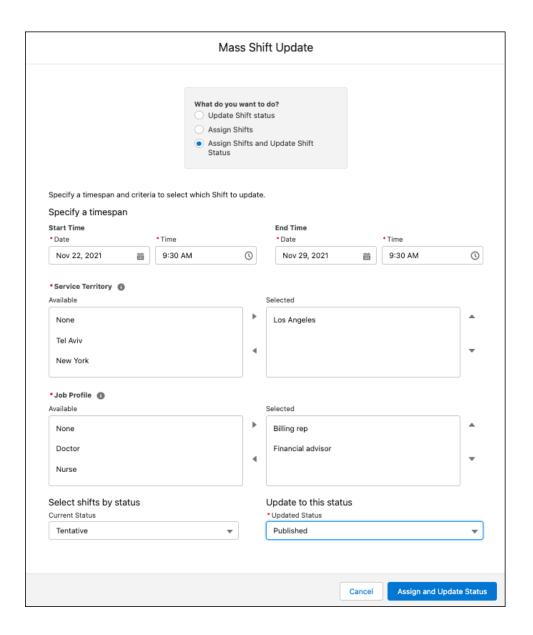
With just a few clicks, your planners can update shifts in bulk. They can define criteria to select a batch of shifts and assign agents, update shift statuses, or both.

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 and access to Shift, Service Territory, and Job Profile records can assign and update shifts in bulk.

How: From the shift schedule or table view, planners click **Mass Shift Update** and select an action. To determine which shifts to update, they can specify dates, territories, job profiles, and status settings.

Mass Shift Update lets you assign and update statuses for as many as 50,000 shifts in a single operation. For small groups of shifts, you can still select shifts in a list view and click Assign to find resources for them. Previously, you could batch assign up to 200 shifts at once. We increased this limit so that you can assign shifts for up to 3 months.

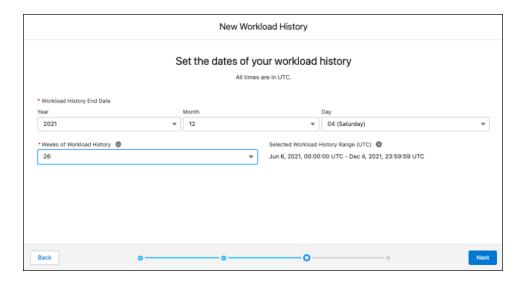


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Define time periods more intuitively in Workforce Engagement. When an analyst creates a workload history, they specify the end date and a number of weeks. To create a forecast, they select a start date and a number of weeks. In both cases, we calculate the date range and display it.

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Who: Users with the Workforce Engagement Analyst permission set can view, create, edit, and delete Workload Histories and Intelligent Forecasts.



Limit Non-Standard Shifts and Boost Agents' Work-Life Balance

Improve agent well-being with more equitable shift scheduling. Planners can create a scheduling rule that limits how many inconvenient or less desirable shifts are assigned to each agent. The scheduling logic filters out agents who have reached their individual limit.

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 or Workforce Engagement Admin permissions can create scheduling rules.

How: Planners mark less desirable shifts as Non-Standard. They specify the maximum number of these shifts in a scheduling constraint on service resources or service territories, and create a scheduling rule to limit nonstandard shifts. The scheduling logic then finds agents for those shifts who are under the predefined limit.

SEE ALSO:

Salesforce Help: Non-Standard Shifts (Right-click to view in a new tab or window.)
Salesforce Help: Create a Scheduling Rule for Workforce Engagement (Right-click to view in a new tab or window.)

Improve Coverage with Scheduling Across Secondary Territories

When assigning agents to shifts, Workforce Engagement scheduling considers secondary territories in addition to primary territories. Agents can have more than one secondary territory in their Service Resource records to represent other locations where they can work.

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Who: Users with Workforce Engagement Planner permissions can use scheduling tools.

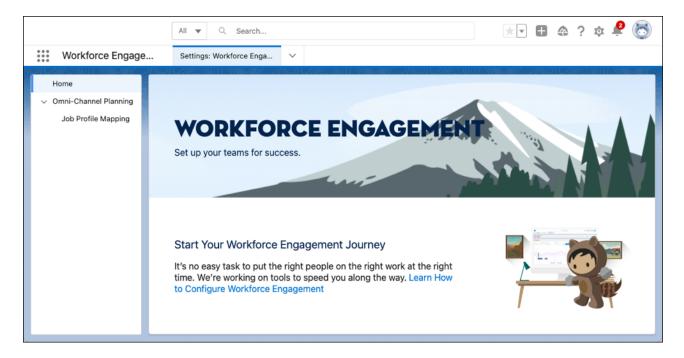
Streamline Configuration with Easy-to-Find Tools

To help your planners get started, we created a single go-to location and task menu. When planners launch the Workforce Engagement Configuration app, they can select from the tree menu on the left side of the new landing page. As we build tools to simplify configuration tasks, we'll locate them here.

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.

Why: We plan to group future tools in related areas on this tree menu. Currently under Omni-Channel Planning, planners can select **Job Profile Mapping**.



