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# Salesforce Release Notes

Salesforce, Summer '22

Build lifelong customer relationships and exceed your business goals





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# SALESFORCE SUMMER '22 RELEASE NOTES

Exceed your business goals with the Summer '22 release by seamlessly integrating your data, finding meaningful insights, and building lifelong customer relationships.

## IN THIS SECTION:

### [How to Use the Release Notes](#)

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

### [Get Ready for the Release](#)

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

### [How and When Do Features Become Available?](#)

Some features in Summer '22 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

### [Supported Browsers](#)

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

### [Salesforce Overall](#)

Update primary billing contact information directly in the Your Account app. With matrix questions in Salesforce Feedback Management, create shorter surveys and help participants complete surveys faster. In Salesforce Scheduler, share service resource availability using Appointment Invitation URL and check out two new flows. Explore many enhancements to Search and much more in Summer '22.

### [Analytics](#)

Sync data with improved connectors, get more customer insights with the Opportunity embedded dashboard, and make better business decisions when you use trending data to fine-tune predictions.

### [Commerce](#)

Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2C Commerce, Commerce Einstein, Omnichannel Inventory, and Salesforce Order Management.

### [Customization](#)

Make your org more secure thanks to updated restriction rules and permissions. Improve system performance and health with enhancements to the way picklist management and values are handled. Get better address data accuracy and improve user experience with Custom Address Fields (beta).

### [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

Get insights from unstructured text with Einstein Discovery Text Clustering. Einstein Prediction Builder is easier to use with a new guided flow and automatic data-checking as you build. Plus, Einstein Reply Recommendations can identify common replies in 16 languages, helping your agents provide consistent messaging to your global customer base. Read on to discover even more productivity-boosting Salesforce Einstein features.

### Experience Cloud

Customers with Experience Cloud licenses can reap the benefits of full access to all the features included in Salesforce CMS. On LWR sites, you can build flows across all templates and add links to button and form components or any layout component that can be made into a link. Enhancements to Mobile Publisher for Experience Cloud apps make app navigation easier.

### Field Service

Enhanced Scheduling and Optimization helps you get your schedule in top shape with improved scheduling and travel time predictions, and the flexibility to select which territories use Enhanced Optimization. Troubleshoot work order generation issues with new status messages that help you take the next steps. Customers can stay COVID-safe by using their own devices to sign service reports. The Field Service mobile app keeps work running smoothly with automatic status changes, limited location tracking, and an all-in-one view of appointments, work orders, and absences for mobile workers.

### 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 our public cloud partners allows us to expand quickly and also helps us meet local data storage requirements. Hyperforce allows us to grow using common tools, deployment patterns, security practices, and more.

### Industries

Get started faster with Guided Setup support in several Industries clouds. Track your carbon footprint with Net Zero Cloud. Manufacturing Cloud helps leverage customer forecasts into business opportunities for you. Nurture relationships and run branches better with Financial Services Cloud. Health Cloud empowers care providers to support patients more closely and helps patients do more for themselves, while Loyalty Management brings you closer to your program partners and members with enhanced transaction journals and filters. Public Sector Cloud brings enhanced support for inspections, investigations, and health care plans.

### 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

Forecast types are grouped by user role, including quantity measures, schedule dates, and product dates. Mobile Publisher updates include Enhanced Mobile App Security (pilot), default bottom tab bar navigation visibility, and new navigation features. In Briefcase Builder, related record priming is generally available, higher record limits offer increased flexibility, and new filters were added.

### Pardot

You can now apply completion actions to subsets of prospects with conditional logic. You also get sharable campaigns in Lightning, email bounce reports, and improvements to enhanced landing pages. Plus, get real-time prospect updates in Slack with the new Account Engagement app for Slack.

### Quip

Get the most out of your Salesforce data with Quip. Use multi-factor authentication to protect your Quip data. Simplify Quip user account and API key management with new Quip API methods. Get faster performance with enhanced, more lightweight Quip API methods. Use new fields in Quip objects to gather more accurate Quip user engagement metrics.

### Revenue

Use Subscription Management to sell subscriptions and drive more revenue. Enable a release update in Salesforce CPQ, and use Salesforce CPQ Plus to track asset lifecycles. Review a change in Salesforce Billing.

### Sales

Use new Sales Enablement features to improve your company's training and enablement experience. Unlimited and Performance Edition orgs can access several Sales Cloud features without purchasing add-on licenses. You can enable person accounts without reaching out to Salesforce Support. We're also rolling out lots of new features for Collaborative Forecasts, Salesforce Maps, Einstein Conversation Insights, and other Sales Cloud features.

### Salesforce CDP (Customer Data Platform)

Customer Data Platform, formerly Salesforce CDP, helps you connect and unify customer data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Activate loyalty, transaction, engagement attributes, and more from Customer Data Platform. Marketers can send additional customer profile information to marketing platforms, like Marketing Cloud Engagement, to enhance personalized communications. As a developer, you can use the CDP Python connector to leverage the power of Query API to extract data from Customer Data Platform into your environment.

### Salesforce Flow

Salesforce is continuing its investment in Flow by launching new capabilities that make it easier to get work done, while seamlessly delivering experiences that engage customers. With that in mind, Einstein Automate is now Salesforce Flow. Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration. Build and deliver personalized recommendations with Einstein Next Best Action.

### Salesforce for Slack Integrations

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.

### Security, Identity, and Privacy

Enhanced domains now work with sandboxes, offer redirects, and lend more secure login options. You can now log in with your Microsoft credentials, access and maintain consumer keys and consumer secrets more securely, and streamline your transition to using multi-factor authentication. Gather preference information consistently with reusable templates in Privacy Center. Salesforce Shield offers encryption and event tracking for more data and control over Transaction Security metering behavior. Use Security Center to create security-centric reports, and define security policies for all connected tenants (generally available). Private Connect support for AWS integrations is available in the EMEA and APAC regions. And remember to prepare inbound and outbound connections for the Private Connect network upgrade.

### Service

Take advantage of new Service Cloud features that help you and your team deliver smart, swift service. Give customers a personalized experience on your mobile app or website with Messaging for In-App and Web (generally available). Monitor disruptions in more places with third-party integrations for Incident Management. Break down team silos and speed up time to resolution with swarming on incidents, problems, and change requests in Slack. Voice call transfer enhancements and agent flags and whispers provide control and flexibility. Get Einstein Reply Recommendations in up to 16 languages, and add Einstein Article Recommendations and Case Classification to existing flows. And in Workforce Engagement, the new Intraday Management dashboard helps supervisors identify and resolve unexpected staffing gaps and schedule adherence discrepancies.

### [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.

### [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

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

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



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

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

### IN THIS SECTION:

#### [Use Filters to Zero In on the News That Matters Most](#)

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

#### [Know What's in Salesforce Lightning Experience and What's in Salesforce Classic](#)

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

#### [Release Note Changes](#)

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

#### [Your Feedback Matters](#)

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

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

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

### **Experience**

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

**Edition**

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

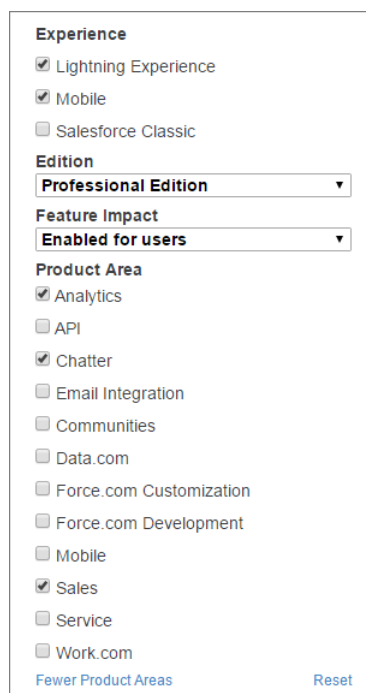
**Feature Impact**

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

**Product Area**

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

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



The screenshot shows a filter sidebar with the following sections:

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

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

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

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

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

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

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

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

## Release Note Changes

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

### August 22, 2022

#### Minimize Disruptions with Improved Presence Status Syncing for Voice Calls

Updated the list of telephony models that support the presence status syncing feature.

### August 8, 2022

#### Loyalty Management for Commerce

Added release notes to announce the capability to cancel orders and items and the capability to use Loyalty Management for Commerce without Salesforce Order Management.

#### AI Accelerator

Added release notes to announce the availability of AI Accelerator.

#### Form Security Features Now Mandatory

Added release notes to announce a security update that takes effect August 12, 2022.

### August 1, 2022

#### Metadata API

Added a release note to announce the new `sendNotification` values in the existing `actionType` field on the Flow metadata type.

#### Allow Redirects Only to Trusted External URLs

Updated the release note to indicate that this feature is only available in Salesforce Classic.

#### Invocable Actions

Added a release note to announce the new `sendNotification` actions.

#### Manage Associations Between Automatically Captured Emails and Related Records

Updated the Where section to indicate that this feature is only available in Professional, Enterprise, Performance, and Unlimited editions.

#### Manage Automatically Associated Records from the Email Dropdown in the Activity Timeline

Updated the Where section to indicate that this feature is only available in Professional, Enterprise, Performance, and Unlimited editions.

#### Enable New Order Save Behavior (Release Update)

Updated the enforcement date from Spring '23 to Summer '23.

### July 25, 2022

#### Make Sure Agents Don't Miss Incoming Messages with an Orange Tab on page 635

Agents see an orange tab in the Messaging Session record when an incoming message is received.

## July 25, 2022

### **HTML Tags in Chatter Feeds Are Changing**

Added changes to supported tags in Chatter feeds.

### **Stay Connected with Custom Notifications on Slack**

Added a release note to announce custom notifications on Slack.

### **Lightning Components**

Added changes to the Lightning Components introduction.

### **The B2C Commerce Integration Automatically Creates Web Stores as Needed**

Added a release note to announce that the Order Management integration with B2C Commerce now automatically creates web stores as needed.

### **Search by SKU in B2B Stores**

Added a release note to announce SKU search for B2B Commerce.

### **Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License**

Clarified that Account Insights, Opportunity Insights, and Sales Analytics aren't included with Sales Cloud Einstein in the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions.

## July 19, 2022

### **Intelligent Document Reader on page 453**

Added release notes to announce the availability of Intelligent Document Reader.

### **Sentiment Insights on page 465**

Added release notes to announce the availability of Sentiment Insights.

## July 18, 2022

### **Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs**

Corrected the location of the My Domain setting and clarified that the setting is only effective if you set it before the org gets Winter '23. Clarified that enforcement is automatically postponed in scratch orgs.

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

Added changes to supported tags in `lightning-formatted-rich-text` and `lightning:formattedRichText`. Clarified that the changes to `lightning-input-rich-text` and `lightning:inputRichText` affect supported tags.

### **Change in Permissions for the Account Object**

Added a release note to announce change in Account object permissions for Customer Community license.

### **Identity Verification for Manufacturing Cloud**

Added information about using Identity Verification in Manufacturing Cloud.

## July 15, 2022

### **Objects in the Clinical Data Model have Updated Sharing Options**

Added a new release note.

## July 11, 2022

### Tooling API New and Changed Objects

Updated the release note to include a new field addition to the EntityDefinition object.

### Manage Your Permission Assignments with the User Access and Permissions Assistant

Added a release note for the User Access and Permissions Assistant app.

### Develop Event-Driven Apps with Pub/Sub API (Generally Available)

Added a link to the new Pub/Sub API documentation.

### Metadata API

Added a release note about the new emailTemplates field on the ContentAssetRelationships metadata type.

### Launch Explorations for Customer Data Platform with a Single Click

Added a release note about the new Explore in Analytics option for Customer Data Platform records.

### Metadata API

Added a release note for fields on the AuthProvider metadata type that were added to the *Metadata API Developer Guide*.

## July 4, 2022

### Allow Members to Add More Products and View their Activity History

Added a release note to announce the availability of Loyalty Management for Commerce in Summer '22.

### Allow Redirects Only to Trusted External URLs

Added a release note to announce a new option for handling redirections to external URLs.

### Salesforce CDP (Customer Data Platform)

Removed a release note about data transforms used for prepping data during ingestion.

### Salesforce CDP (Customer Data Platform)

Removed a release note about key qualifiers in Customer Data Platform.

### Salesforce CDP (Customer Data Platform)

Removed a release note about key qualifiers in Calculated Insights.

### New and Changed Objects

Added a release note about the MacroUsage object.

### Salesforce CDP (Customer Data Platform)

Updated a release note about the attribute library in Segmentation by adding content and a screenshot on how to use it.

### Achieve Net Zero Faster Using Data Driven Insights

Added a release note to announce the availability of the Net Zero Cloud What-If Tableau Accelerator.

### Metadata API

Added a release note to announce the new enableTimelineCompDateSort field on the ActivitiesSettings metadata type.

### Pardot API: New and Changed Items

Corrected the release note to indicate that fields were added to objects only in API versions 3 and 4.

### Delete Obsolete Shares Asynchronously

Added a release note about deletion of obsolete shares.

### Achieve Greater Query Accuracy with Null Handling for Dimensions (Generally Available)

Added a release note to announce null handling in SAQL is generally available.

### Summary Functions Now Include Median

Updated availability to "enabled for users".



**New and Changed Objects**

Added information about the ServiceReport and ServiceReportLayout objects.

**Receive Change Event Notifications for More Objects**

Added change events for ServiceReport and ServiceReportLayout objects.

**See Related Sales Cadences in Task Reports**

Added note clarifying that emails sent by Einstein Activity Capture users don't appear in task reports.

**Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)**

Clarified the reason why the previous CPU time consumed was occasionally incorrect.

**Develop from Anywhere Using Salesforce Code Builder (Beta)**

The Code Builder beta launch begins after July 13, 2022.

**Metadata API**

Added a release note to announce a new field for enabling service case insights in Pipeline Inspection.

**Restore Data Using Date Ranges**

Added a release note about version 1.120 of the Backup and Restore managed package.

**View Object Hierarchies and Record Details Using Relationship Graphs**

Added a release note to announce the new RelationshipGraphDefinition metadata type for Financial Services Cloud.

**Updates to Developer Edition Org Expiration Policy**

Added a release note to announce changes to the developer edition org expiration policy.

**Create and Share Your Own Bot Templates (Beta)**

Removed statement about template support for standard bots only. Templates are supported for standard and enhanced bots.

**Control Access to External Object Records with Restriction Rules**

Added a list of supported Salesforce Connect adapters.

## June 24, 2022

**Load Large Datatables Faster with Virtual Rendering**

Removed this release note and any mentions of the feature in related release notes. Datatable virtual rendering is not available for Summer '22.

## June 20, 2022

**Upgrade Your Conversational Experiences with Enhanced Bots (Generally Available)**

Added clarification that the Messaging for In-App and Web SKU is required only when using Enhanced Bots on Messaging for In-App and Web channels.

**View Savings at a Glance with the Einstein Bots Value Dashboard**

Added note announcing planned retirement of the Einstein Chatbot Analytics v2 Dashboard in Winter '23.

**New and Changed Objects**

Added release notes to announce new fields on the Asset, Invoice, and InvoiceLine objects for use with Subscription Management.

**HealthCloudExt Namespace**

Added release notes to announce new method and interface in the HealthCloudExt namespace for Health Cloud.

**Retrieve Accessible PDFs with the Analytics Download API**

Added release note to announce new REST API endpoint to download accessible PDFs for Analytics assets.

**New Metadata Types for Business Rules Engine**

Modified the release note to remove references to ExpressionSetDefinitionVersion and DecisionMatrixDefinitionVersion objects, because these are subtypes of ExpressionSetDefinition and DecisionMatrixDefinition objects, respectively.

**Automate Better with Completion Action Enhancements**

Added a When section to let customers know about a previously unexpected delay in the rollout for this feature.

**Strengthen Formulas with New Functions**

Added PICKLISTCOUNT to the list of new formula functions.

**Delete Flow and Process Versions from Managed Packages**

Clarified that the feature affects first-generation managed packages and that you contact the Salesforce Partner Community to turn on the feature.

**Manage Warranties for Your Products and Assets with Manufacturing Cloud for Service**

Updated the steps to create product and asset warranties.

**New and Changed Objects for Manufacturing Cloud**

Added the objects for product and asset warranties.

**Enable Enhanced Domains (Release Update)**

Clarified the availability of Enhanced Domains and the enforcement timeline for non-production orgs.

**Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs**

Clarified which org types the setting applies to.

**New Naming Guideline for Expression Sets and Decision Matrices**

Added a release note to announce the change in the naming guideline for expression sets, expression set versions, decision matrices, and decision matrix versions.

**Updated Field History Data Retention Enforcement Period**

Added a note about updates to field history data retention limits when Field Audit Trail is enabled.

**Updated Data Retention Limit for Field Audit Trail**

Added a note about updates to Field Audit Trail data retention limits.

**Metadata API**

Added a release note to announce the availability of new metadata type SchedulingObjective.

**Tooling API New and Changed Objects**

Added a release note to announce the availability of new tooling objects SchedulingObjective and SchedulingRule.

**June 13, 2022****DevOps Center (Beta)**

The DevOps Center beta launch begins on June 20, 2022.

**Create a Manufacturing Program Template**

Added a release note to announce the new MfgProgramTemplate metadata type for Manufacturing Cloud.

**Enable Advanced Account Forecasting, Manufacturing Programs, or Default Analytics Dashboards**

Added a release note to announce the new enableIndustriesMfgAdvForecast, enableIndustriesMfgProgram, and enableIndustriesMfgIAS metadata types for Manufacturing Cloud.

**Make More Calls with Service Cloud Voice**

Added a note to announce a delayed release for 7,000 concurrent voice calls. Increased call limits are available starting June 30th, 2022.

**Improved User Experience for LWS Distortion Viewer**

Added a release note to describe updates to the LWS Distortion Viewer tool.

**Distortions Added to Lightning Web Security**

Added a release note to list the new LWS distortions.

**Enable Third-Party Integrations with Light DOM (Beta)**

Added information about updating the Salesforce CLI.

**Salesforce CDP (Customer Data Platform)**

Removed a release note about segment membership DMOs for Customer Data Platform segmentations.

**Safety Cloud**

Added a release note about latest Safety Cloud features.

**Metadata API**

Added a release note to announce the new systemVersion field on the ExternalServiceRegistration metadata type.

**Enable Enhanced Domains (Release Update)**

The enforcement of this release update is postponed to Spring '23 for production orgs. For sandboxes, the enforcement date is still Winter '23 unless you enable a new org-level setting that postpones the enforcement to Spring '23.

**Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs**

Added a release note about new My Domain setting.

**Subscription Management (Generally Available)**

Added a link to information about the Subscription Management license and charges based on the total order amount.

**Considerations for Subscription Management**

Added considerations for using and implementing Subscription Management.

## June 6, 2022

**New and Changed Objects**

Added information about an update to the LiveChatObjectAccessConfig object.

Added a release note for the AdditionalDiscount field on the ServiceContract object.

**Changed Connect REST API Response Bodies**

Added a new property to the Social Customer Service Configuration response body.

**Keep Working with Tab-Focused Dialogs (Release Update)**

Updated description of release note.

**Prevent Consecutive API Navigation Calls (Release Update)**

Updated description of release note.

**Release Updates**

Updated entries for postponed release updates.

**Create Scratch Orgs More Easily with Org Shape (Generally Available)**

Added a release note to announce that org shape for scratch orgs is generally available.

**New and Changed Objects**

Added information about the new CallCtrAgentFavTrfrDest object.

**New and Changed Objects**

Added information about the new CallCtrAgentFavTrfrDestShare object.

**Enable New Order Save Behavior (Release Update)**

Added a release note for the Enable New Order Change Behavior release update.

## May 30, 2022

### Analyze Bot Performance with New Standard Reports

Updated release note to include Dialogs Used Per Session Last 7 Days, Intents Recognized Last 30 Days, and Intents Recognized Today new standard Einstein Bot reports.

### Tooling API New and Changed Objects

Added release note for new FlowTest object (beta).

### Health Cloud Has New Metadata Types

Added the release note to announce the new TimelineObjectDefinition metadata type in the Health Cloud.

### View the Review Status of Medications in Medication Reconciliation

Updated the How section.

### Manage Associations Between Automatically Captured Emails and Related Records

Clarified that association management happens in the activity timeline.

### Get Started Faster with Data Templates (Beta)

Added release note for Data Templates feature (beta) in Salesforce Data Pipelines and CRM Analytics.

### SAQL and SQL

Removed release note stating that null handling in SAQL is generally available. It remains a beta feature.

### Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License

Updated release note to mention that Einstein Account Insights, Einstein Opportunity Insights, and Sales Analytics are not included with Performance and Unlimited editions.

### Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License

Updated release note to mention that Inbox Mobile is not included with Performance and Unlimited editions.

### Perform One-Click Actions from Repeater Widgets

Updated release note to mention that a record ID must be included in the values table to locate the record in the action.

### View Inactive Policies on the Policies 360 Component

Added the release note about viewing inactive policies on the Policies 360 Component.

### High Velocity Sales Permissions Have Changed

Added details about assigning new permissions in Performance and Unlimited Editions.

### Ensure that Each Metadata Component in a Deployment Has a Unique Name

Added release note about ensuring that each metadata component in a deployment has a unique name.

### Get Fairer Resources When Running Apex Tests

Made release note more generic, because this change now applies to both sandboxes and production orgs. Also added Developer edition to the **Where** section.

### Enable Third-Party Integrations with Light DOM (Beta)

Changed the feature back to beta and added a note that the feature is generally available only for Experience Builder sites.

### Do More with Reusable Dashboard Components

Added graphics that describe filter actions in a component.

## May 23, 2022

### Salesforce Billing Consumption Rate Upper Bounds Were Changed

Corrected the description of how consumption rate upper bounds work.

### View Calculated Insights in Builder

Added information about viewing Calculated Insight logic in the builder and SQL

**Metadata API**

Create a data source for Customer Data Platform.

**Data Type Requirement for Territory Assignments in API Versions 55.0 and Later**

Added details for references to ObjectTerritory2Association for Enterprise Territory Management.

**Enable Visualforce JavaScript Remoting Enforcement (Release Update)**

Changed the title of the release note to match the name of the release update.

**Lightning Components**

Removed the release note for using a session token instead of a cookie for Lightning apps on third-party sites because the feature was removed from the Summer '22 release.

**New Connect REST APIs**

Added a release note to announce the new Transformation API for Manufacturing Cloud.

**Get Notifications When You Retrieve the Maximum Deployable Number of Custom Fields with Metadata API**

Added details about the maximum number of custom fields allowed per deployment and how the number of custom fields retrieved is calculated.

**Business Rules Engine**

Updated the Where section of Business Rules Engine release notes to announce the availability of Business Rules Engine for Financial Services Cloud, Health Cloud, and Manufacturing Cloud.

**Edit Multiple Fields on the Report Run Page (Generally Available)**

Corrected the info on how to opt out of the feature.

**Sales Cloud Einstein**

Removed the release note about data storage locations for Einstein Lead Scoring.

**Intelligent Sales Enhancements**

Removed the release note about sample flows and components.

**Create Reports Based on Selected Salesforce Objects (Beta)**

Added info on how to enable beta feature.

## May 16, 2022

**Access Salesforce in More Regions with Hyperforce**

Added United States to Analytics Cloud

**Get Improved Mailability Insights on List Email Reports on page 486**

We added four new fields, but had listed only three. Added the fourth field to avoid confusion.

**Remove Child Records of Batch Management Job Runs on page 441**

Added a release note to announce the ability to delete batch job parts and batch job part's failed records.

**New and Changed Objects in Business Rules Engine**

Updated the release note to include a new field addition to the CalculationMatrixVersion object.

**View object hierarchies and record details using relationship graphs**

Added a release note to announce the new RelationshipGraphDefinition Tooling object for Financial Services Cloud.

**Salesforce CPQ External Configurator Is Compatible with Enhanced Domains**

Added a release note to announce that Salesforce CPQ External Configurator is compatible with enhanced domains.

**Delete Flow and Process Versions from Managed Packages**

Clarified that Salesforce Customer Support must enable the feature.

**Sales Cloud for Slack**

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

**Get Fairer Resources When Running Apex Tests**

Added a release note that describes faster Apex test execution for most users.

**Health Cloud**

Removed the release note about Care Coordination for Slack.

**Health Cloud**

Added the release note about the Clinical Data Model replacing the packaged EHR data model.

**Get Data Answers While You Search with Ask Data for Salesforce (Generally Available)**

Updated the release note title and clarified that Search Insights results are part of Ask Data for Salesforce.

**Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License**

Added a release note about features added to Performance and Unlimited editions.

**Sales Cloud Unlimited and Performance Editions Now Include High Velocity Sales Without an Add-On License**

Added a release note about inclusion of High Velocity Sales in Performance and Unlimited editions.

**High Velocity Sales Permissions Have Changed**

Added a release note about permissions changes for High Velocity Sales in Performance and Unlimited editions.

**Pipeline Inspection Permissions Have Changed**

Added a release note about permissions changes for Pipeline Inspection in Performance and Unlimited editions.

**Get Einstein Activity Capture in Performance and Unlimited Editions Without an Add-On License**

Added a release note about inclusion of Einstein Activity Capture in Performance and Unlimited editions.

**Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License**

Added a release note about inclusion of Inbox in Performance and Unlimited editions.

**Salesforce Meetings Permissions Have Changed**

Added a release note about permissions changes for Salesforce Meetings in Performance and Unlimited editions.

**Sales Cloud Unlimited and Performance Editions Now Include Einstein Conversation Insights Without an Add-On License**

Added a release note about inclusion of Einstein Conversation Insights in Performance and Unlimited editions.

**Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License**

Added a release note about inclusion of Sales Cloud Einstein in Performance and Unlimited editions.

**May 9, 2022****Legal Documentation**

Added legal documentation.

**Upgrade Your Conversational Experiences with Enhanced Bots (Generally Available)**

Updated the When section for the main Enhanced Bots release note and related release notes with more accurate availability details.

**Use Salesforce Page Objects with UTAM**

Added a release note to announce the availability of Salesforce page objects.

**New Tooling API Objects in Business Rules Engine**

Added a release note to announce the availability of new tooling API types in Business Rules Engine.

**New Tooling API Objects in Business Rules Engine**

Updated the release note with more accurate details on the new fields in the CalculationMatrix object in Business Rules Engine.

**New and Changed Objects**

Added information about the SiteRedirectMapping object available in API version 52.0 and later.

**New Connect REST API Resources**

Added the release note to announce the new Intelligent Document Management Connect REST APIs in the Health Cloud.

**Metadata API**

Added a release note to announce the availability of new metadata type DataStreamTemplate.

**Metadata API**

Removed the release note announcing the new enableIndividualOrderItemTaxAdjustments field on the existing OrderManagementSettings metadata type because the feature was removed from the Summer '22 release.