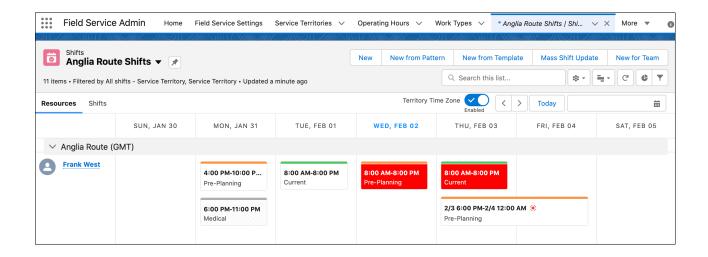
Use Color to Find Shifts Fast

When your planners create shifts or shift templates, they can choose background colors to represent different shift types. For example, they can select colors to highlight various job profiles or identify service resources.

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 create shifts or shift templates and assign colors.

How: When you create a shift or shift template, select a color to add.



Let Your Call Center Teams Work in Their Language

We added support for multiple languages. Admins can use Setup tools in 17 languages. Analysts, planners, and agents can use Workforce Engagement in 32 languages.

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 Admin, Analyst, Planner, or Agent permissions.

Why: Admins can set up Workforce Engagement in one of these languages: Simplified Chinese, Traditional Chinese, Danish, Dutch, Finnish, French, German, Italian, Japanese, Korean, Norwegian, Brazilian Portuguese, Russian, European Spanish, Mexican Spanish, Swedish, and Thai. Your analysts, planners, and agents can use Workforce Engagement in these additional languages: Bulgarian, Croatian, Czech, Greek, British English, Hungarian, Indonesian, Polish, European Portuguese, Romanian, Slovak, Slovenian, Turkish, Ukrainian, and Vietnamese.

Incident Management

When an urgent incident affects your customers, Incident Management can do the heavy lifting to eliminate potential complications before they become showstoppers. Employ out of-the-box Incident Management page layouts complete with SLA management tools to get to work right away. Assess the full impact of an incident with assets and related lists. Make sure the right eyes are on the incident as soon as it happens with incidents supported in Omni-Channel. Use work plans and work steps to quickly work toward incident resolution.

IN THIS SECTION:

Fix Incidents Faster with Integrated Paths to Resolution

When a widespread incident occurs, use Incident Management to analyze the cause, streamline agent operations, and implement changes to reduce downtime and resolve the issue. Now you can use integrated paths, such as work plans and work steps to map how to resolve an incident. Standardize your team's processes and fix time-sensitive issues quickly.

Understand an Incident's Full Impact with Related Lists

When an incident occurs, make sure that your users can see the complete picture and determine possible ripple effects. Identify the assets that are involved in an incident, problem, or change request and capture the impact level with related lists. You can also check for a parent incident and then group child incidents beneath it so that one change request can solve them all.

Simplify Incident Management Setup with Preconfigured Page Layouts

Roll out Incident Management to your users and resolve incidents faster with default Incident, Problem, and Change Request page layouts. Each layout has default Lightning components that can include a Highlights Panel, Record Detail, Details Panel, Chatter, Related Lists, Milestones, Knowledge, Actions & Recommendations, and Work Plans. Your users then can understand the incident scope, track steps to resolution, access knowledge and recommendations, and resolve the incident, all without manual configuration.

Maintain Customer Trust During an Outage with Service Level Agreements

Keep your customers in the loop and maintain Service Level Agreements (SLAs) with entitlements and milestones for incidents. Now you can set up an entitlement process for an incident to let agents know when to reach out to affected customers with updates and when violations occur.

Route Incidents to the Right Team with Omni-Channel

Take the guesswork out of assigning an incident with Omni-Channel for Incident Management. Use Omni-Channel to route an incident to an agent or queue, just like you do with cases, saving your agents time with faster resolution.

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When a widespread incident occurs, use Incident Management to analyze the cause, streamline agent operations, and implement changes to reduce downtime and resolve the issue. Now you can use integrated paths, such as work plans and work steps to map how to resolve an incident. Standardize your team's processes and fix time-sensitive issues quickly.

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

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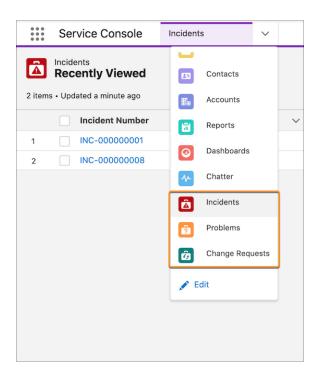
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Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, Performance, and Developer editions in Service Cloud.

Why: To make it easier to get your users up and running with Incident Management, Incidents, Problems, and Change Requests now appear on the Service Console navigation bar. And with milestones and entitlements available, agents can solve incidents like they do cases and stay on top of Service Level Agreements.

How: To start using Incident Management objects in the Service Console, click the dropdown, and select **Incident**, **Problem**, or **Change Request**.



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

How: Enable entitlements for incidents to help support agents deliver the correct service level to your customers. Set up entitlement processes to create a customized timeline that includes all the steps (milestones) that support agents must complete to resolve an incident.

Route Incidents to the Right Team with Omni-Channel

Take the guesswork out of assigning an incident with Omni-Channel for Incident Management. Use Omni-Channel to route an incident to an agent or queue, just like you do with cases, saving your agents time with faster resolution.

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

Swarming (Beta)

Swarming is just what it sounds like: Agents can come together with cross-functional experts in a tracked Slack channel to resolve cases faster than ever. Swarming with the power of Service Cloud gives agents the tools they need to involve other experts and seamlessly log collaboration, participation, and ownership. This new collaboration framework replaces a tiered support approach and helps you build trust with your customers when it matters most.