**ConnectApi Namespace**

Added the release note to announce the availability of new LoyaltyManagementConnect methods, input classes, and output classes in the ConnectApi namespace.

**Health Cloud Has New and Changed Objects**

Updated the name of a field in the Author Note object.

**Display Selected Tabs in the Patient Medication Manager**

Added a new topic for Medication Management enhancements in the Patient Medication Manager.

**View the Review Status of Medications in Medication Reconciliation**

Updated the Who section and added See Also links.

**Provide Site User Access to Medication Reconciliation Objects**

Added See Also links.

**LoyaltyManagement Namespace**

Added the release note to announce the availability of new or changed Apex classes and methods in the LoyaltyManagement namespace.

**Create Notifications with New Alert, Confirm, and Prompt Modules**

Updated the Where section with more accurate availability details.

**Create Custom Relationship Graphs with ARC**

Added that you can display ARC relationship graphs on Experience Cloud pages.

**Use the Guest User Permission Set License**

Added the When section and clarified the impact of guest user permission changes for Field Service.

## May 2, 2022

**Salesforce CDP (Customer Data Platform)**

Added a release note to announce Data Transforms for Customer Data Platform.

**Learn More from New Insights in the Activity Timeline**

Updated the availability information for Einstein Activity Capture.

**Review and Update Record Stages in Salesforce Meetings**

Added release note for Path availability in Salesforce Meetings.

**Metadata API**

Added a release note to announce the new enablePipelineInspectionSingleCategoryRollup field on the existing OpportunitySettings metadata type.

**View Savings at a Glance with the Einstein Bots Value Dashboard**

Added a release note to announce the new Einstein Bots Value dashboard managed package.

**Strengthen Formulas with New Functions**

Added a release note highlighting 18 new formula functions.

**Test One, Two, Three, Flow (Beta)**

Updated beta limitations and considerations, and added how to run, edit, or delete a flow test.

**Help More Users Succeed with Targeted Prompts**

Updated release note to include that the Utility Bar is also a targetable element.

**Utilization Management Updates**

Added a release note for data model changes and API upgrades in Utilization Management.

**Health Cloud**

Modified the Health Cloud summary to include Utilization Management updates.

**Health Cloud Has New and Changed Objects**

Added a section to specify the Medication Management objects that align with the FHIR data model.

## April 27, 2022

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

## Get Ready for the Release

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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 Summer '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.
- [Summer '22 Pre-release Signup](#). Sign up for a pre-release org to get early access to the new features.
- [Release Demos](#). Get quick video overviews of what's coming this release.
- [Summer '22 Release Website](#). Check out the new features.
- [Summer 22 Release Highlights Module](#). Get the Summer '22 Trailhead badge.
- [Release in a Box](#). Use this kit to prepare and present the new release to your org and users.



## Release Readiness Essentials

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

## How and When Do Features Become Available?

Some features in Summer '22 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

## Supported Browsers

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Supported Browsers and Devices for Lightning Experience</a>	✓			
<a href="#">Ensure IE11 Lightning Experience Users Can't Access Salesforce Classic</a>	✓			
<a href="#">Supported Browsers and Devices for Salesforce Classic</a>	✓			
<a href="#">Supported Browsers for CRM Analytics</a>	✓			

## Salesforce Overall

Update primary billing contact information directly in the Your Account app. With matrix questions in Salesforce Feedback Management, create shorter surveys and help participants complete surveys faster. In Salesforce Scheduler, share service resource availability using Appointment Invitation URL and check out two new flows. Explore many enhancements to Search and much more in Summer '22.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>General Enhancements</b>				
MFA Requirement Is in Effect and Enforcement Is Coming			✓	
Updated Field History Data Retention Enforcement Period		✓		
Keep Working with Tab-Focused Dialogs (Release Update)			✓	
Create Custom Address Fields (Beta)		✓		
<b>User Engagement</b>				
Explore Salesforce In-App Content		✓		
Help More Users Succeed with Targeted Prompts		✓		
Sync Progress to Check Off Completed Items		✓		
Discover More Resources for the Guidance Center for Admins		✓		
<b>Your Account App</b>				
Update Your Primary Billing Contact Any Time	✓			
The Business to Government Business Type Was Removed	✓			
<b>Salesforce Feedback Management</b>				
Increase Survey Completion Rates with Matrix Questions	✓			
Increase Brand Awareness by Including Your Logo on Surveys	✓			
Customize the Thank You Page Message	✓			
Extend and Grow Customer Engagement by Sharing Web Pages	✓			
Get Qualitative Feedback on Text Responses with Sentiment Insights			✓	
Enhance Customer Experience Through Sentiment Insights	✓			
<b>Salesforce Scheduler</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">View Shifts Schedule in a Calendar Format</a>			✓	
<a href="#">Share Service Resource Availability Using an Invitation URL</a>			✓	
<a href="#">Share Appointments with Assigned Service Resources</a>			✓	
<a href="#">Show Multiple Attendees Under a Single Event</a>			✓	
<a href="#">Other Changes to Salesforce Scheduler</a>			✓	
<b>Salesforce Overall Einstein</b>				
<a href="#">Allow Data Analysis with Einstein Data Exploration Consent</a>			✓	
<b>Einstein Search</b>				
<a href="#">Discover the Objects and Fields Available to Users with Search Manager</a>		✓		
<a href="#">Manage Your Knowledge Article Base Using Natural Language Search</a>	✓			
<a href="#">Receive Answers to Your Questions, Not Just Article Links, Using Einstein Search Answers (Pilot)</a>	✓			
<a href="#">Refine Knowledge Search Results with Topic Filters in Experience Cloud Sites</a>			✓	
<a href="#">Search Layouts for Salesforce Classic Is Now List View Button Layout</a>	✓			
<a href="#">Get Search Results for More Objects</a>	✓			
<b>Salesforce Data Pipelines</b>				
<b>Other Enhancements to Data Pipelines</b>	✓			

## Analytics

Sync data with improved connectors, get more customer insights with the Opportunity embedded dashboard, and make better business decisions when you use trending data to fine-tune predictions.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Reports and Dashboards</b>				
Find the Best Report Type for New Reports (Generally Available)	✓			
Edit Multiple Fields on the Report Run Page (Generally Available)	✓			
Create Reports Based on Selected Salesforce Objects (Beta)				✓
Summary Functions Now Include Median	✓			
Manage Your Reports and Dashboards in Analytics Home (Beta)			✓	
Limit Results in Tabular Reports	✓			
<b>CRM Analytics</b>				
Say Hello to CRM Analytics, New Name, Same Reliable Experience		✓		
<b>Data Integration</b>				
Check Your Data at a Glance in Data Manager (Generally Available)	✓			
Adopt Improved CRM Analytics Connectors		✓		
Match the Tableau Online Output File to Your Business Requirements	✓			
Connect More Securely to Tableau Online with Personal Access Tokens	✓			
Connect More Securely to Snowflake and Hubspot with OAuth 2.0		✓		
Customize Local Salesforce Field Metadata	✓			
Sync Data from Tableau Online		✓		
Run Sequential Recipes Faster with Staged Data (Beta)				✓
Convert Dataflows to Recipes (Beta)	✓			
Get Started Faster with Data Templates (Beta)				✓
Data Prep Fiscal Configuration Is Now Called Date Configurations and Does More			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Combine Unrelated Records with Cross Join (Generally Available)	✓			
Use Multivalue Data in Your Recipes	✓			
Appends Round More Accurately		✓		
Get a Clearer View of Your Data with Data Sampling		✓		
Search for Transformation Steps by Name		✓		
Refine Date Filtering Using Relative Dates		✓		
Find More in Your Recipe with Enhanced Global Search		✓		
Delete Node Connections		✓		
Access Column Data in Preview		✓		
Search Your Columns for Any Value		✓		
Automate Adding All Columns to an Input Node		✓		
Automate Adding Columns to the Append Node		✓		
Simplify Column Operations with a Single Filter Node		✓		
<b>Prebuilt Apps</b>				
Monitor Templated App Creation with the Enhanced App Installer	✓			
Get Your Opportunity Details in a Snap with the New Customer Insights Opportunity Embedded Dashboard	✓			
Customize the New Customer Insights Sales Performance Dashboard with Ease	✓			
Get B2C Insights with Person Account Details in Customer Insights Datasets	✓			
Monitor the Order Journey with Order Tracking Analytics	✓			
<b>App Building</b>				
Analyze Google BigQuery Data Directly (Generally Available)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">View Row, Column, and Grand Totals in Pivot Tables</a>	✓			
<a href="#">Perform One-Click Actions from Repeater Widgets</a>			✓	
<a href="#">Give Feedback When Dynamic Fields Don't Return Results</a>		✓		
<a href="#">Do More with Reusable Dashboard Components</a>		✓		
<a href="#">Improve Readability by Shortening Numbers in Your Dashboards</a>		✓		
<a href="#">Launch Explorations for Customer Data Platform with a Single Click</a>	✓			
<a href="#">Optimize Dashboard Performance with Global Filters on Salesforce Objects and CDP Data</a>	✓			
<a href="#">Add Filters to External Data Sources in Embedded Dashboards</a>	✓			
<a href="#">Facet SOQL Queries on the Same Salesforce Object with Ease</a>	✓			
<a href="#">Other Enhancements to CRM Analytics Explorer and Dashboards</a>	✓			
<a href="#">Accessibility Improvements in CRM Analytics Dashboards</a>	✓			
<a href="#">SAQL and SQL</a>		✓		
<b>Einstein Discovery</b>				
<a href="#">Reveal Untapped Insights In Your Unstructured Data (Generally Available)</a>	✓			
<a href="#">Fine-Tune Prediction Accuracy with Trending Data (Generally Available)</a>	✓			
<a href="#">Handle Missing Values in Your Datasets (Generally Available)</a>	✓			
<a href="#">Save Higher Volumes of Predictions More Quickly (Pilot)</a>				✓
<a href="#">Manage Predictions More Easily With Enhanced Settings Panels</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Package, Promote, and Distribute Your Stories (Pilot)</a>				✓
<a href="#">Expedite Coding with a New Dev Guide</a>	✓			
<a href="#">Get Predictions Using Externally Built Models in Bulk Scoring and Async Apex</a>	✓			
<a href="#">Handle Data Quality Issues During Story Creation</a>	✓			
<a href="#">Minimize Disparate Impact in Live Data (Pilot)</a>				✓
<a href="#">Uncover Bias in Multiclass Models</a>	✓			
<a href="#">Date Variable Transformations Updates</a>	✓			
<a href="#">Get Report Insights in More Languages</a>	✓			
<a href="#">Handle Missing Numerical Values in Your Datasets</a>	✓			
<b><a href="#">Analytics for Everyone</a></b>				
<a href="#">Get Data Answers While You Search with Ask Data for Salesforce (Generally Available)</a>	✓			
<a href="#">Unify All Your Analytics Assets in Analytics Home (Beta)</a>			✓	
<a href="#">Bring Data to Every Conversation with CRM Analytics for Slack (Generally Available)</a>			✓	
<b><a href="#">Analytics on Mobile</a></b>				
<a href="#">Get the Latest Version of CRM Analytics for iOS and Android</a>	✓			

## Commerce

Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2C Commerce, Commerce Einstein, Omnichannel Inventory, and Salesforce Order Management.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b><a href="#">Salesforce B2B and B2B2C Commerce</a></b>				
<b><a href="#">Sell Globally in B2C Stores</a></b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Configure Country and Tax for B2C Stores</a>	✓			
<a href="#">Static Labels Are Translated</a>	✓			
<a href="#">Show B2C Shoppers That Prices Include Tax</a>	✓			
<b>Sort Search Output by Price</b>			✓	
<b>Sort Defaults to First Menu Option</b>			✓	
<b>Use More Properties to Customize Search Input and Search Bar Components</b>			✓	
<b>Use Enhanced Workspaces to Manage Commerce Data</b>	✓			
<b>Import More Products Using a CSV File</b>	✓			
<b>Promotions</b>				
<a href="#">Drive B2C Sales with Promotions</a>	✓			
<a href="#">Create Custom Reports for Promotions</a>	✓			
<a href="#">Show More Details About Product Promotions</a>	✓			
<a href="#">Show Customers Promotion Savings</a>	✓			
<b>Give Users Permission to Integrate Third-Party Applications in B2B and B2C Commerce Stores</b>			✓	
<b>Get Developer Guidance Easier and Faster</b>		✓		
<b>Integrate a Custom Payment Component</b>		✓		
<b>Deploy and Customize B2B Checkout Flows More Easily</b>		✓		
<b>Create a Custom Checkout Experience for Your B2C Store</b>			✓	
<b>Add Accessible Navigation to Your Store</b>	✓			
<b>Search by SKU in B2B Stores</b>			✓	
<b>Commerce Einstein</b>				



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create B2B and B2C Custom Components with Commerce Einstein Recommendations and Activities APIs			✓	
Omnichannel Inventory				
Manage Inventory Availability at the Product Level			✓	
Salesforce Order Management				
Gain Insights into Order Data with Report Templates			✓	
Apply Discounts to Orders at Any Stage in the Fulfillment Process			✓	
Manage the Priority and Capacity of Your Fulfillment Locations		✓		
The B2C Commerce Integration Automatically Creates Web Stores as Needed		✓		

## Customization

Make your org more secure thanks to updated restriction rules and permissions. Improve system performance and health with enhancements to the way picklist management and values are handled. Get better address data accuracy and improve user experience with Custom Address Fields (beta).

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sharing				
Control Access to External Object Records with Restriction Rules	✓			
Create and Edit Records That a Restriction Rule Applies To	✓			
Adjust Restriction Rules Permissions		✓		
Preserve User Access to Personal Information Fields		✓		
Build More Flexible Restriction and Scoping Rules with Single Picklists	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Stronger Protection for Your Users' Personal Information (Release Update)			✓	
Delete Obsolete Shares Asynchronously		✓		
Fields				
Get a List of Custom Picklist Fields with Inactive Values		✓		
Deliver to Your Customers with Custom Address Fields (Beta)		✓		
Clean Up Inactive Picklist Values (Beta)		✓		
Bulk Manage Picklist Values (Beta)				✓
Learn Which Picklist Values Are Duplicates		✓		
Globalization				
Enable ICU Locale Formats (Release Update)			✓	
Connect with Customers Who Speak and Read Hmong and Punjabi		✓		
Use Salesforce Maps and Loyalty Management in More Languages	✓			
Review Updated Label Translations	✓			
Permissions				
Enable Permission Set Expiration and Enhanced UI (Release Update)			✓	
Manage Permission Set Assignment Expiration with an Enhanced User Experience (Generally Available)			✓	
Create Transaction Security Policies for Critical User Permissions (Generally Available)		✓		
Manage Your Permission Assignments with the User Access and Permissions Assistant			✓	
External Services				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Call External Services Registrations Natively from Apex		✓		
Update an Existing Schema Connected to Flow		✓		
Register More APIs		✓		
Salesforce Connect				
Securely Connect Data Across Amazon DynamoDB and Salesforce (Generally Available)			✓	
Securely Connect to Amazon Athena and Perform Interactive Queries from Salesforce (Pilot)				✓
Einstein Prediction Builder				
Validate Your Predictions Automatically with Data Checker			✓	
Enable Einstein Prediction Builder with Guided Setup			✓	
General Setup				
Customize and Filter Related Lists in the Lightning App Builder		✓		
Strengthen Formulas with New Functions		✓		

## Development

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				
Enable Third-Party Integrations with Light DOM (Beta)		✓		
Synthetic Shadow Aligns Closer to Native Shadow			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Relaxed Save-Time Validation Rules for Aura Components		✓		
Create Notifications with New Alert, Confirm, and Prompt Modules		✓		
Debug Your Code More Easily to Run with Lightning Web Security		✓		
Improved User Experience for LWS Distortion Viewer		✓		
Distortions Added to Lightning Web Security		✓		
Disable Pull-to-Refresh in Mobile Components		✓		
Access Device Contacts from a Lightning Web Component		✓		
Build Components in Mixed Shadow Mode (Developer Preview)		✓		
Use Salesforce Page Objects with UTAM		✓		
Enable Secure Static Resources for Lightning Components (Update, Postponed)			✓	
Einstein Vision				
Extract Structured Data from Custom Forms with Einstein OCR (Beta)		✓		
Use Einstein OCR to Extract Structured Data from Invoices (Beta)		✓		
Visualforce				
Apply Your Content Security Policy (CSP) to Visualforce Pages		✓		
Protect Your Visualforce Pages with Cross-Origin Opener Policy (COOP)		✓		
Restrict Page Resource Requests with Cross-Origin Embedder Policy (COEP)		✓		
Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing (Release Update)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Prevent Consecutive API Navigation Calls (Release Update)</a>		✓		
<a href="#">Enable Visualforce JavaScript Remoting Enforcement (Release Update)</a>		✓		
Apex				
<a href="#">Secure Apex Code with User Mode Database Operations (Beta)</a>		✓		
<a href="#">Choose Global Cache Scope for Apex Controller Methods</a>		✓		
<a href="#">Overloads Aren't Allowed on @AuraEnabled Methods</a>		✓		
<a href="#">Call Invocable Actions from Apex (Developer Preview)</a>			✓	
<a href="#">Call External Services Registrations from Apex</a>		✓		
<a href="#">Get Fairer Resources When Running Apex Tests</a>		✓		
API				
<a href="#">An Error Code Has Been Added to the Platform</a>				
<a href="#">Get Notifications When You Retrieve the Maximum Deployable Number of Custom Fields with Metadata API</a>		✓		
<a href="#">Ensure that Each Metadata Component in a Deployment Has a Unique Name</a>		✓		
<a href="#">Query with GraphQL API (Beta)</a>		✓		
<a href="#">Retrieve Accessible PDFs with the Analytics Download API</a>				
<a href="#">Legacy API Versions 7.0 Through 20.0 Are Now Retired (Release Update)</a>			✓	
<a href="#">Legacy API Versions 21.0 Through 30.0 Are Being Retired (Release Update)</a>			✓	
Packaging				
<a href="#">Determine Which Apex Classes Have Insufficient Code Coverage</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Licenses for Specific Features and User Categories with the Partner Licensing Platform (Developer Preview)				✓
Development Environments				
Create Scratch Orgs More Easily with Org Shape (Generally Available)		✓		
Updates to Developer Edition Org Expiration Policy		✓		
Platform Development Tools				
Plan and Test Your System for Scale Using Performance Assistant			✓	
Develop Platform Apps with Ease		✓		
Develop from Anywhere Using Salesforce Code Builder (Beta)		✓		
DevOps Center (Beta)				
Manage and Release Changes Easily and Collaboratively with DevOps Center (Beta)			✓	
What's New in DevOps Center Beta?			✓	
Salesforce Functions				
Salesforce Functions Updates				✓
AppExchange Partners				
Analyze External Object Usage with AppExchange App Analytics				✓
Change Data Capture				
Filter Your Stream of Change Events (Pilot)				✓
Enrich Change Events with TextArea Fields		✓		
Receive Change Event Notifications for More Objects		✓		
Platform Events				
Group Platform Events into One Stream with a Custom Channel		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Filter Your Stream of Platform Events with Custom Channels (Beta)</a>		✓		
<a href="#">Get the Result of Asynchronous Platform Event Publishing in Apex (Pilot)</a>				✓
<b>Event Bus</b>				
<a href="#">Develop Event-Driven Apps with Pub/Sub API (Generally Available)</a>		✓		
<a href="#">Connect Salesforce Events with Amazon EventBridge in AWS (Beta)</a>				✓

## Experience Cloud

Customers with Experience Cloud licenses can reap the benefits of full access to all the features included in Salesforce CMS. On LWR sites, you can build flows across all templates and add links to button and form components or any layout component that can be made into a link. Enhancements to Mobile Publisher for Experience Cloud apps make app navigation easier.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>LWR and Aura Sites</b>				
<a href="#">Use Improved Site Search and Enhanced CMS Workspaces (Beta)</a>			✓	
<a href="#">Create Multilingual LWR Sites (Generally Available)</a>		✓		
<a href="#">Localized Language Is Automatically Detected for LWR Sites</a>	✓			
<a href="#">Work Smoothly with Usability Enhancements in Experience Builder</a>	✓			
<a href="#">Redirect Your Previous Force.com Site URLs</a>		✓		
<a href="#">Refine Knowledge Search Results with Topic Filters</a>			✓	
<b>Components</b>				
<a href="#">Let Your Site Users Deactivate Their Account</a>			✓	
<a href="#">Add Links to Content and Layout Components in LWR Sites</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Flows in LWR Sites		✓		
Add Messaging for Web to an Experience Site (Generally Available)			✓	
Developer Productivity				
Update Sites with the Lightning Locker Property		✓		
Optional URL Query Parameters Are Now Enabled for All		✓		
@salesforce/community Supports 18-Character IDs		✓		
Site Performance				
Create Records More Efficiently for High-Volume Sites			✓	
Shared Certificate Option Is Being Retired		✓		
Cache Apex Calls for Guest Users Only (Beta)			✓	
Tell Customers When There's Too Much Traffic		✓		
Service Not Available Page Is Supported on Salesforce Edge Network		✓		
Test a Custom Domain with the Salesforce CDN Partner in a Sandbox		✓		
Test Your Site's Custom Domain That Uses a Third-Party CDN		✓		
Security and Sharing				
Restore Access with More Granular Personal Information Fields Permission		✓		
Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions (Release Update)			✓	
Set Up Single Sign-On with Microsoft Credentials			✓	



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Public Can Access Site Option Has a New Name</a>		✓		
<a href="#">Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)</a>		✓		
<a href="#">Add Enhanced Protection to Visualforce Sites</a>		✓		
<a href="#">Upgrade Your SAML Framework (Release Update)</a>			✓	
<b>Other Changes</b>				
<a href="#">Do More with Mobile Publisher for Experience Cloud</a>			✓	
<a href="#">Access Full CMS Functionality as an Experience Cloud Customer</a>	✓			
<a href="#">File Previews Limited to First 500 Pages</a>	✓			
<a href="#">HTML Tags in Chatter Feeds Are Changing</a>	✓			

## Field Service

Enhanced Scheduling and Optimization helps you get your schedule in top shape with improved scheduling and travel time predictions, and the flexibility to select which territories use Enhanced Optimization. Troubleshoot work order generation issues with new status messages that help you take the next steps. Customers can stay COVID-safe by using their own devices to sign service reports. The Field Service mobile app keeps work running smoothly with automatic status changes, limited location tracking, and an all-in-one view of appointments, work orders, and absences for mobile workers.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Resource Management</b>				
<b>Enhanced Scheduling and Optimization</b>				
<a href="#">Boost Your Scheduling and Optimization Experience</a>			✓	
<a href="#">Use Enhanced Scheduling and Optimization Only on Selected Territories</a>			✓	
<a href="#">Create Scheduled Jobs with More Capabilities</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get More Accurate Travel Time Predictions with Travel Modes</a>			✓	
<a href="#">Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments</a>			✓	
<a href="#">Schedule Multiple Flexible Breaks with Enhanced Work Rules</a>			✓	
<a href="#">Account for Holiday Closures</a>			✓	
<a href="#">Explore the Impact of Optimization with Optimization Hub (Beta)</a>			✓	
<a href="#">Get Scheduling Recommendations with Appointment Insights (Beta)</a>			✓	
<a href="#">Scale Optimization Requests</a>			✓	
<b>Appointment Bundling</b>				
<a href="#">Keep Your Bundles Up to Date</a>			✓	
<a href="#">Align the Properties of the Bundle Members with the Bundle</a>		✓		
<a href="#">Keep an Eye on Your Automatic Bundling Requests</a>		✓		
<a href="#">Save the Hassle of Scheduling When You Create a Bundle</a>	✓			
<a href="#">Enhance Appointment Bundling with Formula Fields</a>	✓			
<a href="#">Get Meaningful Messages for Appointment Bundling</a>	✓			
<b>Automate More With Shift Templates</b>				
<a href="#">Use the Guest User Permission Set License</a>			✓	
<b>Asset Management</b>				
<a href="#">Gain Insight into Work Order Generation Status</a>	✓			
<a href="#">Guide Users with Paths for Service Contracts</a>			✓	
<a href="#">Pinpoint the Location of Your Assets and Service Appointments</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Get More Value from OEM with Assets</b>		✓		
<b>Give Customers Higher Discounts on Service Contracts</b>			✓	
<b>Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)</b>			✓	
<b>Customer Engagement</b>				
<b>Appointment Assistant</b>				
Let Customers Sign Reports on Their Personal Device			✓	
Get More from the Real-Time Location Component			✓	
See the Mobile Worker's Location Move Smoothly on the Map	✓			
Hear What Customers Have to Say About Their Experience			✓	
<b>Visual Remote Assistant</b>				
Create and Refresh Sandbox Accounts		✓		
Manage Your Account		✓		
Deliver Instant Support for Your Agents		✓		
Disable Image Storage		✓		
<b>Mobile</b>				
<b>Make Appointment Status Changes Easier</b>			✓	
<b>Limit Mobile Workers' Location Tracking for Appointment Assistant</b>			✓	
<b>Combine Work and Absence Schedules in the Mobile App (Beta)</b>			✓	
<b>Show or Hide the Map</b>	✓			
<b>Get Your Work Done with Fewer Flow Steps</b>	✓			
<b>Spotlight on Field Service Content</b>				
<b>Watch Videos</b>				

## 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 our public cloud partners allows us to expand quickly and also helps us meet local data storage requirements. Hyperforce allows us to grow using common tools, deployment patterns, security practices, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Access Salesforce in More Regions with Hyperforce</a>			✓	