IN THIS SECTION:

Swarm on a Case to Resolve Customer Issues (Beta)

Swarming gives agents the tools they need to involve other experts and seamlessly log collaboration, participation, and ownership. Omni-Channel routes requests to experts based on their availability and skills, so your service agents can use swarming to turn a problem into a closed case—even when troubleshooting reveals that other skills are needed.

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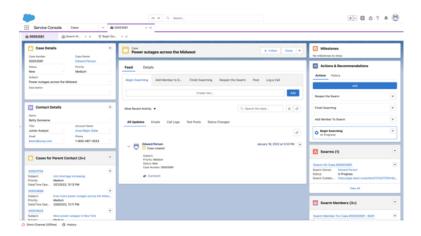
Omni-Channel routes requests to experts based on their availability and skills, so your service agents can use swarming to turn a problem into a closed case—even when troubleshooting reveals that other skills are needed.

Where: Swarming is available with Service Cloud in Lightning Experience for Professional, Enterprise, Unlimited, Performance, and Developer editions.

Why: Agents can come together with cross-functional experts in a tracked Slack channel to resolve cases faster than ever. This new collaboration framework replaces a tiered support approach and helps you build trust with your customers.

How: To get started, set up the preconfigured swarming flows and make sure Slack is enabled for your org. When you're all set up, you can go to an open Case record in a console app and start swarming.

- Create and begin a swarm with the Begin Swarming flow.
- Send a swarm request to loop in peers and get help with the Add Members to Swarm flow, harnessing the true collaborative power of your service team.
- To update the swarm status on all related records, end a swarm with the Finish Swarming flow. Then, run your reports.
- Reopen a swarm when insights reveal that a case requires further collaboration.



Service Slack App Release Notes

Tackle customer issues as a team, directly from Slack.

IN THIS SECTION:

Swarm on a Case in Slack (Beta)

Help your service team solve customer issues seamlessly, without leaving their conversations in Slack. Agents can access and update records, collaborate in a swarm channel, and manage cases.

Swarm on a Case in Slack (Beta)

Help your service team solve customer issues seamlessly, without leaving their conversations in Slack. Agents can access and update records, collaborate in a swarm channel, and manage cases.

Where: The Service Slack app is available with Service Cloud in Lightning Experience for Professional, Enterprise, Unlimited, Performance, and Developer editions.



Note: This feature is a Beta Service. Customers can opt to try such Beta Service at its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at <u>Agreements and Terms</u>.

Who: The Service Slack app is available in beta for all sandboxes. Users must have access to Slack. Slack apps, tools, and services are available in the Slack App Directory for use in the latest version of the Slack desktop, mobile, and web apps.

Why: Continue to collaborate with colleagues in Slack while accessing these important Service features.

- See and update, cases, contacts, and accounts.
- To turn a slack channel into a collaborative space to resolve a customer problem, create a swarm in it and link the new swarm to a case
- Manage the full Swarming lifecycle from Slack.
- Automatically track Swarm collaborators in Salesforce for reporting and improved Case visibility.

The beta version of this app has full multilingual support. Complete setup documentation is released as the app becomes available in production orgs. During the beta phase, all support is provided through the Service for Slack Trailblazer Community, where you can ask questions, raise support cases and provide product feedback. Join the Service for Slack Trailblazer Community now!

Knowledge

It's easier to share knowledge article links that point to the latest version. Images now open to full size to zoom in on important details.

IN THIS SECTION:

Share Knowledge Article Links that Don't Expire

Copy a knowledge article link and share it without worrying about the article version number. With the new Copy Article Link button in Knowledge layouts, you generate a link that points to the latest published version, even if you update the knowledge article after creating the link.

Click an Image for a Larger View

Images added to knowledge articles are available full size in a pop-up window. Users click any image and see more detail in an expanded view.

Get Accurate Knowledge Article View Counts

Knowledge articles now show accurate view counts. With new support for multiple Lightning components on a page without double counting views and more, you can trust that the knowledge article view counts you see are accurate.

Share Knowledge Article Links that Don't Expire

Copy a knowledge article link and share it without worrying about the article version number. With the new Copy Article Link button in Knowledge layouts, you generate a link that points to the latest published version, even if you update the knowledge article after creating the link.

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

How: After you add the Copy Article Link button to your Knowledge page layout, from a knowledge article, click Copy Article Link, and share it internally with your team. The button is available on all browsers except Safari. The article link functionality is also available through an API.

Click an Image for a Larger View

Images added to knowledge articles are available full size in a pop-up window. Users click any image and see more detail in an expanded view.

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Get Accurate Knowledge Article View Counts

Knowledge articles now show accurate view counts. With new support for multiple Lightning components on a page without double counting views and more, you can trust that the knowledge article view counts you see are accurate.

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

Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

IN THIS SECTION:

Move a WhatsApp Number to Salesforce Messaging

If you already registered a number with another WhatsApp business service provider, you can now migrate the number to Salesforce Messaging.

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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '23.

Encrypt PII Data in Social Customer Service

Honor the extra security needs that come with handling customers' personally identifiable information (PII). You can now encrypt fields on the Social Persona and Social Post objects with Shield Platform Encryption.

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.

Move a WhatsApp Number to Salesforce Messaging

If you already registered a number with another WhatsApp business service provider, you can now migrate the number to Salesforce Messaging.