## Industries

Get started faster with Guided Setup support in several Industries clouds. Track your carbon footprint with Net Zero Cloud. Manufacturing Cloud helps leverage customer forecasts into business opportunities for you. Nurture relationships and run branches better with Financial Services Cloud. Health Cloud empowers care providers to support patients more closely and helps patients do more for themselves, while Loyalty Management brings you closer to your program partners and members with enhanced transaction journals and filters. Public Sector Cloud brings enhanced support for inspections, investigations, and health care plans.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Consumer Goods Cloud</b>				
<b>Trade Promotion Management</b>				
<a href="#">See a Consolidated Plan for an Account</a>			✓	
<a href="#">Define Funds for Your Promotions</a>			✓	
<a href="#">Set up and View Your Trade Calendar</a>			✓	
<a href="#">Set up and Monitor Your Promotions</a>			✓	
<a href="#">Configure the Appearance of Your Promotions</a>			✓	
<a href="#">Settle Retailer Claims</a>			✓	
<a href="#">Understand Performance with Real-time Reporting</a>			✓	
<a href="#">Configure Your Key Performance Indicators</a>			✓	
<b>Retail Execution</b>				
<a href="#">Get Accurate Order Prices Offline with Penny Perfect Pricing</a>		✓		
<a href="#">Get Insights About Stores and Products with Store Audits and Surveys</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Effective Visits with Job Lists		✓		
Track Your Inventories Accurately		✓		
Track and Assess Your Assets		✓		
Scan Faster and Better with External Barcode Scanners		✓		
Manage Teams Better with Supervisors		✓		
Collaborate with Your Team Better with Notifications and Shared Notes		✓		
Create Dynamic Customer Sets with Segmentation Rules		✓		
Monitor Visits and Product Sales with Live Reports		✓		
Collect and Record Payments in the Order Header Tab		✓		
Ensure Service Continuity with Rep Substitutes		✓		
<b>Consumer Goods Has New Objects</b>		✓		
<b>Financial Services Cloud</b>				
<b>Actionable Relationship Center</b>				
Create Custom Relationship Graphs with ARC	✓			
<b>Interaction Summaries</b>				
Add Interaction Attendee Related List to Person Accounts and Contacts	✓			
<b>Financial Accounts and Transactions</b>				
Provide a Comprehensive View of Customer's Financial Accounts Details			✓	
<b>Interest Tags</b>				
Personalize Interaction Summaries with Interest Tags	✓			
<b>Record Association Builder</b>				
View Error Event Details for Record Association Build Process			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Receive Notifications About Error Events</a>			✓	
<a href="#">Track Person Account Record Changes Using Record Association Builder</a>			✓	
<a href="#">Create Association Criteria with Contact and Interaction Summary</a>			✓	
<a href="#">Create Multiple Update Event Type Association Criteria</a>				
<a href="#">Create Branch Unit Related Record Reports with More Objects</a>	✓			
<b>Branch Management</b>				
<a href="#">Manage Branch Unit Record Pages More Easily</a>			✓	
<a href="#">View Branch Unit Customer Records on Account Page Layouts</a>			✓	
<a href="#">View Bankers' Branch Assignments at a Glance</a>				
<a href="#">Customize the Branch Unit Related Record Object</a>			✓	
<a href="#">Do More with the Branch Selector</a>			✓	
<b>Record Rollup</b>				
<a href="#">Update Records Silently</a>			✓	
<b>Compliant Data Sharing</b>				
<a href="#">Share Custom Object Records</a>			✓	
<b>Dynamic Dashboard</b>				
<a href="#">Prepare for Dynamic Dashboard Limit Changes</a>	✓			
<b>Financial Services Cloud Community Licenses</b>				
<a href="#">Prepare for Community License Changes</a>			✓	
<b>Insurance for Financial Services Cloud</b>				
<a href="#">Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics</a>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Maximize Policy Renewals with Policy Renewal Prediction App	✓			
View Inactive Policies on the Policies 360 Component	✓			
<b>New and Changed Financial Services Cloud Object Fields</b>		✓		
<b>REST API</b>		✓		
<b>New Financial Services Cloud Metadata Types</b>		✓		
<b>New Tooling API Objects in Financial Services Cloud</b>		✓		
<b>Health Cloud</b>				
<b>Unified Health Scoring</b>				
Define a Unified Health Profile for Your Organization's Patients			✓	
Calculate Scores for Patients Using the Salesforce Customer Data Platform			✓	
Identify Patients that Need Immediate Care using the Score List for Unified Health Scoring Lightning Component			✓	
Understand Patients Better with the Score Details For Unified Health Scoring Lightning Component			✓	
Suggest Score-Based Contextual Actions with the Dynamic Actions For Unified Health Scoring Lightning Component			✓	
Analyze Action Logs to Understand Health Outcome Trends	✓			
<b>Medication Management</b>				
Provide Site User Access to Medication Reconciliation Objects			✓	
View the Review Status of Medications in Medication Reconciliation	✓			
Display Selected Tabs in the Patient Medication Manager			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Medication Management Features Have Been Rebranded	✓			
<b>Identity Verification</b>				
Verify the Identity of Your Customer		✓		
Verify the Identity of Your Customer and Their Authorized Representative		✓		
Extend Your Identity Verification Flows with Custom Flow Screen Components		✓		
Use External Data to Verify Caller Identity		✓		
Translate Custom Field Labels for Global Users		✓		
Use Setup Assistant to Get Up and Running with Identity Verification		✓		
<b>Intelligent Sales Enhancements</b>				
Keep Track of Expiring Products	✓			
See Upcoming Action Items on the New Mobile App Home Page	✓			
Use External Data Sources for Expected Quantities in Cycle Counts			✓	
<b>Promote Holistic Care of Patients with Timeline</b>			✓	
<b>Advanced Patient Card</b>			✓	
<b>Enable Guest Users to Schedule Their Own Appointments</b>			✓	
<b>Analyze Patients' Medication Patterns with Healthcare Analytics</b>	✓			
<b>Candidate Patient Object Is No More</b>			✓	
<b>Utilization Management Updates</b>	✓			
<b>Replacing the EHR Data Model with the Clinical Data Model</b>			✓	
<b>Objects in the Clinical Data Model have Updated Sharing Options</b>		✓		
<b>Health Cloud Has New and Changed Objects</b>		✓		



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>New and Changed Invocable Action in Health Cloud</b>		✓		
<b>Health Cloud Has New Metadata Types</b>		✓		
<b>Connect REST API</b>				
Changed Connect REST API Resources		✓		
New Connect REST API Resources		✓		
Changed Connect REST API Request Bodies		✓		
Changed Connect REST API Response Bodies		✓		
<b>HealthCloudExt Namespace</b>		✓		
<b>Loyalty Management</b>				
<b>Member Engagement Attributes</b>				
Track Members' Engagement with Your Program	✓			
Update Members' Progress and Reward Members	✓			
<b>Expanded Partner Management</b>				
Increase Partner Collaboration with Joint Promotions		✓		
Specify Prepaid As Billing Type for Loyalty Program Partners	✓			
Specify Postpaid As Billing Type for Loyalty Program Partners	✓			
Update Partner Balances Automatically		✓		
<b>Promotion Setup</b>				
Run Transaction Processing Simulations	✓			
Filter Transactions Quickly by Using In-Built Logic	✓			
Verify Members' Segment Before Processing Transactions			✓	
Schedule Batch Jobs to Process Transaction Journals		✓		
Create Parameters While Designing Rules		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Currency Management</b>				
Update the Qualifying Points Balance Quickly			✓	
Auto-Calculate the Expiration Date for Points Credited for Canceled Redemptions		✓		
Provide Contextual Expiration Dates for Points	✓			
<b>Update Partner Product Details with Partner's Product Cost</b>		✓		
<b>Process Transactions Based on Members' Segments</b>		✓		
<b>Loyalty Management for Commerce</b>				
Automatically Adjust Points and Vouchers for Canceled Orders or Items				✓
Use Order Data Directly Instead of Using Salesforce Order Management				✓
Allow Members to Add More Products and View their Activity History				✓
<b>Use a Single Code for Multiple Vouchers</b>	✓			
<b>Keep All Your Files in One Place</b>			✓	
<b>Consolidate Members' Points with Ease</b>			✓	
<b>Analytics for Loyalty</b>				
Analyze Promotion Performance and Identify Potential Fraud with Loyalty Analytics	✓			
Add Segments to Promotions Directly from Your Dashboard				
<b>New and Changed Objects in Loyalty Management</b>		✓		
<b>New and Changed Invocable Actions in Loyalty Management</b>		✓		
<b>New and Changed Loyalty Management Metadata Types</b>		✓		
<b>New and Changed Loyalty Management Connect REST APIs</b>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Apex: New and Changed Items in Loyalty Management</b>				
ConnectApi Namespace				
LoyaltyManagement Namespace				
<b>Manufacturing Cloud</b>				
<b>Manage Your Program-Based Business</b>				
Define Relationships Between Your Products and Customer Products			✓	
Define Program Templates for Forecasts			✓	
Generate Supplier Forecasts with Data Processing Engine Templates			✓	
Import Forecast Data from CSV Files			✓	
Use Templates to Easily Create Manufacturing Programs			✓	
Transform Forecast Facts to Opportunities or Quotes to Sales Agreements			✓	
<b>Manage Warranties for Your Products and Assets with Manufacturing Cloud for Service</b>			✓	
<b>Identity Verification for Manufacturing Cloud</b>				
Verify the Identity of Your Manufacturing Customers		✓		
Verify the Identity of Your Manufacturing Customers and Their Authorized Representatives		✓		
Extend Your Identity Verification Flows with Custom Flow Screen Components in Manufacturing Cloud		✓		
Use External Data to Verify Caller Identity in Manufacturing Cloud		✓		
Translate Custom Field Labels for Global Users in Manufacturing Cloud		✓		
Use Setup Assistant to Get Up and Running with Identity Verification in Manufacturing Cloud		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Develop Accurate Forecasts and Grow Your Business</a>	✓			
<a href="#">Improve Your Manufacturing Plan with Order Forecasts</a>		✓		
<a href="#">New and Changed Objects for Manufacturing Cloud</a>		✓		
<a href="#">New Connect REST APIs</a>		✓		
<a href="#">New Manufacturing Cloud Metadata Types</a>		✓		
<b>Public Sector Solutions</b>				
<a href="#">Get Up and Running with Ease by Using Guided Setup</a>			✓	
<a href="#">Bring Simplicity to Complex Investigations with Dynamic Assessments</a>			✓	
<a href="#">Meet Your Constituents' Health Care and Social Services Needs by Using Care Plans</a>			✓	
<a href="#">Change in Permissions for the Account Object</a>			✓	
<a href="#">New Objects in Public Sector Solutions</a>			✓	
<a href="#">REST API</a>		✓		
<a href="#">PublicSectrStIn Namespace</a>				
<b>Net Zero Cloud</b>				
<a href="#">Create Building Energy Intensity Benchmark</a>				
<a href="#">Manage Carbon Footprint Data Gaps</a>				
<a href="#">Monitor Your Carbon Footprint with Net Zero Analytics</a>	✓			
<a href="#">Reduce Your Carbon Footprint with Energy Consumption Predictions</a>		✓		
<a href="#">Achieve Net Zero Faster Using Data Driven Insights</a>				
<a href="#">Changed Objects for Net Zero Cloud</a>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Industries Common Components</b>				
<b>Action Plans</b>				
Schedule Recurring Action Plans	✓			
Customize the Display Order for Tasks and Document Checklist Items	✓			
Attach Files to Action Plans	✓			
<b>AI Accelerator</b>				
Configure a Machine Learning Model to Get Predictions			✓	
Customize the Feature Extractor's Default Configuration			✓	
Save Extracted Model Features and Responses During Real-Time Scoring			✓	
Show Predictions on Lightning Pages		✓		
AI Accelerator Has New Objects		✓		
AI Accelerator Has a New Platform Event		✓		
AIAccelerator Has New Tooling API Objects		✓		
Connect REST APIs		✓		
AiAccelerator Namespace				
<b>Discovery Framework</b>				
Discovery Framework			✓	
Discovery Framework Objects		✓		
<b>Batch Management</b>				
Select the Process Type for a Batch Job		✓		
Remove Child Records of Batch Management Job Runs		✓		
Changed Objects in Batch Management		✓		
Changed Batch Management Metadata Types		✓		
<b>Business Rules Engine</b>				
Invoke Decision Matrices from Flows		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Invoke Expression Sets from Flows</a>		✓		
<a href="#">Add Automated Decisions to Workflows Created with Third-Party Tools</a>		✓		
<a href="#">Create Rules in a Compact, Lookup-Table Format with Decision Tables</a>		✓		
<a href="#">Visualize Conditional Paths with Branching</a>		✓		
<a href="#">Build Conditions Faster Using the Enhanced Condition Builder</a>		✓		
<a href="#">Build Your Expression Sets Quickly Using Templates</a>		✓		
<a href="#">Control Sharing and Editing of Rules with Metadata APIs</a>		✓		
<a href="#">Use the LIKE and NOTLIKE Functions Instead of Operators</a>		✓		
<a href="#">New Naming Guideline for Expression Sets and Decision Matrices</a>		✓		
<a href="#">New and Changed Objects in Business Rules Engine</a>		✓		
<a href="#">New Invokable Actions For Business Rules Engine</a>		✓		
<a href="#">New Metadata Types for Business Rules Engine</a>		✓		
<a href="#">New Tooling API Objects in Business Rules Engine</a>		✓		
<a href="#">Connect REST APIs</a>		✓		
<b>Decision Table</b>				
<a href="#">Enhance the Performance of Your Decision Table</a>		✓		
<a href="#">Changed Objects in Decision Table</a>		✓		
<a href="#">Changed Decision Table Metadata Types</a>		✓		
<a href="#">Changed Tooling API Objects in Data Table</a>		✓		
<a href="#">Use Decision Tables as Part of Business Rules Engine</a>		✓		
<b>Einstein Relationship Insights</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhance Your Prospects with Recommendations from Colleagues			✓	
Expand Relationship Recommendation Scope with Salesforce Files	✓			
Explore Structured Relationships Between Salesforce Records	✓			
Correct Misclassified Records	✓			
Updated Brand Guidelines	✓			
<b>Intelligent Document Reader</b>				
Automate Data Capture with Mappings				
Improve Data Extraction Efficiency by Using Confidence-Level Scores			✓	
Set Up Data Extraction Easily with Multiple Target Objects in Mappings			✓	
Share Form Fields Across Mappings for Document Type			✓	
Save Your Partially Mapped Form Fields			✓	
Enhanced Form Field Mapping			✓	
Accurately Extract Field Names			✓	
Refine Mappings by Deleting Unnecessary Forms			✓	
Navigation Easily Between Form Pages			✓	
Use Intelligent Document Reader in Regions Compliant for Data Residency				
Intelligent Document Reader Has New Objects		✓		
Intelligent Document Reader Has New Metadata Types		✓		
Intelligent Document Reader Has New Tooling API Objects		✓		
Connect REST API		✓		
<b>Intelligent Form Reader</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Set Up Data Extraction Easily with Multiple Target Objects in Mappings</a>		✓		
<a href="#">Refine Mappings by Deleting Unnecessary Forms</a>		✓		
<a href="#">Extended Data Residency Compliance</a>		✓		
<a href="#">Connect REST API</a>		✓		
<b>Sentiment Insights</b>				
<a href="#">Get Qualitative Feedback on Survey Responses</a>			✓	
<a href="#">Sentiment Insights Has New Objects</a>			✓	
<b>Record Alerts</b>				
<a href="#">New Snooze Until Date on Record Alerts</a>		✓		
<a href="#">Generate Reports on Record Alerts</a>			✓	
<a href="#">OmniStudio Alert Card Is Now Available in the Salesforce Platform</a>		✓		
<a href="#">Default Icons Are Added to New Record Alert Severity Values</a>		✓		
<a href="#">Provide Your Agents with Localized Record Alerts</a>			✓	
<a href="#">Use the New Generic Alert Card for Non-Aggregation Scenarios</a>			✓	
<a href="#">Search the Record Alerts List View</a>		✓		
<a href="#">Connect REST API</a>		✓		
<b>Intelligent Document Automation</b>				
<a href="#">Map More Field Types from Forms</a>		✓		
<a href="#">Create Document Checklist Items Automatically</a>				

## Mobile

Forecast types are grouped by user role, including quantity measures, schedule dates, and product dates. Mobile Publisher updates include Enhanced Mobile App Security (pilot), default bottom tab bar navigation visibility, and new navigation features. In Briefcase Builder, related record priming is generally available, higher record limits offer increased flexibility, and new filters were added.



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce Mobile App</b>				
<b>Everything That's New in the Salesforce Mobile App</b>				
View More Forecast Types in the Salesforce Mobile App			✓	
Enforcing Certificate Pinning Available for Android				✓
<b>Mobile Publisher</b>				
Mobile Publisher Requirements	✓			
Plan for Managed Public Option for Android's Retirement	✓			
Enhanced Mobile App Security Integration (Pilot)	✓			
Lightning Web Runtime (LWR) Support on the Publisher Playground App	✓			
Access to Mobile Device Contacts Comes to Mobile Publisher Apps	✓			
Let Experience Cloud Site Users Deactivate Their Account			✓	
Allow App Buyers Access to External Accounts for B2B Stores			✓	
Force Experience Cloud App Users to Update for Enhanced Domains			✓	
Bottom Tab Bar Navigation Is Visible by Default			✓	
Make Navigation Easy for Your Users			✓	
<b>Notifications</b>				
Stay Connected with Custom Notifications on Slack			✓	
<b>Briefcase Builder</b>				
Allocate Records to Your Mobile Workforce with More Flexibility			✓	
Filter Records by User ID			✓	
Get Relevant Data with Related Record Priming (Generally Available)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>General</b>				
<a href="#">Prepare for New Alert, Confirm, and Prompt Modules and Components</a>				
<a href="#">Disable Pull-to-Refresh on Selective Pages</a>				

## Pardot

You can now apply completion actions to subsets of prospects with conditional logic. You also get sharable campaigns in Lightning, email bounce reports, and improvements to enhanced landing pages. Plus, get real-time prospect updates in Slack with the new Account Engagement app for Slack.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Marketer Experience</b>				
<a href="#">Automate Better with Completion Action Enhancements</a>	✓			
<a href="#">Send Slack Notifications with Completion Actions (Generally Available)</a>	✓			
<a href="#">Share Individual Campaigns with Colleagues in Lightning</a>			✓	
<a href="#">Control Your Canvas for Email Templates and Email Content</a>			✓	
<a href="#">Pardot Drip Programs Are Being Retired</a>	✓			
<a href="#">Form Security Features Now Mandatory</a>			✓	
<b>Data and Content</b>				
<a href="#">Review Email Bounce Data in One Report</a>			✓	
<a href="#">Improvements to Enhanced Landing Page Experience</a>			✓	
<a href="#">Get Improved Mailability Insights on List Email Reports</a>	✓			
<b>Manage and Extend Pardot</b>				
<a href="#">Pardot API: New and Changed Items</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Pardot Classic App Is Being Retired</a>	✓			

## Quip

Get the most out of your Salesforce data with Quip. Use multi-factor authentication to protect your Quip data. Simplify Quip user account and API key management with new Quip API methods. Get faster performance with enhanced, more lightweight Quip API methods. Use new fields in Quip objects to gather more accurate Quip user engagement metrics.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">When to Expect Quip Features</a>	✓			
<a href="#">Multi-Factor Authentication Enforcement for Quip Happens in May</a>			✓	
<a href="#">Simplify Quip User Account Management with the Quip SCIM API</a>		✓		
<a href="#">Simplify API Key Management with the Quip Admin API</a>		✓		
<a href="#">Get Better Performance with the Quip Admin API</a>		✓		
<a href="#">Get Better Quip API Performance with New Folder Limits</a>		✓		
<a href="#">Gather More Quip User Engagement Metrics</a>		✓		

## Revenue

Use Subscription Management to sell subscriptions and drive more revenue. Enable a release update in Salesforce CPQ, and use Salesforce CPQ Plus to track asset lifecycles. Review a change in Salesforce Billing.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Subscription Management (Generally Available)</a>				
<a href="#">Use Subscription Management to Manage Subscription Sales (Generally Available)</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Power Your Subscription Business with the Subscription Management API (Generally Available)</b>			✓	
<b>Score Invoices for Late-Payment Risk Using Einstein Collections (Beta)</b>			✓	
<b>Considerations for Subscription Management</b>			✓	
<b>Salesforce CPQ and Billing</b>				
<b>Salesforce CPQ</b>				
Experience Browser Performance Improvements for Salesforce CPQ (Release Update)			✓	
Get Customer Asset Lifecycle Management with Salesforce CPQ Plus			✓	
Salesforce CPQ External Configurator Is Compatible with Enhanced Domains			✓	
<b>Salesforce Billing Consumption Rate Upper Bounds Were Changed</b>			✓	

## Sales

Use new Sales Enablement features to improve your company's training and enablement experience. Unlimited and Performance Edition orgs can access several Sales Cloud features without purchasing add-on licenses. You can enable person accounts without reaching out to Salesforce Support. We're also rolling out lots of new features for Collaborative Forecasts, Salesforce Maps, Einstein Conversation Insights, and other Sales Cloud features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Core Sales Features</b>				
<b>Accounts</b>				
Enable Person Accounts Without Contacting Salesforce Support			✓	
<b>Collaborative Forecasts</b>				
Customize Cumulative Rollup Names		✓		
Choose More Opportunity Fields to Include or Exclude from Your Forecasts		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">View All User Role-Based Forecast Types in the Salesforce Mobile App</a>			✓	
<a href="#">View Corporate and Forecast Currency Units in Collaborative Forecasts</a>		✓		
<b>Other Changes in Core Sales Features</b>				
<a href="#">Share Individual Campaigns with Colleagues in Lightning</a>			✓	
<a href="#">Data Type Requirement for Territory Assignments in API Versions 55.0 and Later</a>		✓		
<a href="#">Enable New Order Save Behavior (Release Update)</a>			✓	
<b>Sales Enablement (myTrailhead)</b>				
<a href="#">Align Your Admin Experience with Enablement Site Terminology Changes</a>		✓		
<b>Revenue Intelligence</b>				
<a href="#">Get Revenue Insights with or without Collaborative Forecasts Enabled</a>	✓			
<b>Pipeline Inspection</b>				
<a href="#">Close More Deals with New Insights Sources and Recommended Actions in Einstein Deal Insights</a>			✓	
<a href="#">Manage Forecasting Rollups for Pipeline Inspection</a>			✓	
<a href="#">Rename Forecast Category Metrics for Pipeline Inspection</a>			✓	
<a href="#">Pipeline Inspection Permissions Have Changed</a>			✓	
<b>Productivity Features</b>				
<b>Einstein Activity Capture</b>				
<a href="#">Manage Associations Between Automatically Captured Emails and Related Records</a>		✓		
<a href="#">See More Info When Sensitive or Automated Emails Aren't Shared Automatically</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Discover Lead Objections Sooner with a New Einstein Email Insight		✓		
Get Another Option for Adding Users to a Configuration		✓		
Get Einstein Activity Capture in Performance and Unlimited Editions Without an Add-On License			✓	
<b>Email Experience</b>				
Configure a Single Default No-Reply Address from Organization-Wide Addresses in Setup	✓			
Verify Your Email Address to Send Email Through Salesforce	✓			
Updated Automated Email Send Limits in High Velocity Sales			✓	
<b>Email Templates</b>				
Control Your Workspace in Email Template Builder and Email Content Builder	✓			
Pad Your Template with Confidence in Email Template Builder	✓			
<b>Activities</b>				
Spot Overdue Tasks Right Away	✓			
Learn More from New Insights in the Activity Timeline	✓			
Focus on Insights Faster with a Unified Layout			✓	
See Why Sensitive or Automated Emails Aren't Shared		✓		
Manage Automatically Associated Records from the Email Dropdown in the Activity Timeline	✓			
<b>Salesforce Inbox</b>				
Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License			✓	
Inbox Mobile App	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Calendar</b>				
Create an Event Quickly by Clicking in Availability View			✓	
Expand and Collapse User Lists			✓	
<b>Salesforce Maps</b>				
<b>Salesforce Maps</b>				
Access the Salesforce Maps Portfolio in More Languages	✓			
Identify Data Coverage for Salesforce Maps and Related Products	✓			
Access Updated NAICS Codes	✓			
<b>Salesforce Maps Territory Planning</b>				
Navigate Datasets, Alignments, and Approval Requests Easily	✓			
Plan Territories Using the Latest Boundaries	✓			
Establish Custom Relationships in Datasets	✓			
Import Data with Greater Flexibility in CSV Files	✓			
Assign Roles Within Territories	✓			
Manage Assignments for US Standard and Point ZIP Codes	✓			
<b>Salesforce Meetings</b>				
<b>Salesforce Meetings Permissions Have Changed</b>			✓	
<b>Review and Update Record Stages in Salesforce Meetings</b>			✓	
<b>Einstein Conversation Insights</b>				
<b>Sales Cloud Unlimited and Performance Editions Now Include Einstein Conversation Insights Without an Add-On License</b>			✓	
<b>Get Notifications and Information About Follow-Up Items</b>	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
See Call Questions Automatically with Questions Insights	✓			
Comment on Video Call Segments	✓			
Filter by Insights and See Insights in Call Transcripts	✓			
Updates to Automatic Insights	✓			
High Velocity Sales				
See Related Sales Cadences in Task Reports	✓			
Updated Send Limits for Automated Emails in High Velocity Sales			✓	
High Velocity Sales to Be Renamed Sales Engagement	✓			
Sales Cloud Unlimited and Performance Editions Now Include High Velocity Sales Without an Add-On License			✓	
High Velocity Sales Permissions Have Changed			✓	
Sales Cloud Einstein				
Estimate Your Company's Return on Investment for Einstein Lead Scoring	✓			
Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License			✓	
Sales Cloud for Slack (Beta)				
Check Out Sales Cloud for Slack (Beta)			✓	
Gmail Integration				
Manage Associations For Emails in the Gmail Integration with Einstein Activity Capture	✓			
Integration with Microsoft®				
Outlook Integration				
Manage Associations for Emails in the Outlook Integration with Einstein Activity Capture	✓			



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce for Outlook</b>				
Salesforce for Outlook Retirement Is Rescheduled for June 2024	✓			
Find Version-Specific Salesforce for Outlook Release Notes	✓			
<b>Other Changes in the Sales Cloud</b>				
<b>Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License</b>	✓			

## Salesforce CDP

Customer Data Platform, formerly Salesforce CDP, helps you connect and unify customer data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Activate loyalty, transaction, engagement attributes, and more from Customer Data Platform. Marketers can send additional customer profile information to marketing platforms, like Marketing Cloud Engagement, to enhance personalized communications. As a developer, you can use the CDP Python connector to leverage the power of Query API to extract data from Customer Data Platform into your environment.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce CDP Is Now Customer Data Platform</b>	✓			
<b>Connect and Ingest</b>				
Save Time with Default Value Suggestions in Calculated Insights	✓			
Ingest Data from More Sources with the Google Cloud Storage Connector			✓	
Use B2C Commerce Custom Product Attributes Across Customer Data Platform	✓			
Send Data Actions to Multiple Salesforce CRM Orgs	✓			
<b>Model and Unify</b>				
View All Identity Resolution Summary Statistics Together		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Test Multiple Identity Resolution Rulesets Faster</a>		✓		
<a href="#">Get More Details About Recent Ruleset Jobs</a>		✓		
<a href="#">Manage Data Model Object (DMO) Relationships</a>		✓		
<b>Segmentation and Activations</b>				
<a href="#">Analyze Segment Membership Data</a>	✓			
<a href="#">Filter Segments with More Operators</a>	✓			
<a href="#">Build Segments through APIs</a>	✓			
<a href="#">Share Predefined Segments with Other Salesforce Orgs</a>	✓			
<a href="#">Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform</a>			✓	
<a href="#">Copy Activations for Easy Reuse in Segments</a>	✓			
<a href="#">Personalize Your Activation Data Using Related Profile Attributes (Beta)</a>	✓			
<a href="#">View All Your Attributes with the Improved Attribute Library</a>	✓			
<b>Build and Share</b>				
<a href="#">Deploy Amazon S3 Data Streams from Data Kits</a>		✓		
<a href="#">Install or Update Data Kits That Power Standard Data Bundles</a>	✓			
<a href="#">Add Calculated Insights to Data Kits for Easy Reuse</a>		✓		
<a href="#">Add More Measures to Calculated Insights</a>	✓			
<a href="#">View Calculated Insights in Builder</a>	✓			
<a href="#">Package and Deploy Ingestion API Data Streams for Easy Reuse</a>		✓		
<b>Development</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Navigate the Customer Data Platform Developer Journey</a>	✓			
<a href="#">Customer Data Platform API: New and Changed Items</a>	✓			
<a href="#">Download Release Notes PDF for Salesforce CDP Releases Before Winter '22</a>	✓			

## Salesforce Flow

Salesforce is continuing its investment in Flow by launching new capabilities that make it easier to get work done, while seamlessly delivering experiences that engage customers. With that in mind, Einstein Automate is now Salesforce Flow. Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration. 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
<a href="#">Flow Integration</a>			✓	
<a href="#">OmniStudio</a>				✓
<b>Flow Builder</b>				
<b>Flow Builder Updates</b>				
<a href="#">Use Formulas as Flow Entry Conditions</a>		✓		
<a href="#">Add Custom Icons to Apex-Defined Invocable Actions</a>			✓	
<a href="#">Add Section Headers to Flow Screens</a>		✓		
<a href="#">Find Connected Flow Elements Faster with Go To Connector Enhancements</a>		✓		
<a href="#">Place Name and Address Record Fields Directly on Flow Screens (Beta)</a>		✓		
<a href="#">Screen Editor Accessibility Improvements in Flow Builder</a>		✓		
<a href="#">Get Better Performance with Custom Labels</a>		✓		
<b>Flow Trigger Explorer</b>				
<a href="#">Manage the Run Order of Record-Triggered Flows from Flow Trigger Explorer</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Relevant Flows from Flow Trigger Explorer		✓		
Access Flow Trigger Explorer from Object Manager		✓		
Navigate Flow Trigger Explorer with Keyboard Shortcuts		✓		
<b>Flow Debugging</b>				
Test One, Two, Three, Flow (Beta)		✓		
View All Data Permissions for Debugging Triggered Flows		✓		
<b>Flow Runtime</b>				
Two-Column Flow Layouts Are Superseded by Multicolumn Screens		✓		
Dependent Picklists Component Is Rebuilt Using Lightning Web Components (LWC)	✓			
Make Custom Screen Components React to Other Components on the Same Flow Screen (Pilot)				✓
Flow and Process Run-Time Changes in API Version 55.0		✓		
<b>Flow Management</b>				
Convert Workflow Rules to Flows with the Migrate to Flow Tool (Generally Available)		✓		
Delete Flow and Process Versions from Managed Packages		✓		
<b>Flow Extensions</b>				
Send Screen Flows to Slack with an Invocable Action (Beta)			✓	
Send Notifications to Slack with an Invocable Action			✓	
<b>Flow and Process Release Updates</b>				
Accurately Measure the CPU Time Consumption of Flows and Processes (Release Update)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)</a>			✓	
<a href="#">Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)</a>			✓	
<a href="#">Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Release Update)</a>			✓	
<a href="#">Run Flows in User Context via REST API (Release Update)</a>			✓	
<b>Flow Orchestration</b>				
<a href="#">Open Associated Flows from an Orchestration</a>		✓		
<a href="#">See New Milestones in Orchestration History</a>		✓		
<a href="#">Wake Up Paused Orchestration</a>		✓		
<a href="#">Order Triggered Orchestration with Flow Trigger Explorer</a>		✓		
<a href="#">Deploy Orchestration with Change Sets</a>		✓		
<a href="#">Use Improved Orchestrator List Views</a>		✓		
<b>Einstein Next Best Action</b>				
<a href="#">Limit How Often a Recommendation or Offer Appears</a>		✓		

## 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
<a href="#">Track, Follow, and Monitor the Latest Changes that Vendors Make to their Systems with Dynamic Integration Data Mapping</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Personalize Health Verification Emails with Email Mappings</a>	✓			
<a href="#">Add a Wellness Questionnaire to your Health Verification Strategy</a>	✓			
<a href="#">Manage and Run Multiple Health Verification Configurations Under One Org</a>	✓			
<a href="#">Purge Health Cards and Health Card-Related Data from Your Safety Cloud System</a>	✓			
<a href="#">Provide Automated Health Verification for SMART Health Cardholders</a>	✓			
<a href="#">Provide Point-of-Entry Health Verification for users with SMART Health Cards</a>			✓	
<a href="#">Access the Most Up-to-Date List of SMART Health Card Issuers from the VCI™ Directory</a>			✓	

## Security, Identity, and Privacy

Enhanced domains now work with sandboxes, offer redirects, and lend more secure login options. You can now log in with your Microsoft credentials, access and maintain consumer keys and consumer secrets more securely, and streamline your transition to using multi-factor authentication. Gather preference information consistently with reusable templates in Privacy Center. Salesforce Shield offers encryption and event tracking for more data and control over Transaction Security metering behavior. Use Security Center to create security-centric reports, and define security policies for all connected tenants (generally available). Private Connect support for AWS integrations is available in the EMEA and APAC regions. And remember to prepare inbound and outbound connections for the Private Connect network upgrade.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Backup and Restore</b>				
<a href="#">Restore Data Using Date Ranges</a>			✓	
<b>Domains</b>				
<a href="#">Enable Enhanced Domains (Release Update)</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Use Enhanced Domains in New and Refreshed Sandboxes</a>		✓		
<a href="#">Redirect Your Site URLs After You Enable Enhanced Domains</a>		✓		
<a href="#">Prepare for Partitioned Domains</a>		✓		
<a href="#">Test Your Custom Domain That Uses a Third-Party CDN in a Sandbox</a>		✓		
<a href="#">Enable the Salesforce CDN Partner in a Sandbox Custom Domain</a>		✓		
<a href="#">Improve Code Security with My Domain Logins</a>		✓		
<a href="#">Wait 15 Minutes Between Domain Changes</a>		✓		
<a href="#">Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs</a>			✓	
<a href="#">Other My Domain Changes</a>		✓		
<b>Identity and Access Management</b>				
<b>Get Ready for Multi-Factor Authentication Auto-Enablement and Enforcement</b>				
<a href="#">Enable Multi-Factor Authentication for Your Entire Org</a>		✓		
<a href="#">Exclude Exempt Users from Future MFA Auto-Enablement and Enforcement</a>		✓		
<a href="#">Verify User Identity with WebAuthn (FIDO2) Security Keys</a>	✓			
<a href="#">Bypass MFA Challenges for Single Sign-On Auth Provider Logins (Release Update)</a>			✓	
<a href="#">Securely Update Email Addresses and Reset Passwords (Release Update)</a>			✓	
<a href="#">Login Enhancements for Microsoft</a>			✓	
<a href="#">Rotate the Consumer Key and Consumer Secret of a Connected App</a>			✓	
<a href="#">Verify Your Identity to Access Consumer Key and Consumer Secret</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Block the OAuth 2.0 Username-Password Flow at an Org-Wide Level</b>			✓	
<b>Upgrade SAML Single Sign-On Framework (Release Update)</b>			✓	
<b>Privacy Center</b>				
<b>Consent Templates (Beta)</b>		✓		
<b>Salesforce Shield</b>				
<b>Event Monitoring</b>				
Control Transaction Security Metering Behavior			✓	
Monitor Critical User Permissions (Generally Available)		✓		
Track API Usage for API Versions 31–49		✓		
Get More Information About Your Platform API Requests		✓		
Get More Complete EPT Metrics for Your Lightning Pages			✓	
See Enhanced Transaction Security Policy Execution Details			✓	
Append Data to Event Monitoring Analytics App Datasets (Beta)			✓	
<b>Field Audit Trail</b>				
Updated Data Retention Limit for Field Audit Trail		✓		
<b>Shield Platform Encryption</b>				
Encrypt Participant Display Names in Service Cloud Voice			✓	
<b>Security Center</b>				
<b>Deploy New Policy Types from Security Policies (Generally Available)</b>		✓		
<b>Get More Custom Report Types</b>		✓		
<b>See More Metrics in Security Center</b>		✓		



Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Export Security Center Data with the Click of a Button</a>		✓		
<b>Other Changes</b>				
<a href="#">Validate Your Redirects</a>		✓		
<a href="#">Define CSP Trusted Sites for Visualforce Pages</a>		✓		
<a href="#">Allow Redirects Only to Trusted External URLs</a>		✓		
<a href="#">Protect Your Visualforce Pages with Cross-Origin Headers</a>		✓		
<a href="#">Secure Cross-Cloud Integrations with Private Connect Across the Globe</a>			✓	
<a href="#">Private Connect Legacy Network Is Being Retired</a>			✓	
<a href="#">CSP Trusted Sites LEX Context Option Was Renamed</a>		✓		

## Service

Take advantage of new Service Cloud features that help you and your team deliver smart, swift service. Give customers a personalized experience on your mobile app or website with Messaging for In-App and Web (generally available). Monitor disruptions in more places with third-party integrations for Incident Management. Break down team silos and speed up time to resolution with swarming on incidents, problems, and change requests in Slack. Voice call transfer enhancements and agent flags and whispers provide control and flexibility. Get Einstein Reply Recommendations in up to 16 languages, and add Einstein Article Recommendations and Case Classification to existing flows. And in Workforce Engagement, the new Intraday Management dashboard helps supervisors identify and resolve unexpected staffing gaps and schedule adherence discrepancies.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<b>Case Management</b>				
<b>Entitlements and Milestones</b>				
<a href="#">Get the Improved Entitlements and Milestones Experience</a>				
<b>Channels</b>				
<b>Messaging</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add Flexibility and Power with Messaging for In-App and Web (Generally Available)			✓	
Start with the Messaging for In-App and Web Learning Map			✓	
Customize Your Mobile App Messaging Experience	✓			
Connect Messaging for Web to an Experience Site (Generally Available)			✓	
Add an Enhanced Bot to Messaging for In-App and Web				
Move a WhatsApp Number to Salesforce Messaging				✓
Make Sure Agents Don't Miss Incoming Messages with an Orange Tab	✓			
Learn About Pricing Changes for WhatsApp Messaging Channels	✓			
Stay on Track with the Messaging Learning Map	✓			
<b>Voice</b>				
Transfer Calls More Efficiently	✓			
Manage Caller Escalations with Supervisor Barge-In	✓			
Assist Agents in Real Time with Agent Flags	✓			
Use Service Cloud Voice with an Existing Amazon Connect Instance	✓			
Improve Transcriptions with Contact Lens for Amazon Connect (Generally Available)		✓		
Make More Calls with Service Cloud Voice	✓			
Minimize Disruptions with Improved Presence Status Syncing for Voice Calls	✓			
Reinforce Customer Trust with Service Cloud Voice HIPAA Compliance Offerings	✓			
Make and Answer Voice Calls from a Virtual Desktop	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Refresh or Create a Sandbox Org and Link it to an Amazon Connect Instance</a>	✓			
<a href="#">Keep Your Contact Center Secure with Amazon's Virtual Private Cloud</a>	✓			
<a href="#">Update Your Contact Center to Access Universal Call Recording</a>	✓			
<a href="#">Give Your Developers the Latest Service Cloud Voice Features</a>	✓			
<b>Routing</b>				
<a href="#">Raise Flags and Whisper in More Channels</a>	✓			
<a href="#">Make Smarter Routing Decisions by Checking Agent Availability</a>	✓			
<a href="#">Customize the Agent Experience with Omni-Channel Alert Sounds</a>			✓	
<a href="#">Control Routing with Refined Auto Accept</a>			✓	
<a href="#">Connect Your Customers to a Bot with Omni-Channel Flow (Generally Available)</a>		✓		
<b>Einstein for Service</b>				
<a href="#">Train Your Reply Recommendations Model in 16 More Languages (Generally Available)</a>			✓	
<a href="#">Deflect Cases with Einstein Article Recommendations for Flows (Generally Available)</a>			✓	
<a href="#">Automate Case Triage with Einstein Case Classification for Flows (Generally Available)</a>			✓	
<a href="#">Save Agents Time with Einstein Article Recommendations for Conversations (Pilot)</a>			✓	
<b>Einstein Bots</b>				
<a href="#">Create and Share Your Own Bot Templates (Beta)</a>		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Upgrade Your Conversational Experiences with Enhanced Bots (Generally Available)</a>				✓
<a href="#">Preview Your Bot with Text Preview (Beta)</a>		✓		
<a href="#">Connect to Your Channels Faster with the Upgraded Einstein Bots API and the Java SDK (Beta)</a>		✓		
<a href="#">Search Less and Build More with Conversation Canvas</a>		✓		
<a href="#">View Savings at a Glance with the Einstein Bots Value Dashboard</a>			✓	
<a href="#">Analyze Bot Performance with New Standard Reports</a>		✓		
<b>Workforce Engagement</b>				
<a href="#">Monitor Agents' Daily Activity and Mitigate Staffing Gaps with Intraday Management</a>	✓			
<a href="#">Notify Agents of Changes to Shifts with Intraday Management</a>	✓			
<a href="#">Assign Specific Activities During a Shift with Shift Segments</a>	✓			
<a href="#">Let Agents View Shift Segments and Accept or Decline Shifts in Agent Home</a>	✓			
<a href="#">The Workforce Engagement Planner Permission Set Now Includes Shift Segments</a>	✓			
<a href="#">Omni-Channel Plan Is Now Called Capacity Plan</a>	✓			
<b>Incident Management</b>				
<a href="#">Resolve Incidents Across Teams with Swarming in Slack</a>			✓	
<a href="#">Save Time with Automated Incident Management Workflows</a>			✓	
<a href="#">Monitor Disruptions with Incident Management Integrations</a>			✓	
<a href="#">Get Incident Management Insights</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get the Enhanced Incident Management Experience</a>			✓	
<b>Other Changes</b>				
<a href="#">Disable Ref ID and Transition to New Email Threading Behavior (Release Update)</a>			✓	
<a href="#">Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)</a>	✓			

## Supported Browsers

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

### IN THIS SECTION:

#### [Supported Browsers and Devices for Lightning Experience](#)

See the supported browsers and devices for Lightning Experience.

#### [Ensure IE11 Lightning Experience Users Can't Access Salesforce Classic](#)

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

#### [Supported Browsers and Devices for Salesforce Classic](#)

See the supported browsers and devices for Salesforce Classic.

#### [Supported Browsers for CRM Analytics](#)

Supported browsers for CRM Analytics include those supported for Lightning Experience with the following differences: CRM Analytics 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.

-  **Important:** As of December 31, 2020, when using Lightning Experience in 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.
-  **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. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Experience Builder sites	Not supported	Not supported	Supports latest stable browser version. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Special setup considerations?	Not supported	Not supported	No	No	No	No
Limitations?	Yes	Yes	Yes	No	Yes	Yes

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

## 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.

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

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

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

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

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


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

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

## Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

**Where:** Salesforce Classic is available in all editions.

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

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

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
Salesforce Classic	IE 11 no longer supported after December 31, 2022	Not supported	Supports latest stable browser version. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Salesforce Classic Console	IE 11 no longer supported after December 31, 2022	Not supported	Supports latest stable browser version. Internet Explorer mode for Microsoft Edge Chromium isn't supported.	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 CRM Analytics

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

## Salesforce Overall

Update primary billing contact information directly in the Your Account app. With matrix questions in Salesforce Feedback Management, create shorter surveys and help participants complete surveys faster. In Salesforce Scheduler, share service resource availability using Appointment Invitation URL and check out two new flows. Explore many enhancements to Search and much more in Summer '22.

### IN THIS SECTION:

#### General Enhancements

Keep working with tab-focused dialogs. Allow data analysis with Einstein Data Exploration Consent.

#### User Engagement

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



### [Your Account App](#)

When your primary billing contact changes, you can update the information directly in the app. We removed an option in the Business Type field.

### [Salesforce Feedback Management](#)

Create shorter and more effective surveys with matrix questions. Promote your company's brand identity by adding your logo to surveys. Customize your surveys' Thank You page message based on your participants' responses. Engage participants by including company-related web pages on the Thank You page. Get insights into the sentiment of survey responses and provide actionable insights to agents to address it.

### [Salesforce Scheduler](#)

Navigate and manage shifts quickly with Schedule view. Create and send appointment invitation URLs to users for faster appointment booking. Share an appointment booking with the assigned service resource automatically. Create a single event with all the attendees. Explore many other enhancements in Salesforce Scheduler.

### [Salesforce Overall Einstein](#)

Check out how Einstein Data Exploration Consent can help you work smarter. Einstein Search has been enhanced.

### [Salesforce Data Pipelines](#)

Pull data from Tableau Online, customize local Salesforce column data, and connect more securely using OAuth 2.0 with Snowflake and Hubspot.

## General Enhancements

Keep working with tab-focused dialogs. Allow data analysis with Einstein Data Exploration Consent.

### IN THIS SECTION:

#### [MFA Requirement Is in Effect and Enforcement Is Coming](#)

The requirement to use multi-factor authentication (MFA) when accessing Salesforce products went into effect on February 1, 2022. All users are now required to use MFA when they log in to your Salesforce org, whether they're logging in directly with a username and password or using SSO. If you haven't finished rolling out MFA, your users can continue logging in as they do today. But keep in mind that Salesforce is automatically enabling and enforcing MFA in the future. To avoid disruptions to your business when these milestones go into effect, and to protect your valuable data, we strongly recommend enabling MFA yourself as soon as possible.

#### [Updated Field History Data Retention Enforcement Period](#)

When Field Audit Trail is enabled, Field History Tracking no longer enforces the 18-month retention limit. Field history data is retained and not automatically deleted after Field Audit Trail is enabled. As always, you can delete data manually using the Apex or SOAP delete() method. Without Field Audit Trail enabled, Salesforce deletes field history data after 24 months.

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

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.

#### [Create Custom Address Fields \(Beta\)](#)

To improve address data accuracy and your users' experience, create custom fields that mimic the behavior of standard address fields.

## MFA Requirement Is in Effect and Enforcement Is Coming


The requirement to use multi-factor authentication (MFA) when accessing Salesforce products went into effect on February 1, 2022. All users are now required to use MFA when they log in to your Salesforce org, whether they're logging in directly with a username and password or using SSO. If you haven't finished rolling out MFA, your users can continue logging in as they do today. But keep in mind that Salesforce is automatically enabling and enforcing MFA in the future. To avoid disruptions to your business when these milestones go into effect, and to protect your valuable data, we strongly recommend enabling MFA yourself as soon as possible.

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

**When:** As of February 1, 2022, Salesforce customers are contractually required to use MFA when accessing Salesforce products, per the [Salesforce Trust and Compliance Documentation](#). In the future, Salesforce is automatically enabling and enforcing MFA for all orgs. To monitor the projected dates for the auto-enablement and enforcement milestones, see the [MFA Enforcement Roadmap](#).

**How:** To implement and roll out MFA on your own:

- 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](#).

 **Note:** If you use SSO to access your Salesforce org, we aren't enabling or enforcing MFA for your SSO identity provider. However, you are contractually required to implement MFA for all your users who access your org through SSO. To satisfy this requirement, you can use your SSO provider's MFA service

SEE ALSO:

[Get Ready for Multi-Factor Authentication Auto-Enablement and Enforcement](#)

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

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

[External Link: MFA for Salesforce Customer Site](#)

## Updated Field History Data Retention Enforcement Period

When Field Audit Trail is enabled, Field History Tracking no longer enforces the 18-month retention limit. Field history data is retained and not automatically deleted after Field Audit Trail is enabled. As always, you can delete data manually using the Apex or SOAP delete() method. Without Field Audit Trail enabled, Salesforce deletes field history data after 24 months.

**Where:** This change applies only to orgs created after June 1, 2011.

SEE ALSO:

[Salesforce Help: Field History Tracking](#)

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

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.


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

**When:** This update has been postponed indefinitely.

## Create Custom Address Fields (Beta)

To improve address data accuracy and your users’ experience, create custom fields that mimic the behavior of standard address fields.

**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](#).

SEE ALSO:

[Deliver to Your Customers with Custom Address Fields \(Beta\)](#)

## User Engagement

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

IN THIS SECTION:

[Explore Salesforce In-App Content](#)

Stay up to date on the new in-app prompts, welcome mats, and popovers that Salesforce creates. Leverage Salesforce content and minimize duplication as you create in-app content.

[Help More Users Succeed with Targeted Prompts](#)

More lower-level elements are now targetable using targeted prompts for In-App Guidance. You can now target elements such as Einstein Search, Help, Trailhead in the global header. Target action buttons in the Actions Ribbon on list views and record pages, or target elements in the Utility Bar.

[Sync Progress to Check Off Completed Items](#)

Check your guidance set progress and add check marks to completed Guidance Center for Admins items by clicking the sync progress button. Certain steps within the Guidance Center for Admins are tied to your Salesforce data. To see your current progress status, you must now click the new sync progress button. Salesforce then verifies whether the step was completed and adds a check mark to the item if so.

[Discover More Resources for the Guidance Center for Admins](#)

Find the very latest Trailhead badges, videos, and other resources for Trailblazer Community, Pardot Lightning, success plans, Manufacturing Cloud, and more. Learn how to sync your progress with guidance sets.

## Explore Salesforce In-App Content

Stay up to date on the new in-app prompts, welcome mats, and popovers that Salesforce creates. Leverage Salesforce content and minimize duplication as you create in-app content.

**Where:** This change applies to Lightning Experience. In-app content availability varies by feature.

**Why:** Salesforce added this in-app content.

Floating prompt	Reminds admins about important Nonprofit Cloud Power of Us deadlines.
Floating prompt	Encourages admins to set up Incident Management.

Floating prompt	Highlights tips and best practices for holiday and operating hour management to admins.
Docked prompt	Reminds admins that Your Account is available to use.
Docked prompt	Encourages admins to finish setting up Customer Data Platform.
Docked prompt	Encourages admins to discover building predictions with Einstein Prediction Builder.

## SEE ALSO:

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

## Help More Users Succeed with Targeted Prompts

More lower-level elements are now targetable using targeted prompts for In-App Guidance. You can now target elements such as Einstein Search, Help, Trailhead in the global header. Target action buttons in the Actions Ribbon on list views and record pages, or target elements in the Utility Bar.

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

**How:** To target a lower-level element, go to the In-App Guidance page in Setup, select targeted prompt, and choose the element you want.

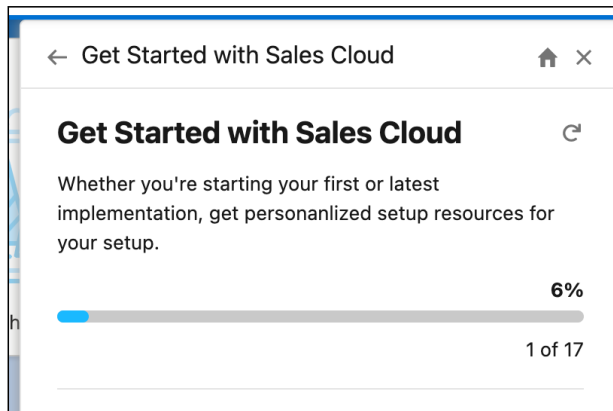
## SEE ALSO:

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

## Sync Progress to Check Off Completed Items

Check your guidance set progress and add check marks to completed Guidance Center for Admins items by clicking the sync progress button. Certain steps within the Guidance Center for Admins are tied to your Salesforce data. To see your current progress status, you must now click the new sync progress button. Salesforce then verifies whether the step was completed and adds a check mark to the item if so.

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



SEE ALSO:

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

## Discover More Resources for the Guidance Center for Admins

Find the very latest Trailhead badges, videos, and other resources for Trailblazer Community, Pardot Lightning, success plans, Manufacturing Cloud, and more. Learn how to sync your progress with guidance sets.

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

**Why:** To streamline and offer the latest information and guidance, new guidance sets were added and removed.

- Connect with Trailblazer Communities—Communities are a powerful tool for you to connect and learn from your peers. Explore these recommendations to start engaging with fellow admins.
- Get to Know Your Success Plan—Check out resources just for upgraded support experience subscribers.
- Get Started with Admissions Connect—Get to know Admissions Connect with all of the resources that you need to make the most of your admissions process.
- Get Started with Case Management—Case Management gives you a single view of your clients, services, and programs. Have all of the resources that you need to start your implementation and roll it out to your team.
- Get Started with Education Data Architecture—Explore essential resources to start your implementation and get up and running with Education Data Architecture (EDA).
- Get Started with Manufacturing Cloud—Review suggested learning resources for setting up sales agreements and forecasts, rebate management, and more.
- Get Started with Nonprofit Success Pack—Set up the Nonprofit Success Pack (NPSP) and solve for common nonprofit needs.
- Get Started with Program Management Module—Get to know Program Management Module (PMM) with all the resources that you need to start your implementation and roll it out to your team.
- Get Started with Student Success Hub for K-12—Get to know Student Success Hub (SSH), start setting it up, and learn the most important steps for optimizing SSH for your users.
- [Removed] Get More Value out of Salesforce—Achieve your goals with a comprehensive assessment and action plan, and make Salesforce work for you.
- Solve Business Challenges with AppExchange—The AppExchange is a powerful resource for finding the right solution for your business needs. To get started, explore these free customer-favorite apps from Salesforce Labs.

- Upgrade to Pardot Lightning—With Pardot's Lightning app, your sales and marketing teams can operate side by side on one platform. Check out these recommendations for a quick and easy upgrade.

**How:** Access the Guidance Center for Admins 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 for Admins. 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 \(can be outdated or unavailable during release preview\)](#)

## Your Account App

When your primary billing contact changes, you can update the information directly in the app. We removed an option in the Business Type field.

IN THIS SECTION:

[Update Your Primary Billing Contact Any Time](#)

When your primary billing contact changes, you can now make that update in the Your Account app. There's no need to contact us.