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

Why: By migrating your number, you keep your quality rating, display name, messaging limits, Official Business Account status, and any previously approved "High" quality message templates, while gaining access to Salesforce Messaging features. Previously, it wasn't possible to migrate a registered number from one WhatsApp Business Account to another.

How: When you file a case with Salesforce to create a WhatsApp channel in Messaging, note whether the number is already registered with a WhatsApp Business Account for another business service provider. When Salesforce's WhatsApp Enablement Team creates your WhatsApp channel, they'll instruct you to ask your current provider to turn off two-step verification. If two-step verification remains on, your number can't be migrated. Otherwise, the steps for setting up a WhatsApp channel in Messaging remain the same.

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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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '23.

When: This update is postponed to Spring '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 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 aren't customizable, 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:

Salesforce Help: Set Up a Default No-Reply Email Address Release Updates

Encrypt PII Data in Social Customer Service

Honor the extra security needs that come with handling customers' personally identifiable information (PII). You can now encrypt fields on the Social Persona and Social Post objects with Shield Platform Encryption.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions and have Social Customer Service enabled and connected to a Marketing Cloud Social service.

Why: You can now encrypt these Social Customer Service fields.

- Social Persona—Bio, Profile URL, Provider External Picture URL, Real Name
- Social Post—Attachment URL, Headline, Message, Post URL, Social Handle

Most fields support probabilistic and deterministic encryption schemes.

SEE ALSO:

Encrypt Social Persona and Social Post Fields

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.

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

When: This update was first available in Winter '21 and is enforced 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 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 getCaseIdFromEmailThreadId wherever it occurs in your org's custom code.

SEE ALSO:

Salesforce Help: Email-to-Case Threading Release Updates

Salesforce for Slack

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

See the Salesforce for Slack release notes for the latest updates: Salesforce for Slack Release Notes. (Right-click to view in a new tab or window.)

Safety Cloud

In today's uncertain health environment, vaccines and testing are critical for getting people together more safely. Also critical for organizations are secure, personalized, and timely communications about in-person gatherings that help build trust between them, their personnel, and their consumers. With Safety Cloud, organizations can create safer and more trusted events and return-to-work experiences.

See the Salesforce release notes for the latest updates: Salesforce Release Notes.

IN THIS SECTION:

Deliver Safer In-Person Experiences for Event Staff and Attendees with Safety Cloud

Collect, verify, and manage COVID-19 health status for event attendees in a secure, personalized, and timely manner. Associate the event registration process with your attendee's COVID-19 health status, and generate a secure multi-factor credential for the event. Communicate directly with attendees about changes to admission protocols or possible exposure to COVID-19. Track key metrics relating to the progress of COVID-19 testing verifications and health status for event registrants.

Generate QR Codes Automatically for Health Verifications

Now it's easier to generate QR Codes that provide access to in-person events. Using rule-based logic, you set the criteria for QR Code generation. Then Safety Cloud generates a QR code automatically and it's applied to the Health Verification record.

Deliver Safer In-Person Experiences for Event Staff and Attendees with Safety Cloud

Collect, verify, and manage COVID-19 health status for event attendees in a secure, personalized, and timely manner. Associate the event registration process with your attendee's COVID-19 health status, and generate a secure multi-factor credential for the event. Communicate directly with attendees about changes to admission protocols or possible exposure to COVID-19. Track key metrics relating to the progress of COVID-19 testing verifications and health status for event registrants.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Safety Cloud is enabled. Setup for Safety Cloud is available only in Lightning Experience.

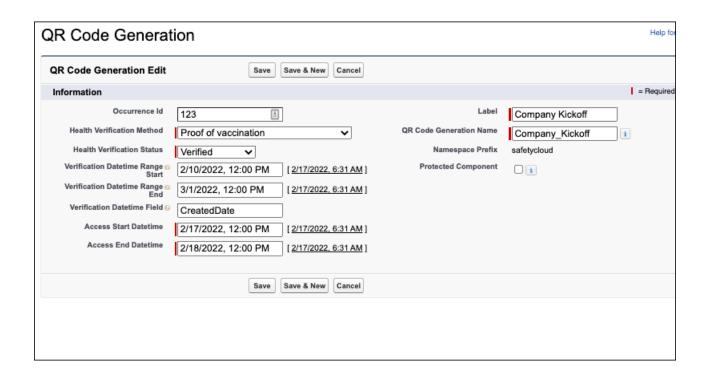
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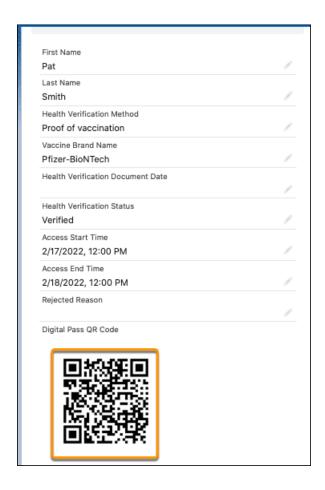
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Safety Cloud is enabled. Setup for Safety Cloud is available only in Lightning Experience.

How: The QR Code Generation feature is enabled by default when you install Safety Cloud. To fully implement the feature, specify the criteria that triggers automated QR Code Generation.

You can configure a QR Code Generation Custom Metadata Type with rules to generate QR codes and their access values.



When a Health Verification meets the criteria defined in the QR Code Generation Custom Metadata Type record, Safety Cloud generates the QR code for the Health Verification record.