[The Business to Government Business Type Was Removed](#)

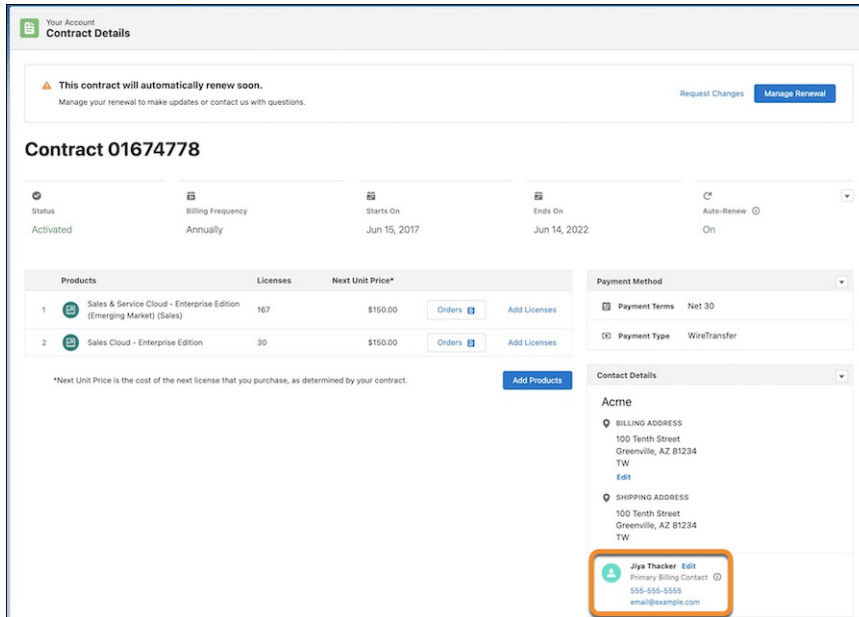
When you sign up for Your Account, the Business Type field now shows a single option, Business to Business. The Your Account app is for use by businesses providing products or services to other businesses. It displays the Business Type field when a locale requires value-added tax (VAT) information. Previously, the field included a Business to Government option, which is no longer supported.

## Update Your Primary Billing Contact Any Time

When your primary billing contact changes, you can now make that update in the Your Account app. There's no need to contact us.

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

**How:** On the Contract page, next to the primary billing contact's name, click **Edit**.



## The Business to Government Business Type Was Removed

When you sign up for Your Account, the Business Type field now shows a single option, Business to Business. The Your Account app is for use by businesses providing products or services to other businesses. It displays the Business Type field when a locale requires value-added tax (VAT) information. Previously, the field included a Business to Government option, which is no longer supported.

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

## Salesforce Feedback Management

Create shorter and more effective surveys with matrix questions. Promote your company's brand identity by adding your logo to surveys. Customize your surveys' Thank You page message based on your participants' responses. Engage participants by including company-related web pages on the Thank You page. Get insights into the sentiment of survey responses and provide actionable insights to agents to address it.

### IN THIS SECTION:

#### [Increase Survey Completion Rates with Matrix Questions](#)

Boost your survey completion rates by using matrix questions that allow participants to respond to multiple questions with the same set of choices. Create shorter surveys by grouping related questions and including one or more selection questions in a single matrix question. Participants can easily evaluate the common set of choices in a matrix question and complete surveys faster.

#### [Increase Brand Awareness by Including Your Logo on Surveys](#)

Add your company's logo to surveys to highlight your brand identity. Including your logo promotes brand loyalty, increases survey responses, and improves completion rates.

#### [Customize the Thank You Page Message](#)

Customize the message that participants see on their Thank You page. Write multiple custom messages in Survey Builder and define which message participants view based on their responses.

### [Extend and Grow Customer Engagement by Sharing Web Pages](#)

Keep your customers engaged after they respond to surveys by adding links to your company website, social media pages, or other web pages on the Thank You page. Allow satisfied customers to promote their experience on social media and attract new customers to your company. Add various company-specific URLs that automatically redirect survey participants to respective web pages, or add buttons that participants click to navigate to the URLs.

### [Get Qualitative Feedback on Text Responses with Sentiment Insights](#)

Provide actionable insights to your agents by analyzing participants' responses to text-based questions. Use Sentiment Insights to identify when participants' sentiment turns negative and enable agents with actionable insights.

### [Enhance Customer Experience Through Sentiment Insights](#)

Analyze customer feedback deeper and know the sentiment you create in customers with the new set of dashboards that support Sentiment Insights. You can get the overall sentiment of the customer, identify the topics and channels that create the most positive sentiment, and identify the customer lifecycle stages that need improvement.

## Increase Survey Completion Rates with Matrix Questions

Boost your survey completion rates by using matrix questions that allow participants to respond to multiple questions with the same set of choices. Create shorter surveys by grouping related questions and including one or more selection questions in a single matrix question. Participants can easily evaluate the common set of choices in a matrix question and complete surveys faster.

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

**Who:** The Matrix question type is available with Salesforce Feedback Management Starter and Growth licenses.

**How:** In the Survey Builder, click **Add Question**, and then select **Matrix**.

Rank the following delivery options from most important to least important.

Tick one option as per your choice.

	Extremely Important	Very Important	Somewhat Important	Not so Important	Not at all Important
Deliver products quickly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Less cost of delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deliver multiple products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friendly delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Previous Next

Powered by Salesforce Surveys

SEE ALSO:

[Salesforce Help: Survey Question Types](#) (can be outdated or unavailable during release preview)

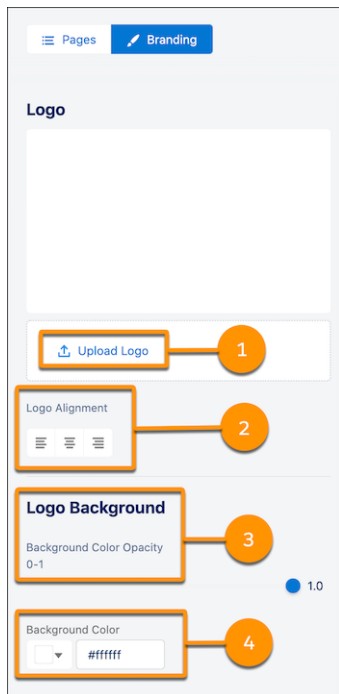


## Increase Brand Awareness by Including Your Logo on Surveys

Add your company's logo to surveys to highlight your brand identity. Including your logo promotes brand loyalty, increases survey responses, and improves completion rates.

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

**How:** In the Survey Builder, select the Branding tab, and scroll down to the Logo section.



To upload a file with the logo, click **Upload Logo** (1). You can specify the alignment (2), background color (3), and background color opacity (4) of the logo.

## Customize the Thank You Page Message

Customize the message that participants see on their Thank You page. Write multiple custom messages in Survey Builder and define which message participants view based on their responses.

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

**Who:** To customize Thank You page messages, users need the Salesforce Feedback Management Starter or Growth license.

**How:** In the Survey Builder, go to the Thank You page, and turn on Customize Page.

- To add a custom message, click **Add Custom Message** (1).
- To define when participants view the custom message, click **Display Logic** (2).
- To insert a response to a question or a merge field into the message, click **Insert Content** (3).

SEE ALSO:

[Salesforce Help: Customize the Thank You Message \(can be outdated or unavailable during release preview\)](#)

## Extend and Grow Customer Engagement by Sharing Web Pages

Keep your customers engaged after they respond to surveys by adding links to your company website, social media pages, or other web pages on the Thank You page. Allow satisfied customers to promote their experience on social media and attract new customers to your company. Add various company-specific URLs that automatically redirect survey participants to respective web pages, or add buttons that participants click to navigate to the URLs.

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

**Who:** To add URLs on the Thank You page, users need the Salesforce Feedback Management Starter or Growth license.

**How:** In the Survey Builder, go to the Thank You page and turn on Customize Page.

- To add company-specific URLs that automatically redirect the survey participants, click the URL dropdown and select **Redirect**.
- To add buttons that participants click to navigate to company-specific URLs, click the URL dropdown and select **Button**.

SEE ALSO:

[Salesforce Help: Link to Webpages from the Thank You Page \(can be outdated or unavailable during release preview\)](#)

## Get Qualitative Feedback on Text Responses with Sentiment Insights

Provide actionable insights to your agents by analyzing participants' responses to text-based questions. Use Sentiment Insights to identify when participants' sentiment turns negative and enable agents with actionable insights.

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

**When:** You can use Sentiment Insights with Feedback Management from July 19, 2022.

**Who:** To analyze the sentiment of survey responses, users need the Salesforce Feedback Management Starter or Growth license.

**How:** Configure a data map for the survey and use the Perform Survey Sentiment Analysis Flow action to process responses. You can also use the Perform Survey Sentiment Analysis Flow template or the Perform Survey Sentiment Analysis for User-Selected Question Flow template.

## Enhance Customer Experience Through Sentiment Insights

Analyze customer feedback deeper and know the sentiment you create in customers with the new set of dashboards that support Sentiment Insights. You can get the overall sentiment of the customer, identify the topics and channels that create the most positive sentiment, and identify the customer lifecycle stages that need improvement.

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

**When:** You can use Sentiment Insights with Feedback Management from July 19, 2022.

**Who:** To analyze the sentiment of survey responses, users need the Salesforce Feedback Management Starter or Growth license.

**How:** Go to CRM Analytics Studio and create your app by using the Customer Lifecycle Analytics template.

SEE ALSO:

[Salesforce Help: In-App Dashboards](#)

[Salesforce Help: Embedded Dashboards](#)

## Salesforce Scheduler

Navigate and manage shifts quickly with Schedule view. Create and send appointment invitation URLs to users for faster appointment booking. Share an appointment booking with the assigned service resource automatically. Create a single event with all the attendees. Explore many other enhancements in Salesforce Scheduler.

IN THIS SECTION:

[View Shifts Schedule in a Calendar Format](#)

Service resources and service territory managers can now switch to Schedule view to view their shifts, holidays, and absences in a calendar format. In schedule view, you can view shifts by resources or by work type groups. You can create, edit, or clone a shift, and control the time zone where the shifts are shown. By default, the Schedule view shows the shifts in the time zone of the logged-in user. You can also color-code shifts, show user profile photos for each resource, and control which fields to show in shift cards and resource cards.

[Share Service Resource Availability Using an Invitation URL](#)

Salesforce Scheduler has two new flows: Generate Appointment Invitation and Book Appointment from Invitation. Service resources can use the Generate Appointment Invitation flow to generate the invitation URL with their availability. They can restrict the period for which invitation URLs are available for appointment booking using URL expiration dates. Users can use the Book Appointment from Invitation flow to book appointments by using the invitation URL generated using the Generate Appointment Invitation flow. The invitation URLs direct users to the time slot page that shows the resource's availability so they can quickly book appointments. If invitation URL has an expiration date, users can book appointments using invitation URLs only before the expiration date.

[Share Appointments with Assigned Service Resources](#)

Share appointments with assigned service resources automatically by enabling the new Resource Appointment Sharing setting. When appointments are shared, service resources get appropriate permissions to manage their appointments themselves.

### Show Multiple Attendees Under a Single Event

Show multiple attendees under a single Salesforce calendar event using the Multiple Attendee Event setting. After you enable the setting, new and updated events show all attendees.

### Other Changes to Salesforce Scheduler

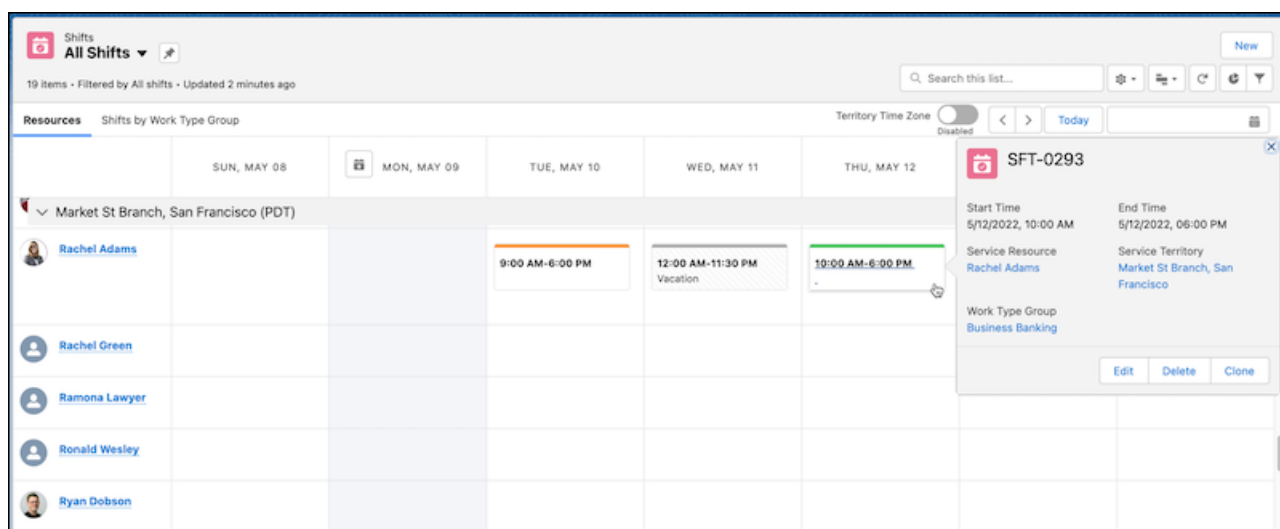
Learn about other important improvements to Salesforce Scheduler.

## View Shifts Schedule in a Calendar Format

Service resources and service territory managers can now switch to Schedule view to view their shifts, holidays, and absences in a calendar format. In schedule view, you can view shifts by resources or by work type groups. You can create, edit, or clone a shift, and control the time zone where the shifts are shown. By default, the Schedule view shows the shifts in the time zone of the logged-in user. You can also color-code shifts, show user profile photos for each resource, and control which fields to show in shift cards and resource cards.

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

**How:** In Shifts, navigate to a list view other than the Recently Viewed list view, such as the All Shifts list view or a custom list view and select it. To view shifts in the Schedule view, click  and select .



To view shifts in the time zone of the service territory instead of the time zone of the logged-in user, turn on the Territory Time Zone toggle.

## Share Service Resource Availability Using an Invitation URL

Salesforce Scheduler has two new flows: Generate Appointment Invitation and Book Appointment from Invitation. Service resources can use the Generate Appointment Invitation flow to generate the invitation URL with their availability. They can restrict the period for which invitation URLs are available for appointment booking using URL expiration dates. Users can use the Book Appointment from Invitation flow to book appointments by using the invitation URL generated using the Generate Appointment Invitation flow. The invitation URLs direct users to the time slot page that shows the resource's availability so they can quickly book appointments. If invitation URL has an expiration date, users can book appointments using invitation URLs only before the expiration date.

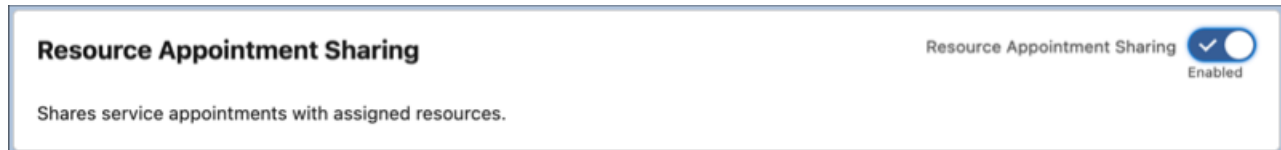
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Salesforce Scheduler enabled.

## Share Appointments with Assigned Service Resources

Share appointments with assigned service resources automatically by enabling the new Resource Appointment Sharing setting. When appointments are shared, service resources get appropriate permissions to manage their appointments themselves.

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

**How:** To start sharing appointments with the assigned service resources, on the Salesforce Scheduler Settings page, enable **Resource Appointment Sharing**.

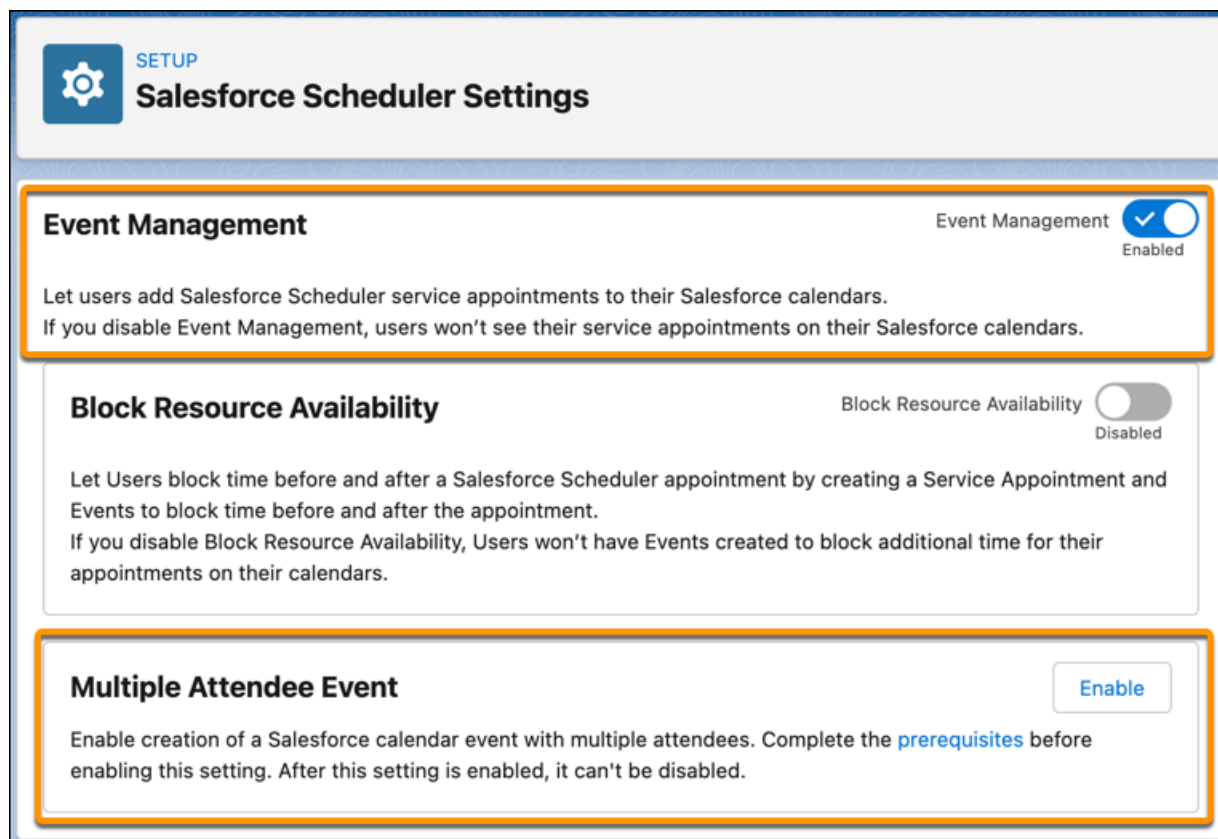


## Show Multiple Attendees Under a Single Event

Show multiple attendees under a single Salesforce calendar event using the Multiple Attendee Event setting. After you enable the setting, new and updated events show all attendees.

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

**How:** To start creating events with multiple attendees, on the Salesforce Scheduler Settings page, enable **Event Management**, and then **Multiple Attendee Event**. Before enabling this preference, make sure that you complete the prerequisites. After you enable this preference, you can't disable it.



The screenshot shows the 'Salesforce Scheduler Settings' page in the Salesforce Setup interface. The page has a light gray header with the 'SETUP' label and a gear icon. Below the header, there are three main settings sections, each with a title, a description, and a toggle switch. The 'Event Management' section is highlighted with an orange border and has its toggle switch turned on (blue). The 'Block Resource Availability' section has its toggle switch turned off (gray). The 'Multiple Attendee Event' section is also highlighted with an orange border and has an 'Enable' button. The descriptions for each section explain the functionality and the consequences of enabling or disabling the feature.

**Event Management** Event Management ☒ Enabled

Let users add Salesforce Scheduler service appointments to their Salesforce calendars.  
If you disable Event Management, users won't see their service appointments on their Salesforce calendars.

**Block Resource Availability** Block Resource Availability ☐ Disabled

Let Users block time before and after a Salesforce Scheduler appointment by creating a Service Appointment and Events to block time before and after the appointment.  
If you disable Block Resource Availability, Users won't have Events created to block additional time for their appointments on their calendars.

**Multiple Attendee Event** Enable

Enable creation of a Salesforce calendar event with multiple attendees. Complete the [prerequisites](#) before enabling this setting. After this setting is enabled, it can't be disabled.

## Other Changes to Salesforce Scheduler

Learn about other important improvements to Salesforce Scheduler.

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

### Service Resources Can Create Recurring Absences in Their Calendars

Service resources can now easily set recurring absences, such as daily or weekly, in their calendars.

### Hide Operating Hours on Service Territory Screen

Use the new Hide Operating Hours attribute in the Service Territory screen component to hide the operating hours of service territories.

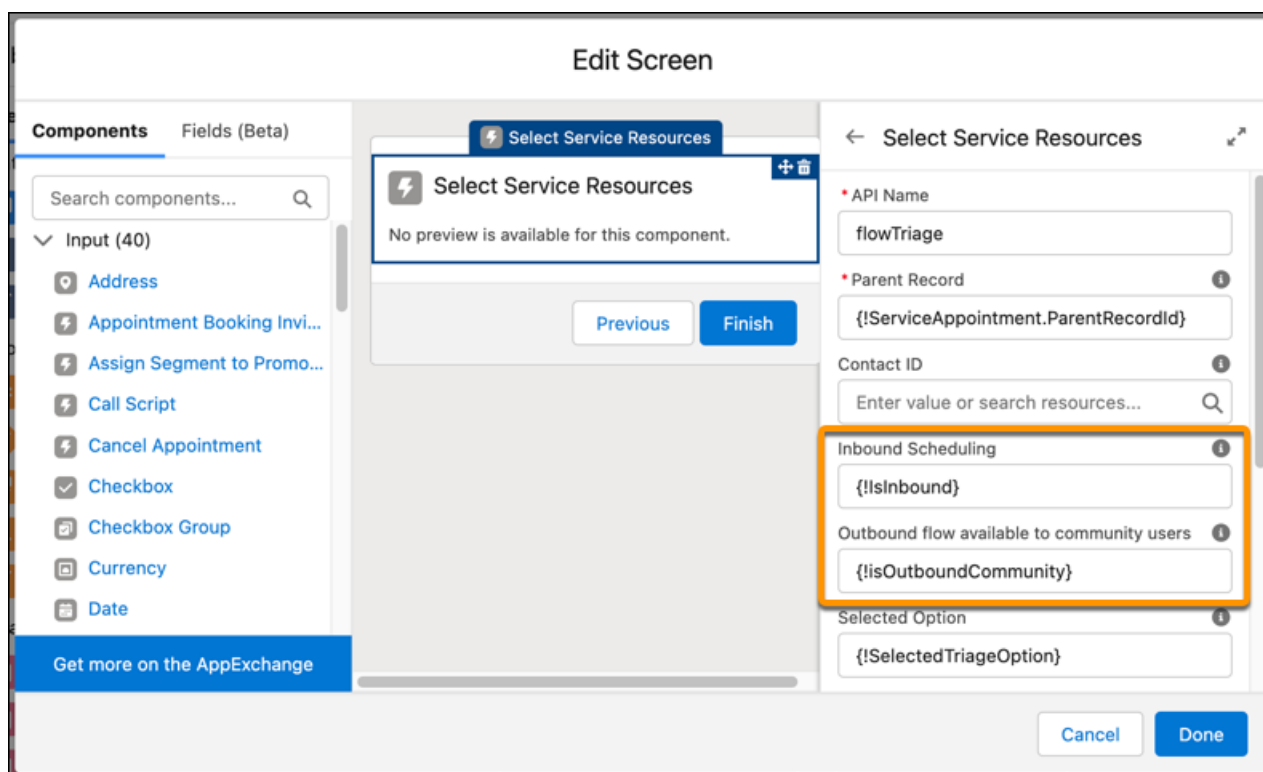


### Let Users Schedule Multi-Resource Appointments on the Go

For Multi-Resource Scheduling, adding multiple resources from the Select Service Appointment Time screen component is now mobile-compatible.

### Make Outbound Flow Available to Community Users

Use the new Outbound flow available to community users attribute in the Select Service Resources screen component to make an Inbound New Appointment flow available as an outbound flow to the community users. Set the `IsInbound` variable to `false` and the `isOutboundCommunity` variable to `true`. Independent contractors or their assistants can manage their appointments and absences in Experience Cloud. The outbound flow available to the community users is also mobile-compatible.



### Use an Approval Process to Manage Shifts

Service territory managers can create an approval process for the shifts related to their service territories. Using the approval process, they can define various email templates for each action related to shifts, such as shift creation, shift approval, and shift rejection.

## Salesforce Overall Einstein

Check out how Einstein Data Exploration Consent can help you work smarter. Einstein Search has been enhanced.

### IN THIS SECTION:

#### [Allow Data Analysis with Einstein Data Exploration Consent](#)

Work smarter with Einstein features when you permit Salesforce data scientists to explore and improve your data.

#### [Einstein Search](#)

Einstein Search now provides a more efficient search experience. Discover your users searchable objects and fields with Search Manager. Help users find the most relevant articles with Salesforce Knowledge. Users can get extracted text for their search questions using Einstein Search Answers. And users can quickly refine their searches by filtering out topics in Experience Cloud sites.

## Allow Data Analysis with Einstein Data Exploration Consent

Work smarter with Einstein features when you permit Salesforce data scientists to explore and improve your data.

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

**How:** From Setup, in the Quick Find box, enter *Einstein Data Exploration Consent*, and then select **Einstein Data Exploration Consent**. Edit the settings for the projects and objects that you want to grant access to.

### SEE ALSO:

[Einstein Release Notes](#)

[Salesforce Help: Allow Data Analysis with Einstein Data Exploration Consent \(can be outdated or unavailable during release preview\)](#)

## Einstein Search

Einstein Search now provides a more efficient search experience. Discover your users searchable objects and fields with Search Manager. Help users find the most relevant articles with Salesforce Knowledge. Users can get extracted text for their search questions using Einstein Search Answers. And users can quickly refine their searches by filtering out topics in Experience Cloud sites.

Rights of ALBERT EINSTEIN are used with permission of The Hebrew University of Jerusalem. Represented exclusively by Greenlight.

### IN THIS SECTION:

#### [Discover the Objects and Fields Available to Users with Search Manager](#)

Easily view all searchable objects and the search status of each field with Search Manager. Save time and narrow your search using filters so that you can verify whether a field is searchable.

#### [Manage Your Knowledge Article Base Using Natural Language Search](#)

Natural language search (NLS) makes article management effortless. NLS navigates your Salesforce Knowledge base and identifies your most common article scenarios. NLS recognizes what you're searching for as you filter articles by publication, status, creation date, or author. Specify what you're looking for in the search bar, and NLS returns a relevant list of articles that match your criteria.

#### [Receive Answers to Your Questions, Not Just Article Links, Using Einstein Search Answers \(Pilot\)](#)

Now you can solve your cases faster with more accurate answers delivered right to you. Reduce your search time by asking your question or entering a phrase in the global search bar. Einstein Search Answers instantly extracts the relevant text from your Salesforce Knowledge base articles to help answer your question.



### [Refine Knowledge Search Results with Topic Filters in Experience Cloud Sites](#)

Search faster and more effectively. Use multiple filters to get the best results from Einstein Search. To simplify results, enter all topics related to your search.