SEE ALSO:

QR Code Generation

Health Verification

Optimize how you manage Health Verification records by assigning them to the user's Person Account. Reduce the likelihood of user error by launching Health Verification forms with customer data pre-filled. Attend to problematic health verifications efficiently with a special queuing option. Use custom metadata types to improve how you manage Health Verification FAQ content and Health Verification notifications.

See the Health Verification release notes for the latest updates.

IN THIS SECTION:

Optimize Health Verification Records Management with Person Accounts

Person Accounts give administrators a centralized location where they can view and manage all health verification records.

Complete Health Verifications Quickly and Easily

Now you can parameterize the Health Verification form URL with data from external systems. With a parameterized URL, when a user clicks the Health Verification link, the form launches with the customer's data pre-filled to save time and improve accuracy.

Route Health Verifications to the Needs Review Queue

Now you can route health verifications that require special attention to a Needs Review Queue. The Needs Review Queue makes it easier to manage the health verification records that need special attention.

Customize Health Verification Notifications

Now you can adjust the Marketing Cloud send definition mappings to define and map which email notifications to send to users after their health verification status changes. After the user's Health Verification record is verified, the system triggers a specific Marketing Cloud send definition, informing the user on the status of their request.

Create FAQ Content More Easily with Custom Metadata Types

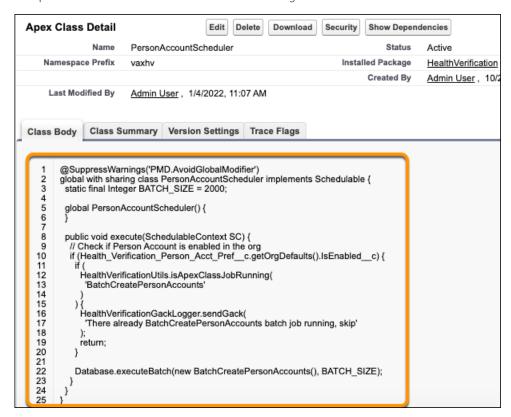
With the FAQ Custom Metadata Type, you can create FAQ content without having to edit code.

Optimize Health Verification Records Management with Person Accounts

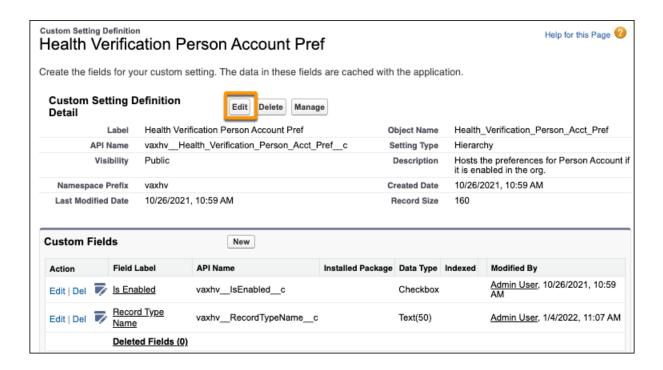
Person Accounts give administrators a centralized location where they can view and manage all health verification records.

Where: This change applies to Vaccine Cloud in Developer, Enterprise, and Unlimited editions.

How: When a user submits a health verification, you can schedule a job to create a Person Account for them automatically. Then use the Apex Class PersonAccountScheduler to assign all their Health Verification records to it.



To expand the way you now use Person Accounts, you can create a record type or health verifications on the Person Account object.



SEE ALSO:

Enable Person Accounts

Create a Health Verification Record Type on the Person Account Object

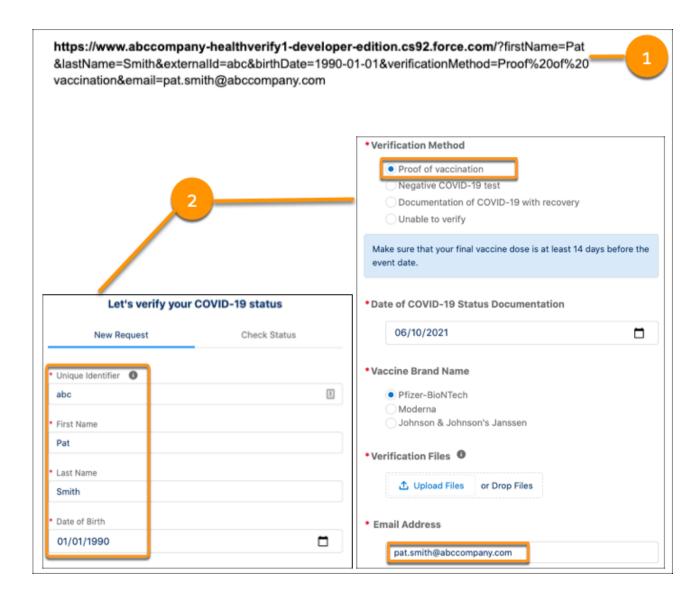
Create a Health Verification Record Type on the Person Account Object

Complete Health Verifications Quickly and Easily

Now you can parameterize the Health Verification form URL with data from external systems. With a parameterized URL, when a user clicks the Health Verification link, the form launches with the customer's data pre-filled to save time and improve accuracy.

Where: This change applies to Vaccine Cloud in Developer, Enterprise, and Unlimited editions.