### [Search Layouts for Salesforce Classic Is Now List View Button Layout](#)

In Setup, the Search Layouts for Salesforce Classic page was renamed List View Button Layout.

### [Get Search Results for More Objects](#)

These objects are now searchable.

SEE ALSO:

[Einstein Release Notes](#)

## Discover the Objects and Fields Available to Users with Search Manager

Easily view all searchable objects and the search status of each field with Search Manager. Save time and narrow your search using filters so that you can verify whether a field is searchable.

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

**How:** Go to the new Search Manager page in Setup, and then navigate and search the list of objects and fields that are searchable by your users.

Objects	Fields
58 Items	30 Items - Sorted by Label
Quick Find	Quick Find
Account	Label ↑ Name ↓ Type ↓ Searchable
Application	Account MasterRecordId Lookup(Account)
Asset	Account ID Id Lookup()
Authorization Form	Account Name Name Name ✓
Authorization Form Consent	Account Owner OwnerId Lookup(User)
Authorization Form Data Use	Account Source AccountSource Picklist
Authorization Form Text	Annual Revenue AnnualRevenue Currency(18, 0)
Badge	Billing Address BillingAddress Address ✓
	Created By CreatedById Lookup(User)
	Created Date CreatedDate Date/Time
	Data.com Key Jigsaw Text(20)
	Deleted IsDeleted Checkbox

SEE ALSO:

[Salesforce Help: Use Search Manager to Find Your Searchable Objects and Fields \(can be outdated or unavailable during release preview\)](#)

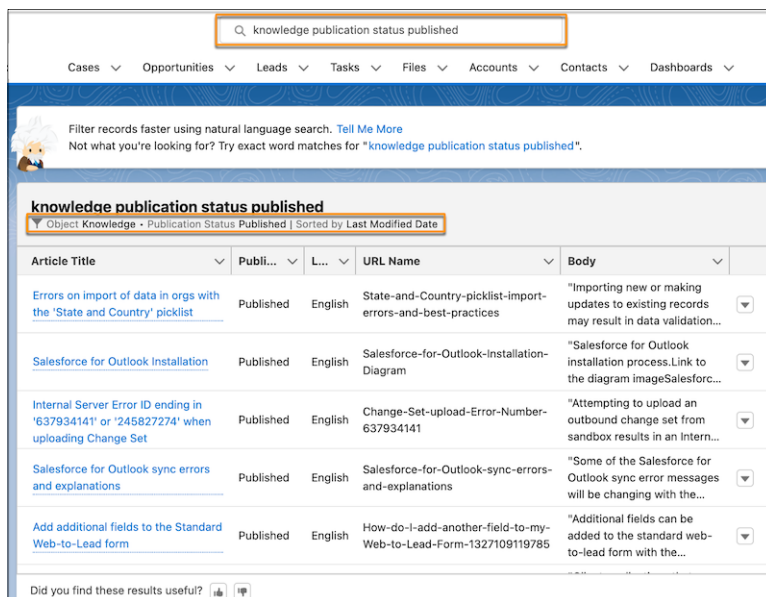
[Salesforce Help: Search Manager Limitations \(can be outdated or unavailable during release preview\)](#)

## Manage Your Knowledge Article Base Using Natural Language Search

Natural language search (NLS) makes article management effortless. NLS navigates your Salesforce Knowledge base and identifies your most common article scenarios. NLS recognizes what you're searching for as you filter articles by publication, status, creation date, or author. Specify what you're looking for in the search bar, and NLS returns a relevant list of articles that match your criteria.

**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions. Lightning Knowledge and Einstein Search for Knowledge must be enabled.

**How:** In the global search bar, enter queries such as *knowledge created today* or *knowledge publication status draft*.



SEE ALSO:

[Salesforce Help: Enable Einstein Search for Knowledge \(Pilot\)](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Einstein Search Limitations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Natural Language Search Limitations for Non-English Terms](#) (can be outdated or unavailable during release preview)

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

## Receive Answers to Your Questions, Not Just Article Links, Using Einstein Search Answers (Pilot)

Now you can solve your cases faster with more accurate answers delivered right to you. Reduce your search time by asking your question or entering a phrase in the global search bar. Einstein Search Answers instantly extracts the relevant text from your Salesforce Knowledge base articles to help answer your question.

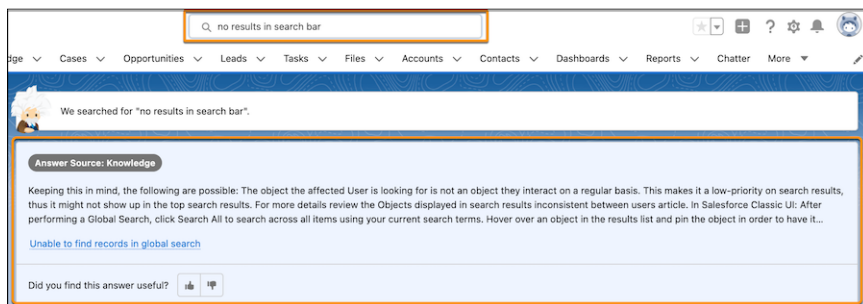
**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Essentials, Professional, Enterprise, Performance, and Unlimited editions with Lightning Knowledge enabled.



**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.

**Who:** This feature is for admins participating in the Einstein Search for Knowledge pilot. To participate in the pilot, customers using Lightning Knowledge can email [tryeinsteinsearch@salesforce.com](mailto:tryeinsteinsearch@salesforce.com).

**How:** In the global search bar, ask a question such as "How do I enroll in benefits?" Or enter a phrase such as "screen flickering," or "install printer."



SEE ALSO:

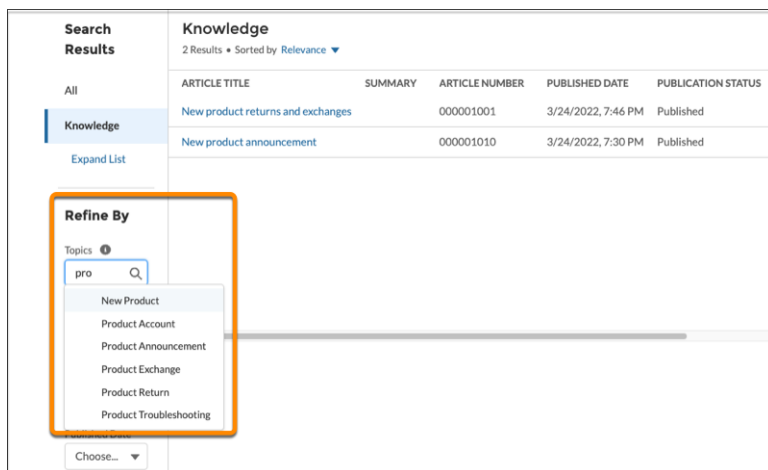
[Salesforce Help: Einstein Search for Knowledge \(Pilot\) \(can be outdated or unavailable during release preview\)](#)

## Refine Knowledge Search Results with Topic Filters in Experience Cloud Sites

Search faster and more effectively. Use multiple filters to get the best results from Einstein Search. To simplify results, enter all topics related to your search.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer Editions.

**How:** In Experience Builder, go to **Workspaces**, then **Administration**, and select **Preferences**. Turn on **Allow topic filtering for Lightning Knowledge search results** and save your changes.



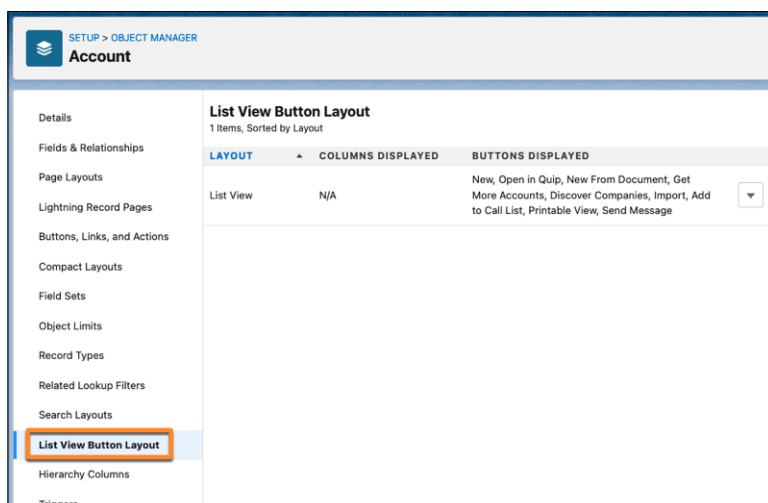
SEE ALSO:

[Salesforce Help: Search Behavior in Experience Cloud Sites \(can be outdated or unavailable during release preview\)](#)

## Search Layouts for Salesforce Classic Is Now List View Button Layout

In Setup, the Search Layouts for Salesforce Classic page was renamed List View Button Layout.

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



SEE ALSO:

[Salesforce Help: Customize Search Layouts to Show Results Users Want](#) (can be outdated or unavailable during release preview)

## 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
Action Visibility	Health Cloud
Activation Target Platform	MC Customer Data Platform (CDP)
Actv Tgt Platform Field Value	MC Customer Data Platform (CDP)
Ad Order Line Ad Target	Media Cloud
Ad Product Target Category	Media Cloud
Ad Quote Line Ad Target	Media Cloud
Ad Target Category	Media Cloud
Ad Target Category Segment	Media Cloud
Advanced Account Forecast Set Use	Manufacturing and Auto
Benefit Assignment	Public Sector
Billing Batch Scheduler	Scheduled Batch Payments
Care Fee Schedule Item	Health Cloud
Claim Team Member	Insurance
Clinical Detected Issue Detail	Health Cloud
Credit Memo Address Group	Subscription Management

Object	Product Area
Custom Object Participant	Financial Services Cloud
Financial Deal Asset	Financial Services Cloud
Financial Deal Bid	Financial Services Cloud
Goal Assignment	Public Sector
Health Score	Health Cloud
Health Score Action Log	Health Cloud
Loyalty Pgm Engmt Attr Prom	Loyalty Management Cloud
Loyalty Pgm Engmt Attribute	Loyalty Management Cloud
Loyalty Pgm Mbr Attribute Val	Loyalty Management Cloud
Medication Dispense	Health Cloud
Medication Statement Detail	Health Cloud
Mkt Data Transform	Marketing Cloud
Preventive Care Agreement	Health Cloud
Record Alert	Financial Services Cloud
Tag Category	Financial Services Cloud

**SEE ALSO:**

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

## Salesforce Data Pipelines

Pull data from Tableau Online, customize local Salesforce column data, and connect more securely using OAuth 2.0 with Snowflake and Hubspot.

**IN THIS SECTION:**

[Other Enhancements to Data Pipelines](#)

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

## 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.

### Use Improved Connectors

Use improved versions of the data sync connectors. To learn more, see [Adopt Improved CRM Analytics Connectors](#) on page 105.

**Customize Tableau Online Output Files**

Define the file name and columns of your Tableau Online Output. To learn more, see [Match the Tableau Online Output File to Your Business Requirements](#) on page 108.

**Connect More Securely to Tableau Online**

Connecting to the Tableau Online output connector is now more secure with Personal Access Tokens. To learn more, see [Connect More Securely to Tableau Online with Personal Access Tokens](#) on page 110.

**Connect More Securely to Snowflake and Hubspot**

Connecting to the Tableau Online output connector is now more secure with OAuth 2.0. To learn more, see [Connect More Securely to Snowflake and Hubspot with OAuth 2.0](#) on page 110.

**Configure Salesforce Field Metadata**

Customize your Salesforce field metadata in Data Manager. To learn more, see [Customize Local Salesforce Field Metadata](#) on page 111.

**Data Manager Is Streamlined**

Data Manager has a new look for improved visibility and navigation. To learn more, see [Check Your Data at a Glance in Data Manager \(Generally Available\)](#) on page 104.

**Pull In Tableau Online Data**

Connect to your Tableau Online workbooks without code using the new Tableau Online Connector. To learn more, see [Sync Data from Tableau Online](#) on page 112.

**Recipes Run Faster with Staged Data (Beta)**

Staged data reduces processing time when running multiple recipes sequentially. To learn more, see [Run Sequential Recipes Faster with Staged Data \(Beta\)](#) on page 113.

**Fiscal Configuration is Renamed Date Configurations**

Use multiple configurations and select the day that your week starts. To learn more, see [Data Prep Fiscal Configuration Is Now Called Date Configurations and Does More](#) on page 115.

**Combine Datasets with Cross Join (Generally Available)**

Use cross join to pair every row from one dataset with every row of another dataset. To learn more, see [Combine Unrelated Records with Cross Join \(Generally Available\)](#) on page 117.

**Recipes Now Support Multivalue Data**

Use multivalue functions in the formula transformation in Data Prep. To learn more, see [Use Multivalue Data in Your Recipes](#) on page 119.

**Improved Rounding**

Append now rounds more accurately. To learn more, see [Appends Round More Accurately](#) on page 120.

**Customize Your Data Preview Sampling**

For direct datasets, use new sampling options to control the rows seen in data preview. To learn more, see [Get a Clearer View of Your Data with Data Sampling](#) on page 121.

**Name Transformation Steps**

Name the steps in your Transform nodes to describe their purpose and find them using search. To learn more, see [Search for Transformation Steps by Name](#) on page 122.

**Relative Date Filtering**

Use relative dates in your recipe filters. To learn more, see [Refine Date Filtering Using Relative Dates](#) on page 123.

**Improved Search in Recipes**

Search now includes transformation steps and column names. To learn more, see [Find More in Your Recipe with Enhanced Global Search](#) on page 124.

**Delete Node Connections**

The connections between nodes can now be deleted. To learn more, see [Delete Node Connections](#) on page 125.

**Search Columns in Preview**

Quickly find columns using the new search in the columns tab. To learn more, see [Access Column Data in Preview](#) on page 125.

**Find More Values**

Search now shows all values, not just the ones included in the preview. To learn more, see [Search Your Columns for Any Value](#) on page 126.

**Automatically Add All**

Easily include all the columns in your input data with the new All Columns option. To learn more, see [Automate Adding All Columns to an Input Node](#) on page 127.

**Automatically Map All**

Quickly map all the columns when appending data together. To learn more, see [Automate Adding Columns to the Append Node](#) on page 128.

**Apply Formula Functions in Filters**

Add custom formula expressions directly in Filter nodes. To learn more, see [Simplify Column Operations with a Single Filter Node](#) on page 129.

## Analytics

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Sync data with improved connectors, get more customer insights with the Opportunity embedded dashboard, and make better business decisions when you use trending data to fine-tune predictions.

**IN THIS SECTION:**[Reports and Dashboards](#)

Create the right report with confidence with the enhanced report type selector. Find report types faster by filtering by Salesforce objects. Clean up data faster by editing multiple records inline on the report run page. For a unified analytics experience, access all your Lightning reports and dashboards from the new Analytics tab. Reduce processing time by limiting the number of rows returned in tabular reports. .

[CRM Analytics](#)

Manage templated apps in more ways with an enhanced app installer. Dive directly into Google BigQuery data outside of Salesforce. Find untapped insights in unstructured data with text clustering.

## Reports and Dashboards

Create the right report with confidence with the enhanced report type selector. Find report types faster by filtering by Salesforce objects. Clean up data faster by editing multiple records inline on the report run page. For a unified analytics experience, access all your Lightning reports and dashboards from the new Analytics tab. Reduce processing time by limiting the number of rows returned in tabular reports.

## IN THIS SECTION:

[Find the Best Report Type for New Reports \(Generally Available\)](#)

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 those you don't need. This feature is now generally available.

[Edit Multiple Fields on the Report Run Page \(Generally Available\)](#)

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. This feature is now generally available.

[Create Reports Based on Selected Salesforce Objects \(Beta\)](#)

It can be time-consuming and distracting to search through report types that you don't need. Now you can filter the report types list in the Create Report window to show only those report types that are based on your selected Salesforce objects.

[Summary Functions Now Include Median](#)

Report on the statistics that matter to your business. The median function is now available for all summary measures in reports and dashboards.

[Manage Your Reports and Dashboards in Analytics Home \(Beta\)](#)

Analytics Home is the new home base for your Lightning reports and dashboards. The Analytics Home is where all your Salesforce analytics content is organized in a cohesive and seamless experience. You get the benefit of a powerful search experience, better organization, and more.

[Limit Results in Tabular Reports](#)

To fast-track to the most relevant records and to avoid unnecessary processing time, you can limit the number of rows returned in a tabular report in report builder. When you set a row limit, you can include the report as the source for a dashboard table or chart component.

## SEE ALSO:

[Retrieve Accessible PDFs with the Analytics Download API](#)

## Find the Best Report Type for New Reports (Generally Available)

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 those you don't need. This feature is now generally available.

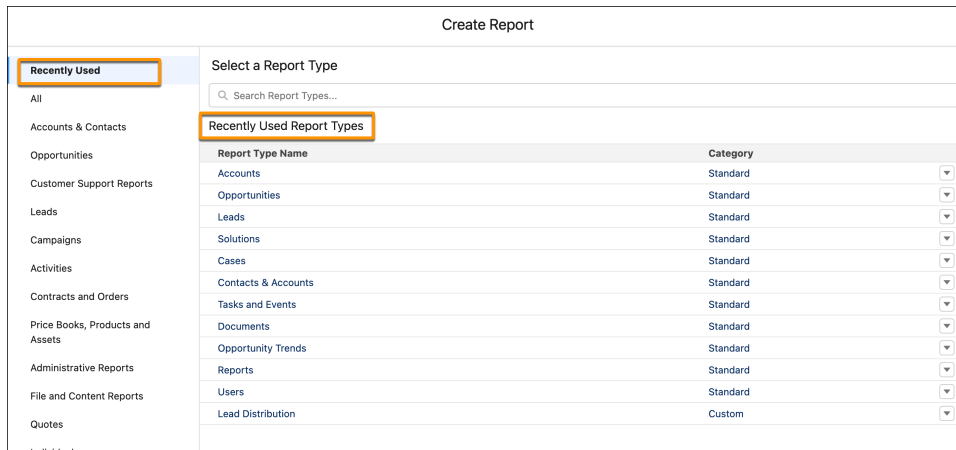
**Where:** This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** Start a new report on the Reports tab. In the Create Report window, you can still select report type categories on the left and search for report types by name in the search bar.

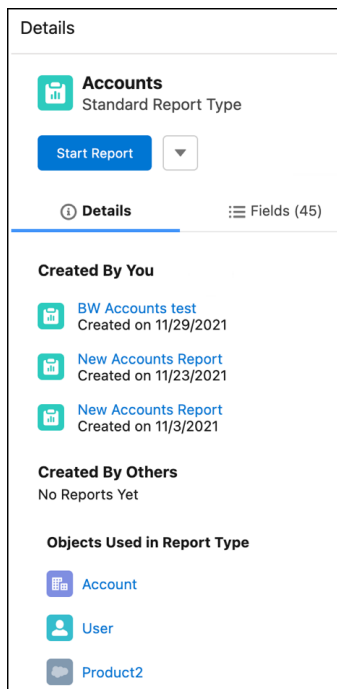
But now you can do more.

For example, to create a report that's similar to a recent one, scroll through the list of recently used report types to find the type that you used.





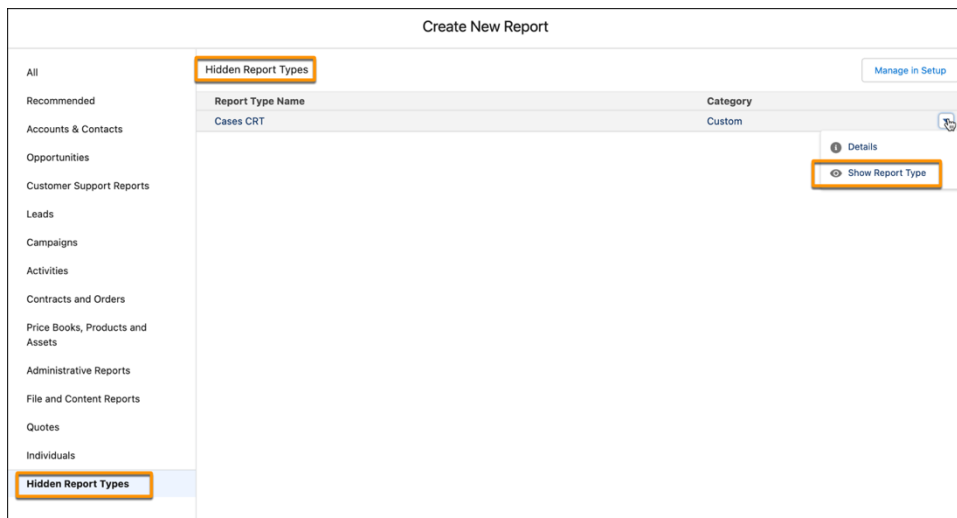
To display pertinent details about a report type, click it in the search results or in the Recently Used list.



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

To determine if a report type includes the fields that you need for your report, scroll or do a quick lookup in the Fields tab.

You can also hide report types from the details panel or report types list, just like you can in Salesforce Classic.



## Edit Multiple Fields on the Report Run Page (Generally Available)

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. This feature is now generally available.

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

**How:** On a report's run page, 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 other fields in the same row or a different row.

Stage	Employees	Probability
Closed Won	120	

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

Created Date	Next Step	Lead
1/6/2021	Need estimate	W
1/6/2021	Need estimate	To

To opt out of this feature, from Setup, in the Quick Find box, enter *Reports and Dashboards*, and then select **Reports and Dashboards Settings**. Uncheck **Enable Inline Editing in Reports (Lightning Experience only)**, and save your changes.

SEE ALSO:

[Salesforce Help: Update Multiple Fields Online on the Report Run Page in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Create Reports Based on Selected Salesforce Objects (Beta)

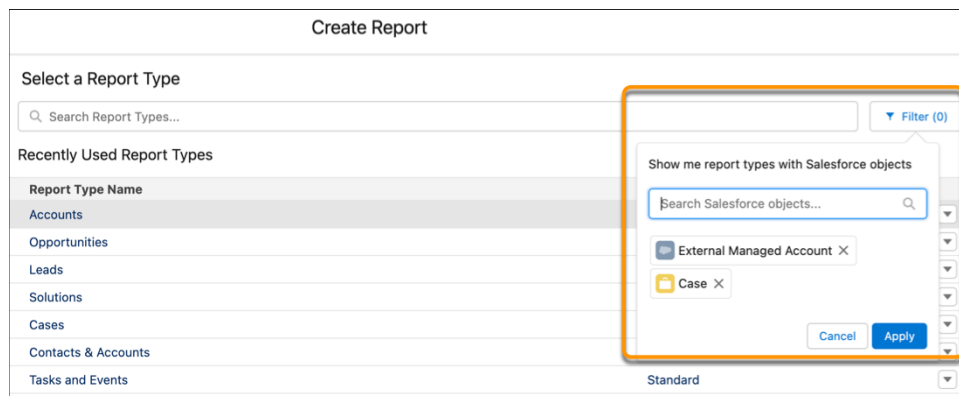
It can be time-consuming and distracting to search through report types that you don't need. Now you can filter the report types list in the Create Report window to show only those report types that are based on your selected Salesforce objects.

**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:** To enable this feature, contact Salesforce Support.

Start a new report on the Reports tab. In the Create Report window, click **Filter**. Search for and add one or more standard or custom Salesforce objects.



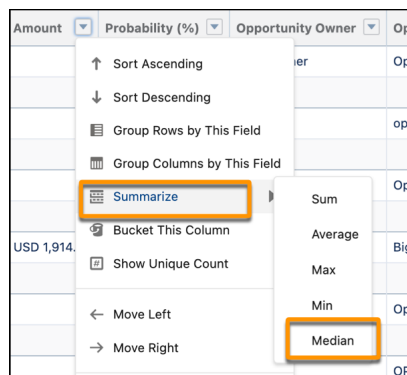
When you apply the changes, the list of report types is updated to show only the report types that are based on all the selected objects.

## Summary Functions Now Include Median

Report on the statistics that matter to your business. The median function is now available for all summary measures in reports and dashboards.

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


**How:** To show the available summary functions, select a summary action. Median is available in addition to sum, average, max, and min.



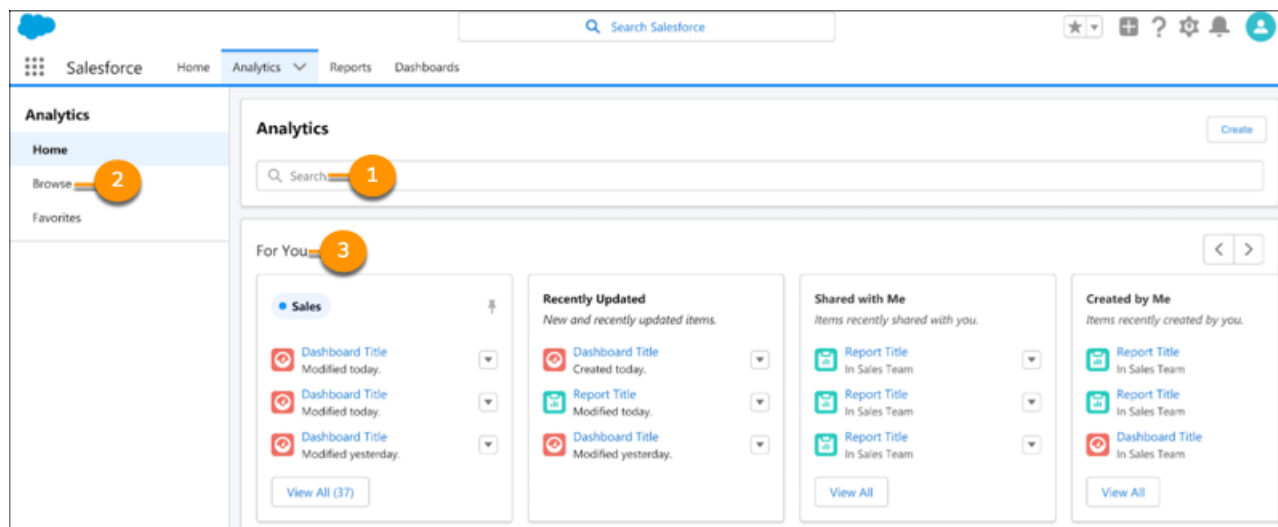
## Manage Your Reports and Dashboards in Analytics Home (Beta)

Analytics Home is the new home base for your Lightning reports and dashboards. The Analytics Home is where all your Salesforce analytics content is organized in a cohesive and seamless experience. You get the benefit of a powerful search experience, better organization, and more.

**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 then select **Reports and Dashboards Settings**. Select **Enable the Unified Experience for Analytics Home**. From the App Launcher, select **Analytics**. You can also get this feature by enabling it in Analytics settings. The feature is disabled when it's turned off in Analytics settings.