How: Retrieve relevant user data from external systems programmatically. Append retrieved data as encoded parameters to the Health Verification form URL. (1) When a user clicks the health verification from URL, data from the parametrized URL prefills the form pages. (2)



SEE ALSO:

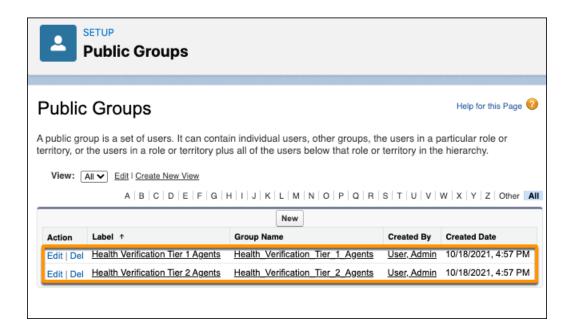
Customize the Health Verification Pages

Route Health Verifications to the Needs Review Queue

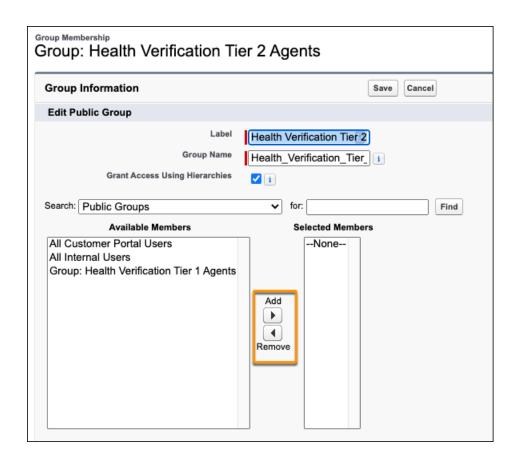
Now you can route health verifications that require special attention to a Needs Review Queue. The Needs Review Queue makes it easier to manage the health verification records that need special attention.

Where: This change applies to Vaccine Cloud in Developer, Enterprise, and Unlimited editions.

How: After you install the Health Verification package, create two public groups for Agents, a Health Verification Tier 1 group and Health Verification Tier 2 group.

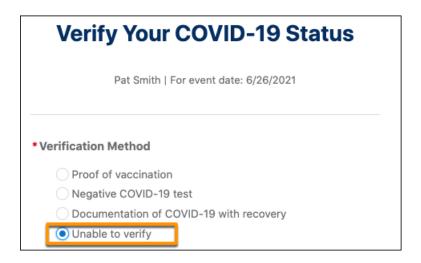


Assign Tier 1 and Tier 2 groups to the Health Verification queue, and assign the Tier 2 group to the Needs Review queue as well. When an Admin assigns an agent to the Tier 2 Group, that agent gets access to the Needs Review queue.

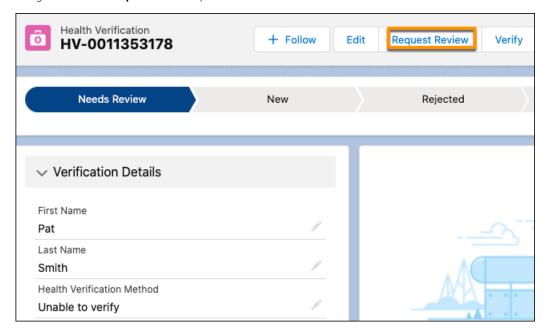


Health Verification records get routed to the Needs Review Queue automatically when:

• A user clicks the **Unable to Verify** button when filling out the Health Verification Method field.



An agent clicks the Request Review quick action from a user's Health Verification record.



SEE ALSO:

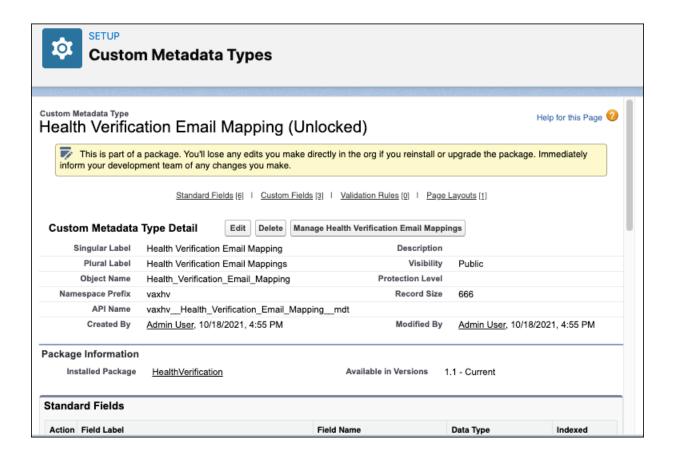
Health Verification Post-Installation Procedures

Customize Health Verification Notifications

Now you can adjust the Marketing Cloud send definition mappings to define and map which email notifications to send to users after their health verification status changes. After the user's Health Verification record is verified, the system triggers a specific Marketing Cloud send definition, informing the user on the status of their request.

Where: This change applies to Vaccine Cloud in Developer, Enterprise, and Unlimited editions.

How: From Setup, configure the Health Verification Email Custom Metadata Type and the Health Verification Email Mappings.



When the generated Health Verification record matches the configuration criteria specified for the Custom Metadata Type, the Marketing Cloud Event Definition generates and sends an email to the user. The email informs the user about the status of their health verification request. For example, the email can indicate that the user's request is accepted, rejected, or still being reviewed.

SEE ALSO:

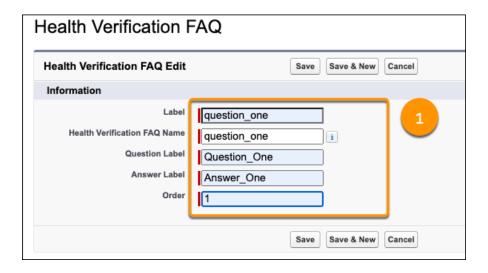
Define the Send Definitions Configured in Marketing Cloud

Create FAQ Content More Easily with Custom Metadata Types

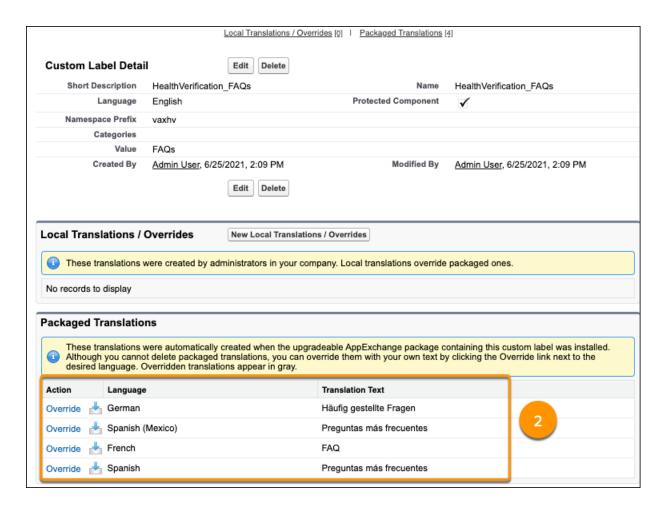
With the FAQ Custom Metadata Type, you can create FAQ content without having to edit code.

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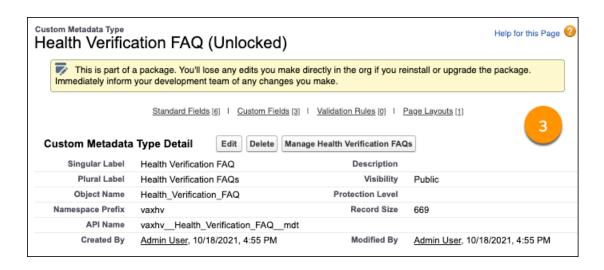
How: Manage your FAQ content with Custom Metadata Types.



Create each FAQ question and associated answers with Custom Labels (1).



Set the language for the Custom Labels (2)



Create the Custom Metadata Type for the FAQ to reference the Custom Labels (3)

SEE ALSO:

Customize the Health Verification Pages

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

From free, easy-to-use resources to services engagements—and a whole lot in between—Salesforce Customer Success has a path to success for everyone, at every stage of the journey. With each release, we introduce new and better ways to help you see results from all of your Salesforce products, faster. Highlights for Spring '22 include:

- Success Center enhancements
- Salesforce Help enhancements
- Slack collaboration for Signature Success Plan
- Signature Success Plan enhancements for Salesforce Industries and B2B Commerce
- Expert coaching enhancements for Premier Success Plan

Experience the enhancements for yourself by visiting the Success Center at successcenter.salesforce.com and Salesforce Help at help.salesforce.com. Get to know Success Plans by visiting our overview page or taking the Salesforce Success Plans Trailhead module. To learn more about how you can take advantage of the full Success Ecosystem to achieve your goals, check out our new guide, Welcome to the World of Success from Anywhere.

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. 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 supports 8 different languages, now including Simplified Chinese and Korean.

Trailhead GO is available on iPhone, iPad, and Android devices.

- Android: Trailhead GO at Google Play
- iOS: Trailhead GO at the App Store

Spotlight on Content

We added new Field Service and Salesforce Maps resources.

IN THIS SECTION:

Salesforce Maps Developer Guide

Fine-tune your Salesforce Maps implementation using Apex. For example, return estimated travel distances and times between locations, get geographical coordinates for addresses, and retrieve geometric data for areas and perimeters.

Implement Salesforce Maps Territory Planning

Prepare sales and service operations for designing territories that promote fair distributions of work, eliminate gaps in coverage, and improve customer experiences with your company.

Prepare Supplemental Data from Other Sources for Planning Territories

Get sales and service territories dialed in with supplemental data from outside sources. For example, import account attributes from your company when you create datasets or add market data from a third party to any alignments in Salesforce Maps Territory Planning.

Keep Field Reps Safe During Customer Visits

Minimize the risk of exposure to COVID-19 between your reps and their customers. Automate an approval process for in-person visits and prompt your reps to comply with your company's safety guidelines.

Chart a Successful Journey with the Field Service Learning Map

Get Field Service set up and discover new possibilities with curated resources from Salesforce experts. The learning map is for admins, customers, partners, or anyone who wants to learn more and do more with Field Service.

Watch Videos (English Only)

We created instructional videos to help your users learn about new and improved Field Service features.

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SEE ALSO:

Salesforce Help: Prepare Supplemental Data from Other Sources

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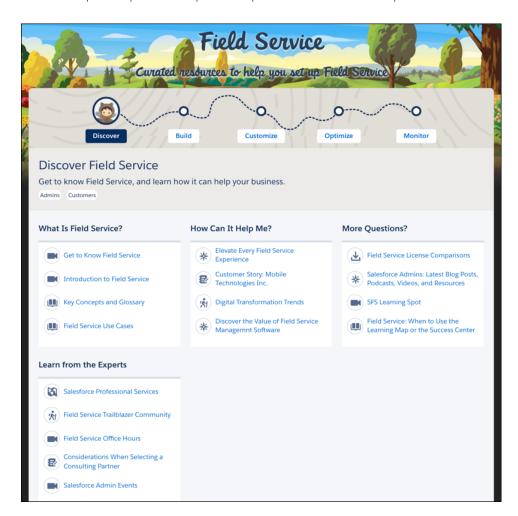
Where: Bookmark the Field Service learning map (English only) to return to it again.