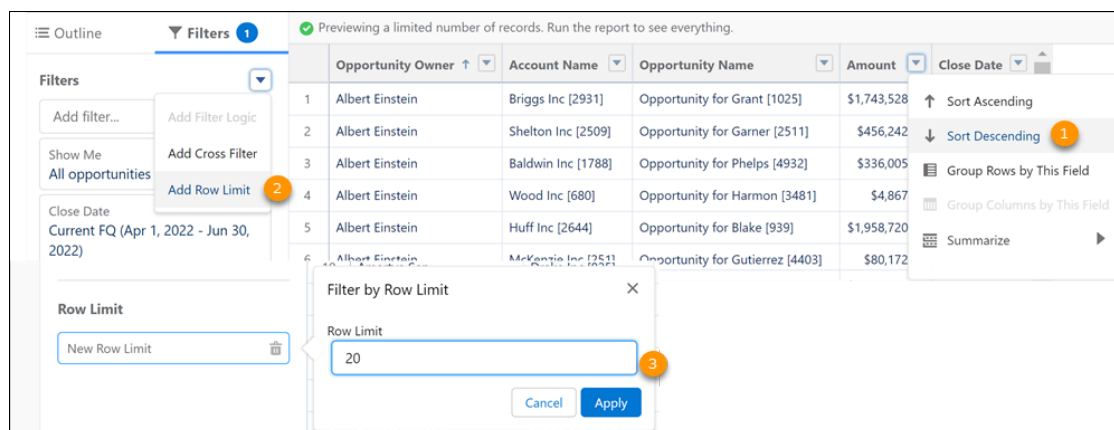
As you get started, you see that some areas of Home are familiar, such as the search bar (1) and left navigation (2). Analytics Home provides a personalized experience (3) that makes it easy to find and access relevant assets.

## Limit Results in Tabular Reports

To fast-track to the most relevant records and to avoid unnecessary processing time, you can limit the number of rows returned in a tabular report in report builder. When you set a row limit, you can include the report as the source for a dashboard table or chart component.

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

**How:** For example, to review the top 20 opportunities by amount, open the opportunities report in the report builder. Sort the Amount column in descending order (1). Then click  **Filters > Add Row Limit** (2). Set the row limit to 20, and click **Apply** (3). Save your changes and run the report.



## CRM Analytics

Manage templated apps in more ways with an enhanced app installer. Dive directly into Google BigQuery data outside of Salesforce. Find untapped insights in unstructured data with text clustering.

### IN THIS SECTION:

#### [Say Hello to CRM Analytics, New Name, Same Reliable Experience](#)

Tableau CRM is now known as CRM Analytics. The new name reflects our mission and vision for innovation on the native Salesforce platform. CRM Analytics continues to deliver an intelligent experience that's built on the world's #1 CRM, whether you're new to the platform or a pro. As we work to update the name everywhere, you can expect to see the previous name in a few places until we replace it.

#### [Analytics Data Integration](#)

Use improved connectors to sync data to CRM Analytics, integrate data into your online processes with more intuitive names, and keep your online data secure with personal access tokens.

#### [Analytics Prebuilt Apps](#)

Monitor and troubleshoot templated app creation with the enhanced app installer and customizable log levels. Try the updated Customer Insights Opportunity embedded dashboard, which makes it a snap to get details about your opportunities whenever you need them. In addition, Customer Insights supports Person accounts. Lastly, you can track revenue, pipeline, leads, activities and top accounts in the new Customer Insights Sales dashboard.

#### [Analytics App Building](#)

Explore and analyze Google BigQuery data without bringing it into Salesforce. Give dashboard users customized information when dynamic data doesn't show results. Filter Salesforce object and CDP data in dashboards more efficiently with global filters.

#### [Einstein Discovery](#)

Reveal untapped insights from your unstructured data with text clustering. Fine-tune prediction accuracy with trending data. Handle missing values in your datasets.

#### [Analytics for Everyone](#)

Bring data to every conversation with the CRM Analytics app for Slack. Enter questions in the CRM Analytics Home search bar, and Ask Data for Salesforce provides visualizations, metrics, smart recommendations, and next-best insight suggestions. Access your CRM Analytics assets and Lightning reports and dashboards together in the unified Analytics Home (beta).

### [Analytics Mobile Apps](#)

Easily read table data with text wrapping within tables, and repeater widgets are now on mobile. Get these and other enhancements when you upgrade to version 15.1 of CRM Analytics for iOS and Android.

## Say Hello to CRM Analytics, New Name, Same Reliable Experience

Tableau CRM is now known as CRM Analytics. The new name reflects our mission and vision for innovation on the native Salesforce platform. CRM Analytics continues to deliver an intelligent experience that's built on the world's #1 CRM, whether you're new to the platform or a pro. As we work to update the name everywhere, you can expect to see the previous name in a few places until we replace it.

**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.

## Analytics Data Integration

Use improved connectors to sync data to CRM Analytics, integrate data into your online processes with more intuitive names, and keep your online data secure with personal access tokens.

### IN THIS SECTION:

#### [Check Your Data at a Glance in Data Manager \(Generally Available\)](#)

Data Manager has a brand new look. The streamlined Connections view in Data Manager shows connections in a column list. See details when you click a connection. Get improved visibility into your usage and limits in the new Usage view. The new Data Manager is now generally available.

#### [Adopt Improved CRM Analytics Connectors](#)

It's time to make the switch. The remote connectors that you use to sync data to CRM Analytics 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 CRM Analytics after August 1, 2021, and all government cloud customers, only use the new connector versions.

#### [Match the Tableau Online Output File to Your Business Requirements](#)

Make integrating output data into your Tableau Online processes more intuitive by customizing the Tableau Online Output connector file name and columns. You can now specify the name of the .hyper file, which ends with .hyper instead of .hyper.hyper. And your exported file uses column names instead of API names.

#### [Connect More Securely to Tableau Online with Personal Access Tokens](#)

You can now use Tableau Online Personal Access Tokens to connect with CRM Analytics when using the Tableau Online output connector. A Personal Access Token is more secure than username and password authentication, better for auditing and tracking, and improves automation management. With the February 1, 2022 MFA requirement for Tableau Online, connections using username and password authentication aren't compliant and must be updated to a system such as Personal Access Tokens.

#### [Connect More Securely to Snowflake and Hubspot with OAuth 2.0](#)

Syncing your data from Snowflake and Hubspot to CRM Analytics is even more secure with the option to use OAuth 2.0 authentication. With OAuth 2.0 authentication, you don't share or store user login credentials.

#### [Customize Local Salesforce Field Metadata](#)

You can now configure the field metadata for local Salesforce data synced to CRM Analytics from Data Manager. From the Connect page, change properties such as field type, precision, date format, or default value. For example, update a text long field from 32,758 characters to the CRM Analytics-supported 32,000 characters so that it can sync successfully.

### [Sync Data from Tableau Online](#)

Pull your workbook-embedded data sources from Tableau Online into Data Manager without code by using the Tableau Online connector for CRM Analytics. For example, bring your on-prem shipping data to Salesforce for analysis and integration using Tableau Bridge, Tableau Online, and the CRM Analytics Tableau Online connector.

### [Run Sequential Recipes Faster with Staged Data \(Beta\)](#)

Staged data is an alternative to datasets that reduces processing time when your data strategy involves multiple recipes. A precursor recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, instead of merging account and opportunity data in each region-specific forecasting recipe, simply merge one time, output as staged data, and use this data in the other recipes.

### [Convert Dataflows to Recipes \(Beta\)](#)

Turn dataflows into recipes with a click of a button. Upgrade your old dataflows to recipes to use the latest Data Prep features such as joins, aggregates, sentiment detection, and more within an improved user experience. With the new Convert to Recipe (Beta) option, you can create recipes from dataflows. Your original dataflows are untouched when new recipes are generated.

### [Get Started Faster with Data Templates \(Beta\)](#)

Data templates are prepackaged data manipulation processes ready to be deployed in a matter of clicks. They include the data connectors, data prep recipes, and queries for common data use cases so you can focus your attention on the results rather than the process. The template configuration wizard walks you through customizing the data use case.

### [Data Prep Fiscal Configuration Is Now Called Date Configurations and Does More](#)

Data Prep Fiscal Configuration now does so much more for your date handling that we've renamed it Date Configurations. You can use more than one configuration to select different calendars for different data. And speaking of choices, you can select the day that your week starts. Show weekly metrics that begin on Monday or the day that you prefer.

### [Combine Unrelated Records with Cross Join \(Generally Available\)](#)

Cross join is now generally available. 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 possible menu combinations, or stores and products for stock tracking.

### [Use Multivalue Data in Your Recipes](#)

Use the new multivalue functions in Data Prep's formula transformation to get the most out of your multivalue data. For example, look for a specific value, count how many values there are, create a new multivalue by combining other text, convert a multivalue to a string, or split a string and return a multivalue.

### [Appends Round More Accurately](#)

When using the append node in recipes, rounding is now more accurate. For example, 499.99 now rounds to 500 instead of 499.

### [Get a Clearer View of Your Data with Data Sampling](#)

See a more complete preview of your data by selecting a sampling option most appropriate for your dataset. Previously, when working with recipes, you could view only the sample output of data operations based on the values in the top rows of the preview table. This change applies only to direct datasets.

### [Search for Transformation Steps by Name](#)

Quickly find transformation steps by using names. Give the step a unique name that clarifies its purpose in your recipe. Then use search to locate it.

### [Refine Date Filtering Using Relative Dates](#)

When filtering recipes, you can now choose between absolute and relative dates. Filtering by relative dates adds granularity by using time periods applicable to your business. Specify a year, quarter, month, week, or day to start and end the filter. Click the add and subtract buttons to define how far into the past or future relative to the current day. For example, you can select 3 years ahead or 3 days ago.

### Find More in Your Recipe with Enhanced Global Search

Search now extends beyond nodes to transformation steps and column names. Filter your search by node type, transformation step, or column.

### Delete Node Connections

You can now remove branch connections between nodes.

### Access Column Data in Preview

Find data quickly by searching your column labels, API names, data types, and sources right from the Columns tab.

### Search Your Columns for Any Value

Column search now extends to your full datasets and direct datasets. You can now filter, bucket, and aggregate on any value in your data. Previously, when you searched columns, results were limited to values in the preview table. And if you searched for a particular value outside of the sample, you couldn't see it in your results. Results display up to 250 values for direct datasets and 2000 for datasets. To find a value outside of the ones displayed, refine your search.

### Automate Adding All Columns to an Input Node

Sometimes when your recipe runs and syncs new data, new columns are added to the dataset that weren't available in the previous run. The Custom Columns option lists all the column in the dataset, and you select which columns to include in the next recipe run. For instances when you want to continually update every available column, use the All Columns option to eliminate manually selecting every column name.

### Automate Adding Columns to the Append Node

Keep your recipes up to date by continuously mapping all columns as your recipes change.

### Simplify Column Operations with a Single Filter Node

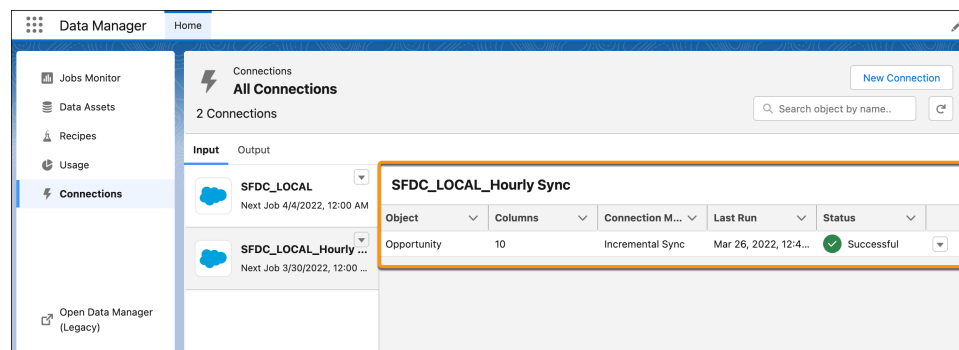
Custom filter expressions expedite performing an operation on your data, creating a column with the results, and then filtering the column results. Previously, you had to write a formula and then create a filter. Now you can add a formula and filter its output in a single filter node.

## Check Your Data at a Glance in Data Manager (Generally Available)

Data Manager has a brand new look. The streamlined Connections view in Data Manager shows connections in a column list. See details when you click a connection. Get improved visibility into your usage and limits in the new Usage view. The new Data Manager is now generally available.

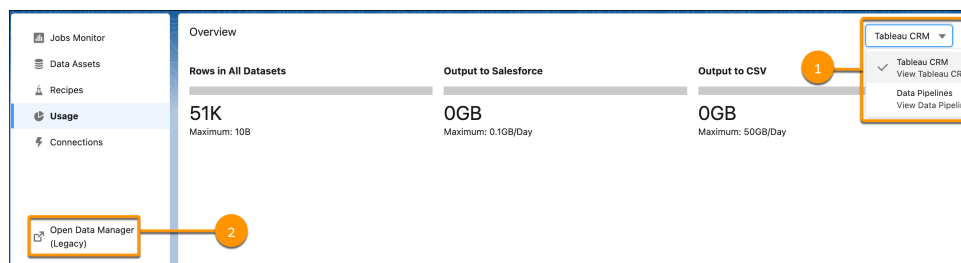
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**How:** From the Analytics Studio home page, select **Data Manager**. Select a connection to see its details in a table in the right pane.





To check if a product is nearing its limit, see the Usage section. If you have licenses for CRM Analytics and Data Pipelines, click the dropdown to switch between each product's information (1). To manage your dataflows as you convert them to recipes, or create live datasets, open Data Manager (Legacy) (2).



## Adopt Improved CRM Analytics Connectors

It's time to make the switch. The remote connectors that you use to sync data to CRM Analytics 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 CRM Analytics after August 1, 2021, and all government cloud customers, only use the new connector versions.

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### How:

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

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 true or false.
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 Aurora MySQL Connector	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS Aurora PostgreSQL Connector*	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS MariaDB Connector	The new version supports unsigned INT and unsigned BIGINT fields.
AWS RDS PostgreSQL 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.

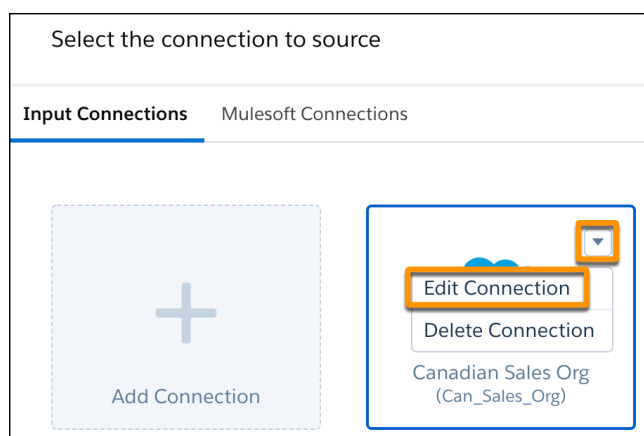
Connector	Notes
Google Analytics Connector	The <b>Use legacy connector</b> toggle has been deselected on your existing Google Analytics Connections. We recommend that you manually upgrade to the new version, <a href="#">Google Analytics Core Reporting V4 Connector</a> , now. The V4 version supports custom objects, uses core reporting API v4.0, and provides additional Google Analytics options. You must manually upgrade to the improved V4 version before July 2023 when <a href="#">Google retires Universal Analytics</a> .
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 <code>true</code> . 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 <code>true</code> . The new version doesn't use the staging environment.
Heroku Postgres 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.
Salesforce External Connector	No changes.
Salesforce Marketing Cloud OAuth 2.0 Connector*	<ul style="list-style-type: none"> <li>The new version makes more Marketing Cloud data accessible through expanded Data Extension support.</li> <li>The new version supports filtering.</li> <li>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.</li> <li>The new version names some fields differently than the legacy version. Data extensions aren't impacted.</li> <li>Top-level and child business unit MID information is now available in the object names using the format <code>ChildObjectName_childMID</code>. 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 <b>Display Child Data Extensions</b>.</li> </ul>
Snowflake Connector	The new version supports key pair authentication and OAuth.

\*These connectors now return Boolean values as 0 or 1. Update recipes, dataflows, and other tools to these values.

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
NetSuite Connector	The new version names objects differently than the legacy version. After upgrading, update your recipes and dataflows with the new object names.
Oracle Eloqua Connector	The new version uses different field names, includes more objects than the legacy version, and doesn't support the Activity object.

To manually upgrade, on the Data Manager Connect tab, select **Connect to Data**. From the connection's menu, select **Edit Connection**.



Turn off **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 by deselecting **Use legacy connector**, and must manually migrate.

Connector	Notes
Marketo Legacy Connector (Beta)	The new version, Marketo Connector (Beta), supports filtering on select objects. The legacy version will be retired during the Summer '22 release.
Salesforce Marketing Cloud Contacts Connector	The new version, Salesforce Marketing Cloud OAuth 2.0 Connector, introduces OAuth 2.0 authentication and several other benefits: <ul style="list-style-type: none"> <li>The new version makes more Marketing Cloud data accessible through expanded Data Extension support.</li> </ul>

Connector	Notes
	<ul style="list-style-type: none"> <li>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.</li> <li>The new version names some fields differently than the legacy version. Data extensions aren't impacted.</li> <li>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 <b>Display Child Data Extensions</b>.</li> <li>The new version needs package permissions Allow Provisioning: Accounts Read and User Read, and Allow Data: Data Extensions Read.</li> </ul>
SAP HANA Connector	The new version, SAP HANA Cloud Connector, supports filtering, increased throughput, uses different connection properties, and is JDBC-based. The new version also allows access to the SAP HANA cloud.

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.

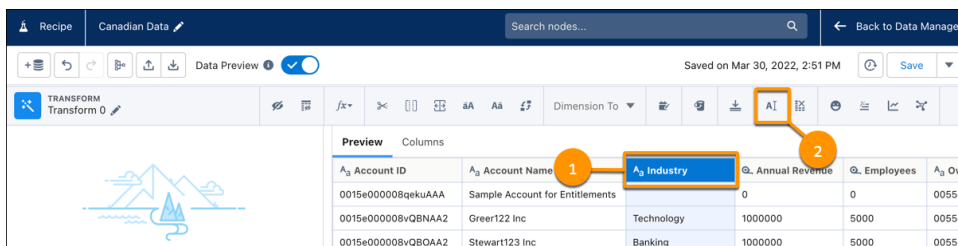
If you have more questions, you can join the conversation in the [CRM Analytics Connectors Trailblazer Group](#).

## Match the Tableau Online Output File to Your Business Requirements

Make integrating output data into your Tableau Online processes more intuitive by customizing the Tableau Online Output connector file name and columns. You can now specify the name of the .hyper file, which ends with .hyper instead of .hyper.hyper. And your exported file uses column names instead of API names.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 output file column names, add a transform node to a recipe. Select the column (1) and click the Edit Attributes transformation (2).



Enter the new value in the Label field. Keep column labels unique or the output fails.

The screenshot shows the 'Edit Attributes (Industry)' configuration window. At the top, there is a header bar with a blue icon and the text 'TRANSFORM Transform 0'. Below this, the title 'Edit Attributes (Industry)' is displayed with a blue 'AI' icon. A description states 'Updates the column attributes. [Learn More](#)'. The configuration fields are: 'Label' with the value 'Vertical', 'API Name' with the value 'Industry', and 'Length' with the text 'If left blank, default value is 255.'.

To customize the file name, add an output node to a recipe, configure it to use the Tableau Online Output connection, and update the Hyper File field.

The screenshot shows the 'OUTPUT Output 1' configuration window. At the top, there is a header bar with a purple icon and the text 'OUTPUT Output 1'. Below this, the 'Write To' dropdown is set to 'Output Connection'. The 'Connection Name' dropdown is set to 'TOL\_output'. The 'Object Name' dropdown is set to 'Select an Option'. The 'Hyper File' field is highlighted with an orange border and contains a vertical line. At the bottom, there are 'Cancel' and 'Apply' buttons.

Files output to Tableau Online as *name.hyper*. If you don't specify a file name, the file is named Extract.hyper.

SEE ALSO:

[Salesforce Help: Tableau Online Output Connection \(can be outdated or unavailable during release preview\)](#)

## Connect More Securely to Tableau Online with Personal Access Tokens

You can now use Tableau Online Personal Access Tokens to connect with CRM Analytics when using the Tableau Online output connector. A Personal Access Token is more secure than username and password authentication, better for auditing and tracking, and improves automation management. With the February 1, 2022 MFA requirement for Tableau Online, connections using username and password authentication aren't compliant and must be updated to a system such as Personal Access Tokens.

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**How:** Create a Personal Access Token for your Tableau Online account. Add or edit a Tableau Online Output connection.

The screenshot shows a 'Set Up Your Connection' form. It contains the following fields and labels:

- Content URL:** hypersynthm9j2g3a
- Server URL:** https://us-west-3j.online.tableau.com
- PersonalAccessTokenName:** Labeled with a circled '2'.
- PersonalAccessTokenSecret:** Labeled with a circled '3'.
- Authentication Type:** Labeled with a circled '1'. The dropdown menu shows 'PersonalAccessToken' selected.

At the bottom of the form are two buttons: 'Previous' and 'Save and Test'.

Enter *PersonalAccessToken* in the Authentication Type field (1). Add your personal access token name (2) and secret (3).

### SEE ALSO:

[Salesforce Help: Tableau Online Output Connection \(can be outdated or unavailable during release preview\)](#)

[Tableau Help: Personal Access Tokens](#)

## Connect More Securely to Snowflake and Hubspot with OAuth 2.0

Syncing your data from Snowflake and Hubspot to CRM Analytics is even more secure with the option to use OAuth 2.0 authentication. With OAuth 2.0 authentication, you don't share or store user login credentials.

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**How:** Configure Hubspot or Snowflake for OAuth 2.0. Hubspot has its own authentication server, and Snowflake supports several services. Contact your Network Security or IT department for help with configuration consistent with your organization's security requirements.

Add the authentication provider to Salesforce, and define a named credential. On the Data Manager connect tab, add a connection, and select the Hubspot or Snowflake connector. Enter the connector properties, including *OAuth* for the Authentication Type, and the name value of your named credential.

#### SEE ALSO:

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

[Snowflake Help: Introduction to OAuth](#)

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

[Hubspot Developer Documentation: OAuth Quickstart Guide](#)

[Salesforce Help: Configure an Authentication Provider \(can be outdated or unavailable during release preview\)](#)

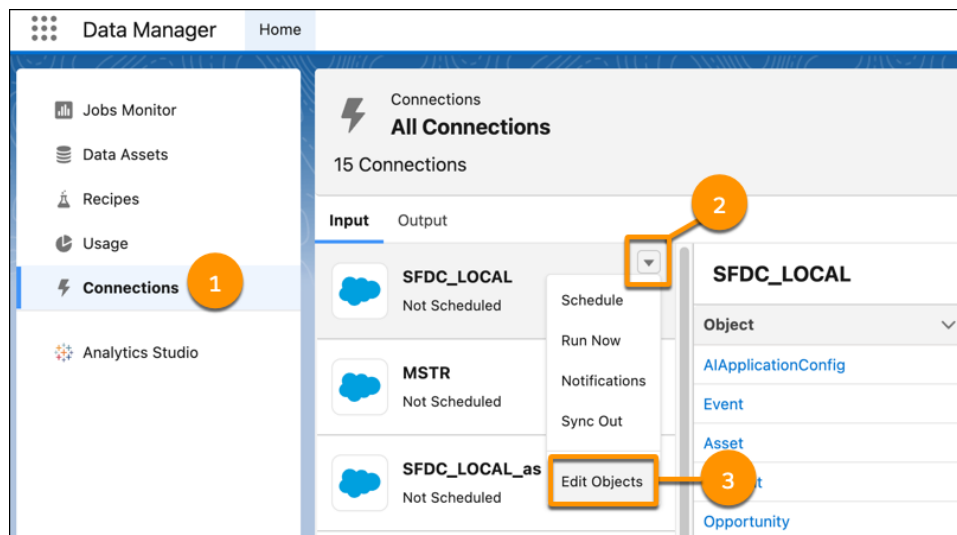
[Salesforce Help: Define a Named Credential \(can be outdated or unavailable during release preview\)](#)

## Customize Local Salesforce Field Metadata

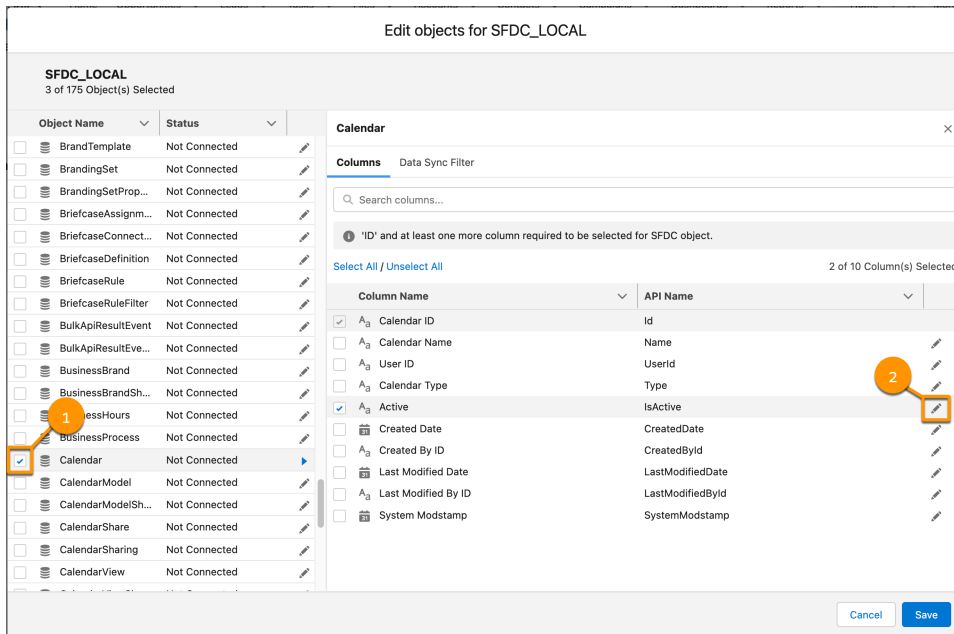
You can now configure the field metadata for local Salesforce data synced to CRM Analytics from Data Manager. From the Connect page, change properties such as field type, precision, date format, or default value. For example, update a text long field from 32,758 characters to the CRM Analytics-supported 32,000 characters so that it can sync successfully.

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**How:** From the Connections tab of the Data Manager (1), from a local connection's menu (2), select **Edit Objects** (3).



Select an object (1). Click  (2) on the column to adjust.



Update the column's field properties.

The 'Active' field properties dialog box shows the following settings:

- Field Label:** Active
- Field Type:** Dimension
- Default Value:** false
- Precision:** (empty)
- Is a Multi Value:** (unchecked)
- Multi Value Separator:** (empty)

The most recently saved field metadata settings from the Connect page or SFDCdigest transform are applied to the database values.