How: The map directs you to resources for five key steps in the Field Service journey.

- 1. Discover Field Service and learn how it can help you.
- 2. Build Field Service with steps that consider setup dependencies.

- **3.** Customize Field Service to meet the needs of your team.
- 4. Optimize your schedule to save time and money.
- **5.** Monitor and troubleshoot Field Service issues.

Click each step on the path at the top of the map to see resources for that step.



Watch Videos (English Only)

We created instructional videos to help your users learn about new and improved Field Service features.

- The new Offline Briefcase Related Record Priming video shows how to choose only the relevant records you need before going offline.
- The new Appointment Bundling video shows how grouping short appointments at nearby or same-site locations to create a bundle helps you and your customers.
- The new Shift Enhancements video shows the latest enhancements for shifts, such as how to color code shifts and balance nonstandard shifts across the team, how to find service resources based on predefined rules and objectives and quickly update the assignee or status for multiple shifts.

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 so that you can 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 then select Release Updates.

Enforced with This Release

These updates are scheduled to be enforced this release.

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 and is enforced in Spring '22.

Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)

This release update enforces the documented behavior of bypassing MFA challenges for users who are assigned the user permission Multi-factor Authentication for User Interface Logins. This update was first made available in Winter '22 and is enforced in Spring '22

Disable Users from Logging Into an Org or Experience Cloud Site with Login Credentials as URL Query String Parameters (Release Update)

To improve security, users can no longer log in to Salesforce by using a username and password as URL query string parameters to the login URL. Any users who try to do so are redirected to the login page. This update was first made available in Winter '22 and is enforced in Spring '22.

Enable Visualforce Expression Language Apex Method Access Modifier Enforcement (Release Update)

Previously, the Visualforce Expression Language incorrectly validated the access modifiers of Apex methods defined by custom controllers. Developers could sometimes access unauthorized data on managed and system classes. To improve security, this update validates the access modifier for each method and throws an error if the Visualforce Expression Language can't invoke the method. This update was first made available in Winter '22 and is enforced in Spring '22.

Enforce CORS Allowlist for Lightning Apps (Release Update)

The CORS allowlist in Setup isn't currently enforced for Lightning apps on the server, although 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 and is enforced in Spring '22.

Get Ready for Browser Performance Improvements for Salesforce CPQ (Release Update)

This update allows Salesforce CPQ to run faster in supported web browsers by employing new Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Spring '22.

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

With this update, we secure access to subscriber orgs by requiring multi-factor authentication (MFA) when logging into the License Management Org (LMO). MFA is required only for LMO users who require access to the Subscriber Support Console. This update was first made available in Spring '21 and is enforced in Spring '22.

Securely Update Email Addresses and Reset Passwords (Release Update)

To ensure the security of your org, users must now reset their password before your changes to their email address and password become active. When a user resets the password using the provided link, the new email address is activated. Previously, the user's email address became active as soon as you saved the change. This update was first made available in Summer '21 and is enforced in Spring '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.

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. Note that while sharing is supported for guest users, it's not supported for internal or external users. This update was first made available in Winter '22 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Summer '22. The Spring '22 enforcement date shown in the UI is incorrect.

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.

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.

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 Winter '23, in new orgs only, the update sets 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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Winter '23. The Spring '22 enforcement date shown in the UI is incorrect.

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.

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.

Enable Stronger Protection for Your Users' Personal Information (Release Update)

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users from accessing other users' personal information. This feature, which replaces the Hide Personal Information setting, secures more personal identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This update was first available in Spring '22.

Prevent Consecutive API Navigation Calls (Release Update)

In Visualforce pages and Lightning components, API navigation calls can be fired consecutively, which can lead to unwanted behavior due to competing API calls. This release update prevents this API navigation call pattern and fires only the first navigation call. When this release update was first made available, it applied only to Visualforce pages. It now also applies to Lightning components. 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 Winter '23.

Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users (Release Update)

To improve the security of your data, Salesforce is removing permission set licenses that contain View All, Modify All, edit, and delete object permissions and their associated permission sets from guest users. The only object permissions allowed for guest users are read and create. Going forward, you can no longer assign guest users permission sets that are associated with these permission set licenses and contain the restricted permissions. This update was first made available in Spring '22.

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.

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 Summer '22, but we postponed the enforcement date to Spring '23.

Enable ICU Locale Formats (Release Update)

To conduct 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.

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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '23.

Run Flows in User Context via REST API (Release Update)

With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow. This update was first made available in Spring '22.

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.

Scheduled to Be Enforced in Spring '24

These updates are scheduled to be enforced in Spring '24. The list can include new, previously announced, and previously postponed release updates.

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 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '24.

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.

Securely Call the Visualforce Remoting API (Release Update)

This release update is canceled. The release update isn't going to be enforced in its present form.

Enjoy Enhanced Folder Sharing

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. All orgs are now updated to enhanced folder sharing. Legacy folder sharing is no longer available.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.