SEE ALSO:

[Salesforce Help: Add and Remove Remote Objects and Fields from Data Sync](#) (can be outdated or unavailable during release preview)

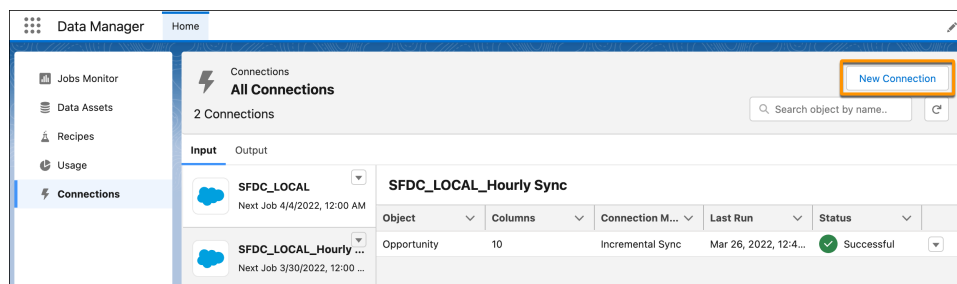
## Sync Data from Tableau Online

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**How:** On the Data Manager's Connections tab, click **New Connection**.



Select the Tableau Online Connector. Enter the connector properties, and then save and test. When the connection is configured, select which objects to pull, and set a data sync schedule to keep the data fresh.

SEE ALSO:

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

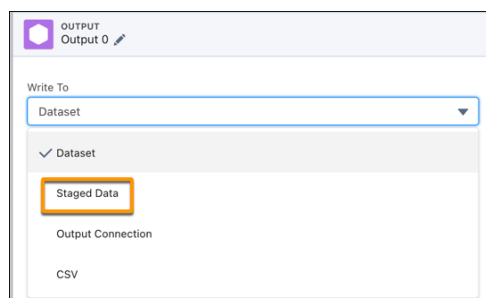
## Run Sequential Recipes Faster with Staged Data (Beta)

Staged data is an alternative to datasets that reduces processing time when your data strategy involves multiple recipes. A precursor recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, instead of merging account and opportunity data in each region-specific forecasting recipe, simply merge one time, output as staged data, and use this data in the other recipes.

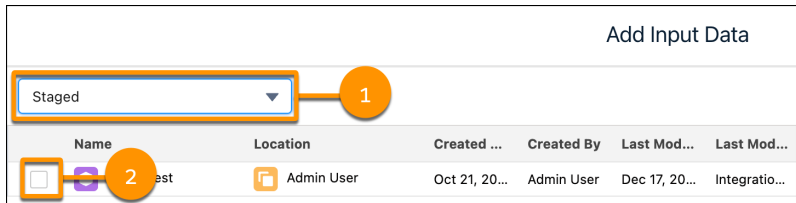
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 **Note:** This feature is a Beta Service. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**How:** Contact Salesforce Customer Support to enable Staged Data. From Setup, in the Analytics section, enable **Allow recipes to create staged data**. Build the first recipe in a sequence of recipes, add an output node, and select to write to **Staged Data**.



Build the second recipe, select to add input data, and choose to include Staged Data (1). Select the staged data from the first recipe (2).



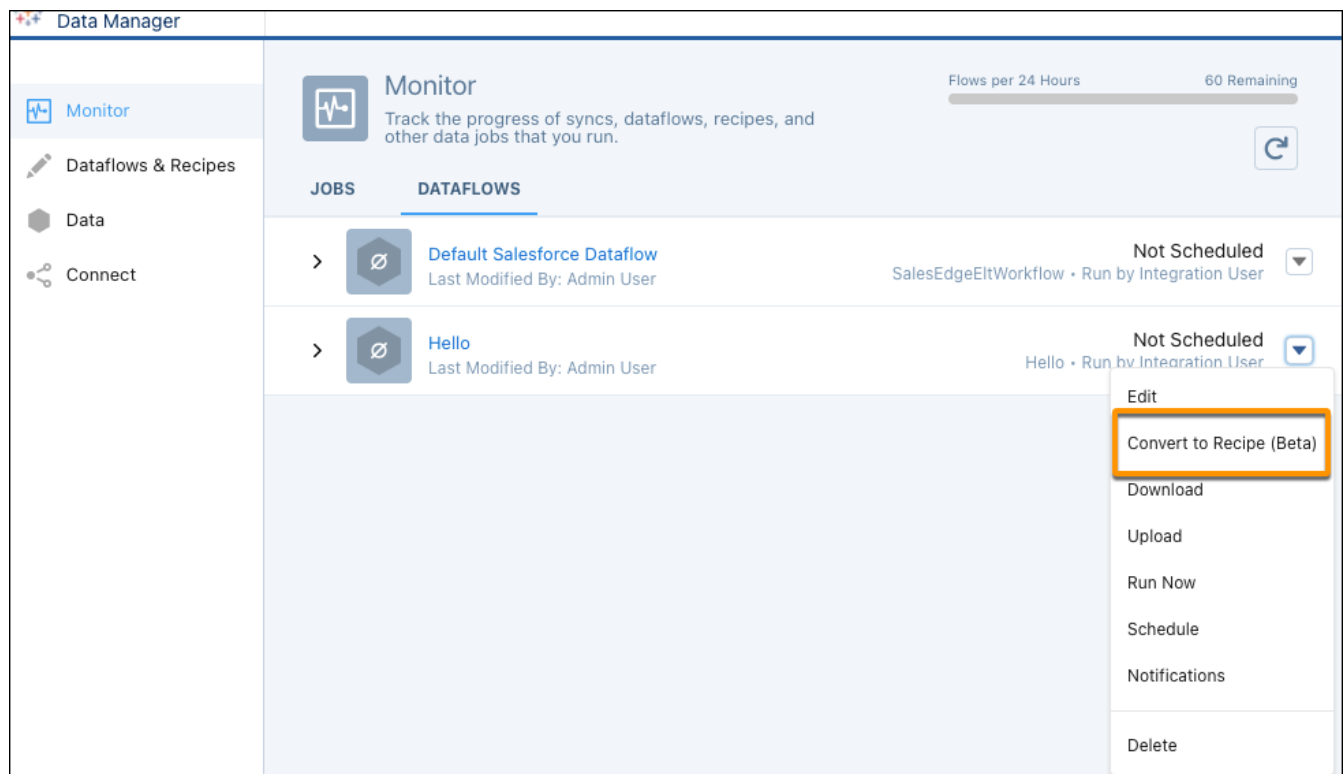
Continue to build and save your recipe as usual. When the recipe runs, the staged data is used as an input source.

## Convert Dataflows to Recipes (Beta)

Turn dataflows into recipes with a click of a button. Upgrade your old dataflows to recipes to use the latest Data Prep features such as joins, aggregates, sentiment detection, and more within an improved user experience. With the new Convert to Recipe (Beta) option, you can create recipes from dataflows. Your original dataflows are untouched when new recipes are generated.

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**How:** In Data Manager (Legacy), from the dataflow menu, select **Convert to Recipe (Beta)**.



SEE ALSO:

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

## Get Started Faster with Data Templates (Beta)

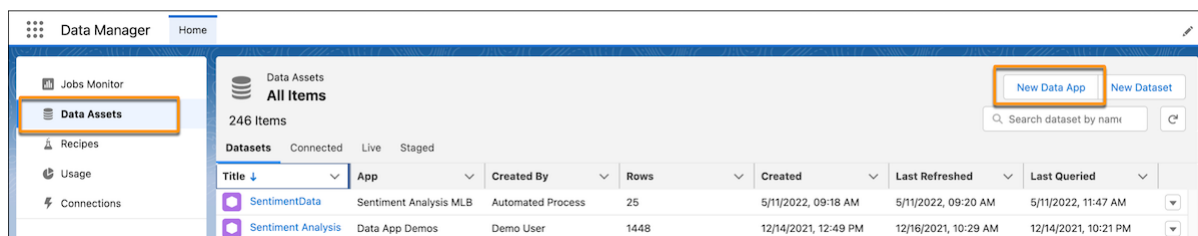
Data templates are prepackaged data manipulation processes ready to be deployed in a matter of clicks. They include the data connectors, data prep recipes, and queries for common data use cases so you can focus your attention on the results rather than the process. The template configuration wizard walks you through customizing the data use case.

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**How:** In Data Manager, select the **Data Assets** tab. To open the template gallery for data templates, click **New Data App**.



Select a data template and click **Next**. If the template that you selected includes a configuration wizard, it opens now. Answer the questions on each page of the wizard, setting up the workflow for importing and processing the data. Name your data app, add a description for more information, and click **Create**.

On the Monitor tab, view the jobs run for the generated data assets. On the Recipes tab, view and schedule the Data Prep recipes created by the template. Each data asset that the template generates is appended with the app name that you specified in the template configuration wizard.

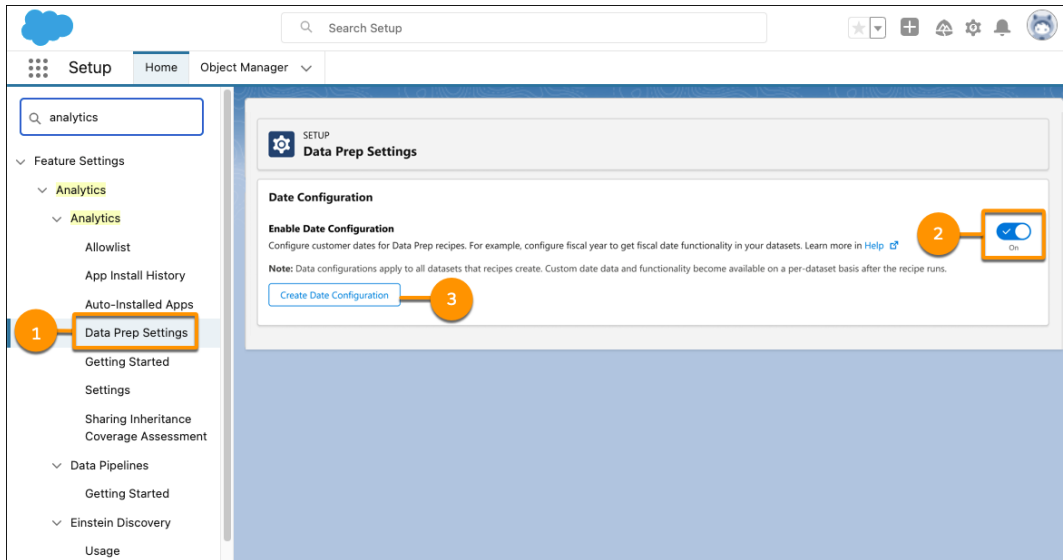
The first data templates available in Summer '22 is the Sentiment Analysis template. Use the Sentiment Analysis data template to categorize selected text into sentiments quickly. This template creates a recipe that performs sentiment analysis on a source object field that you select in the configuration wizard. This recipe outputs a dataset with the analysis results.

## Data Prep Fiscal Configuration Is Now Called Date Configurations and Does More

Data Prep Fiscal Configuration now does so much more for your date handling that we've renamed it Date Configurations. You can use more than one configuration to select different calendars for different data. And speaking of choices, you can select the day that your week starts. Show weekly metrics that begin on Monday or the day that you prefer.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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*, and then select **Data Prep Settings** (1). Turn on Date Configurations (2). To create a Date Configuration, click **Create Date Configuration** and define your settings (3).



Define your calendar settings.

\* Name

\* Label

\* Fiscal Year Start ⓘ

\* Fiscal Year is Based On:  
☒ The starting month  
☐ The ending month

\* Week Start

☒ Default ⓘ

The default date configuration is automatically applied to all datasets created by recipes unless you manually select another date configuration in the recipe. To change the recipe's date configuration, use **Date Configuration** on the Output or date extract transformation node.

OUTPUT  
Output 0

Write To  
Dataset

\* Dataset Display Label  
Weekly Metrics

Dataset API Name ⓘ  
Weekly\_Metrics

\* App Location  
My Private App

Date Configuration

Week Start Monday

✓ Week Start Monday

Fiscal Year Feb

Fiscal Year Feb & Week Start Monday

Fiscal Year Feb & Week Start Saturday

Cancel Apply

SEE ALSO:

[Salesforce Help: Data Prep's Fiscal Year Configuration \(can be outdated or unavailable during release preview\)](#)

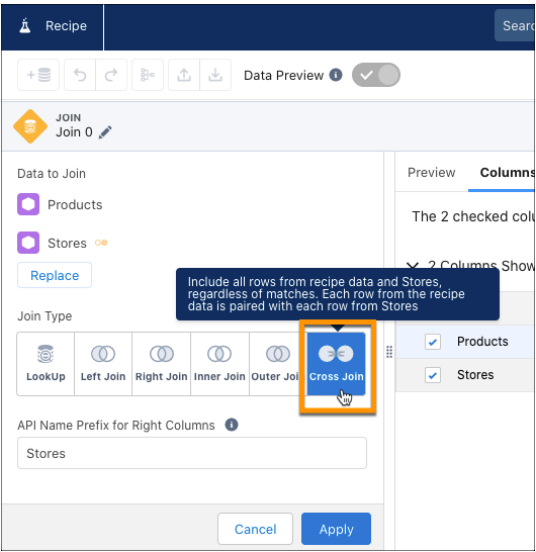
[Salesforce Help: Date Formats and Fiscal Dates for Source Data \(can be outdated or unavailable during release preview\)](#)

## Combine Unrelated Records with Cross Join (Generally Available)

Cross join is now generally available. 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 possible menu combinations, or stores and products for stock tracking.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 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 possible pairs of product and store.

Left		Right	
Row #	Product	Row #	Store
1	Batteries	1	San Francisco
2	Electronics	2	Boston
3	Accessories		

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

Row #	Product	Store
1	Batteries	San Francisco
2	Batteries	Boston
3	Electronics	San Francisco
4	Electronics	Boston
5	Accessories	San Francisco
6	Accessories	Boston

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:

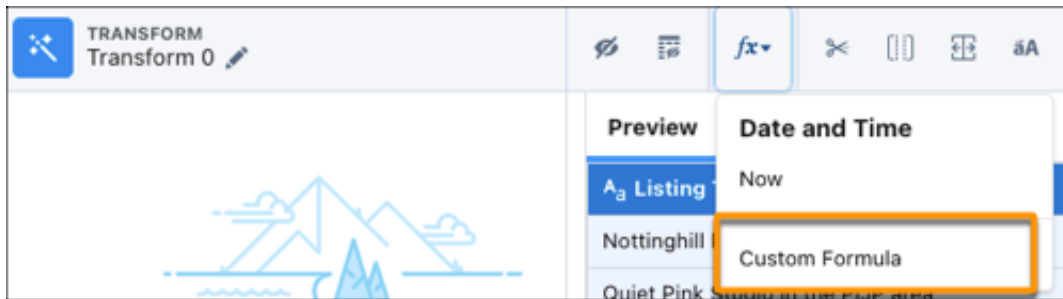
[Salesforce Help: Cross Join \(Beta\)](#) (can be outdated or unavailable during release preview)

## Use Multivalue Data in Your Recipes

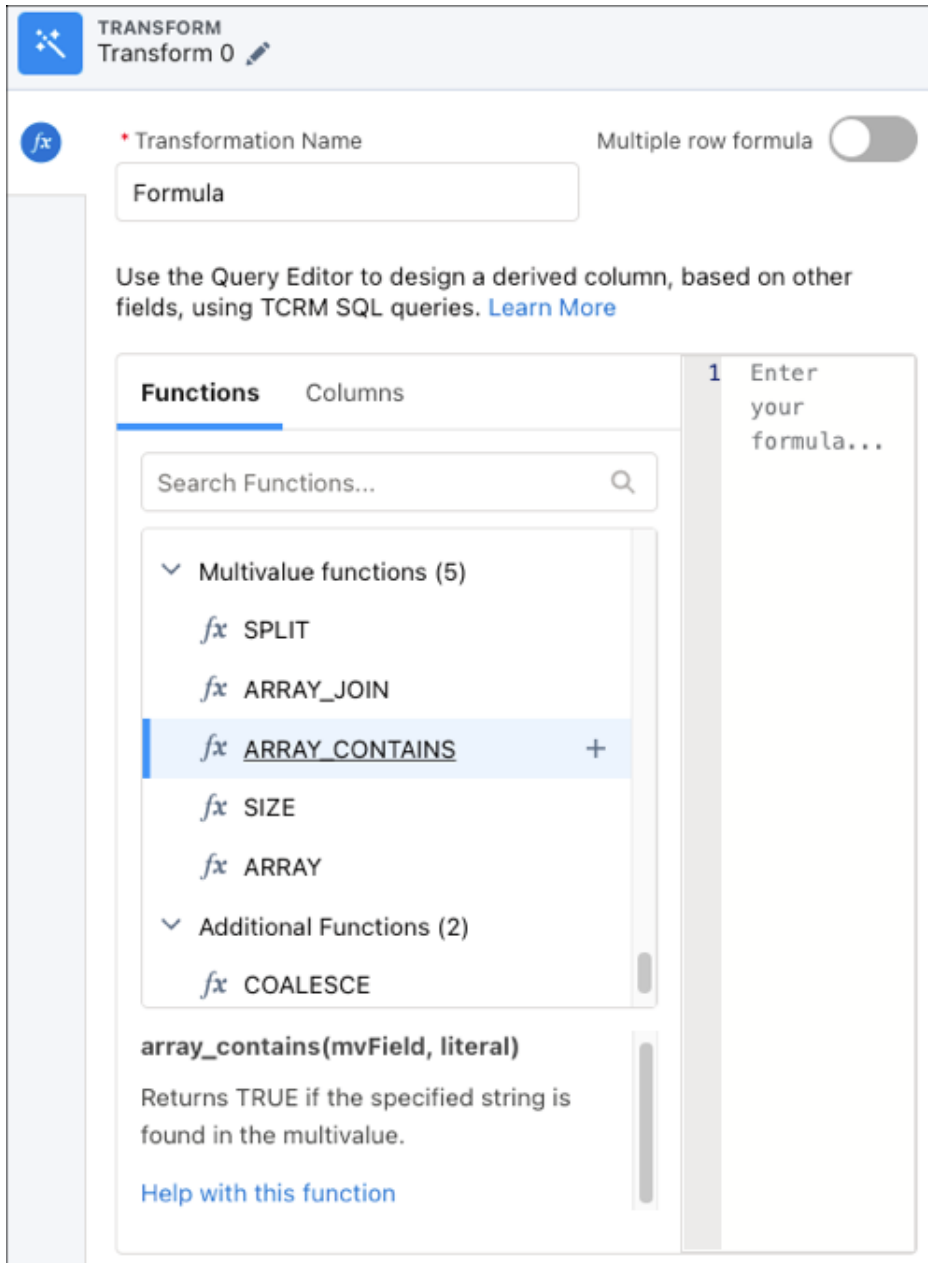
Use the new multivalue functions in Data Prep's formula transformation to get the most out of your multivalue data. For example, look for a specific value, count how many values there are, create a new multivalue by combining other text, convert a multivalue to a string, or split a string and return a multivalue.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 a Data Prep recipe transform node, use the toolbar to select Formula ( *fx* ), and then select **Custom Formula**.



In the formula editor panel, choose a multivalue function.



SEE ALSO:

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

## Appends Round More Accurately

When using the append node in recipes, rounding is now more accurate. For example, 499.99 now rounds to 500 instead of 499.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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.



## Get a Clearer View of Your Data with Data Sampling

See a more complete preview of your data by selecting a sampling option most appropriate for your dataset. Previously, when working with recipes, you could view only the sample output of data operations based on the values in the top rows of the preview table. This change applies only to direct datasets.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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.

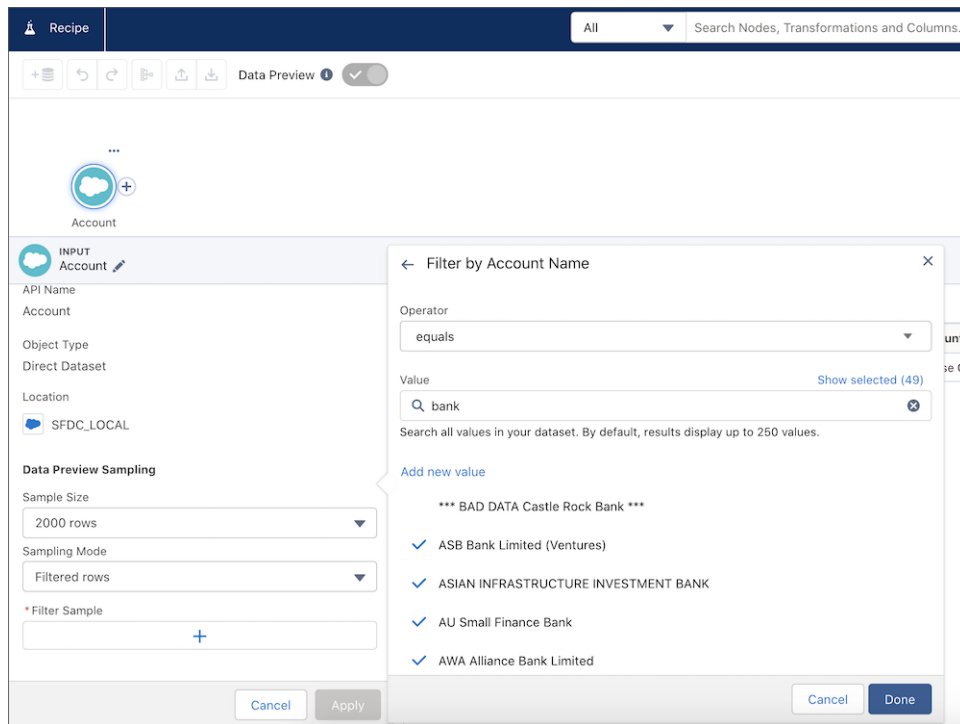
**How:** In a Data Prep recipe input node, under Data Preview Sampling, select the number of rows to include in the preview.

The screenshot shows the 'Recipe' interface for an 'Account' input node. The 'Data Preview Sampling' section is highlighted with an orange box. It shows a 'Sample Size' of '50 total' and a dropdown menu currently set to '2000 rows'. The 'Preview' table on the right shows columns: BillingCountry, BillingCity, OwnerId, and a numeric column. The table contains 10 rows of data.

Under Sampling Mode, select the mode that best fits the needs of your data. To populate a sample when you want to see all column values, such as when creating a bucket, select **All Column Values**. To isolate specific values, select **Filtered Rows**.

The screenshot shows the 'Recipe' interface for an 'Account' input node. The 'Data Preview Sampling' section is highlighted with an orange box. It shows a 'Sample Size' of '50 total' and a dropdown menu currently set to 'Filtered rows'. The 'Preview' table on the right shows columns: Account ID, Deleted, Master Record ID, Account Name, Account Type, and Parent Account ID. The table contains 10 rows of data.

If you choose the Filtered Rows sampling mode, click the **+** under Filter and choose the column value to filter on. Select the values to include in your filtered results.



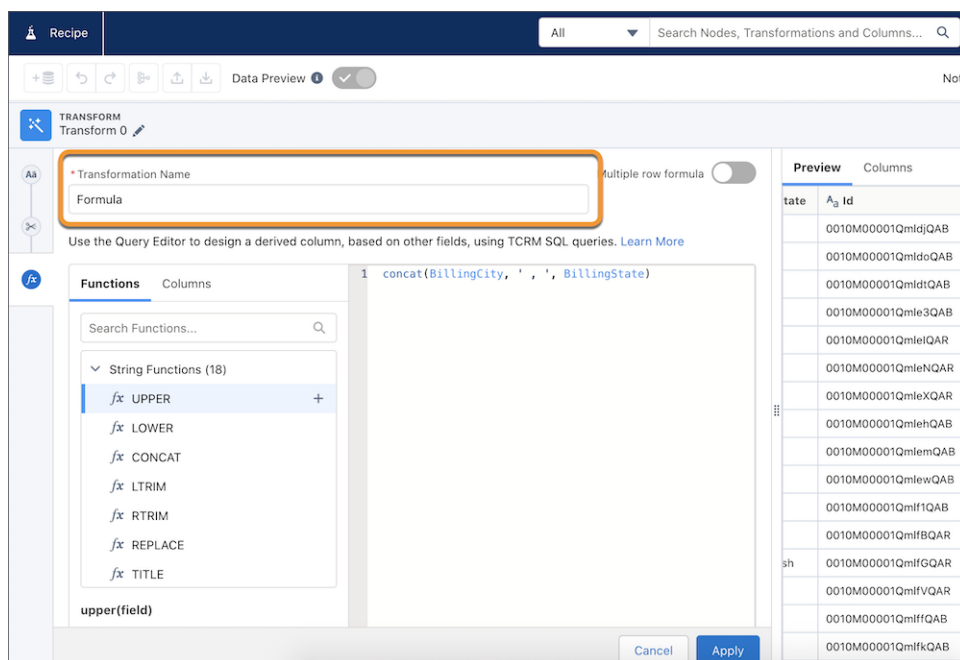
Click **Done**.

## Search for Transformation Steps by Name

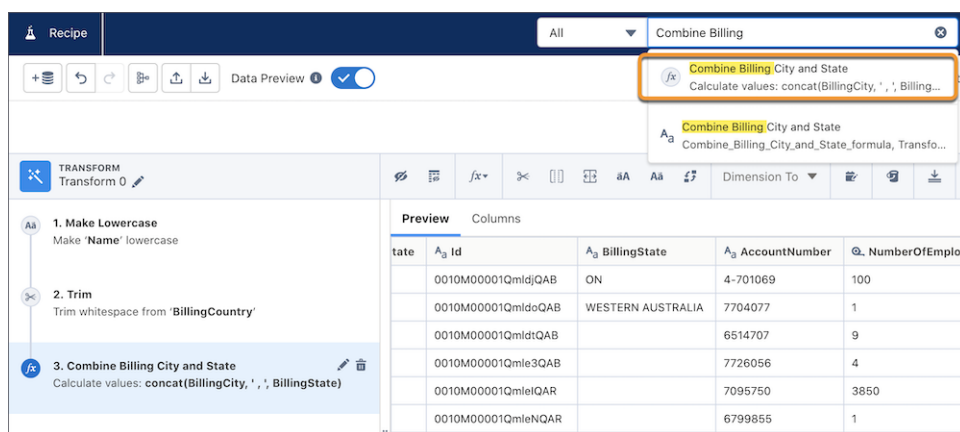
Quickly find transformation steps by using names. Give the step a unique name that clarifies its purpose in your recipe. Then use search to locate it.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 a Data Prep recipe, click a transform node, edit the name, and click **Apply**.



To search for a step name, enter the name in the recipe graph search bar.

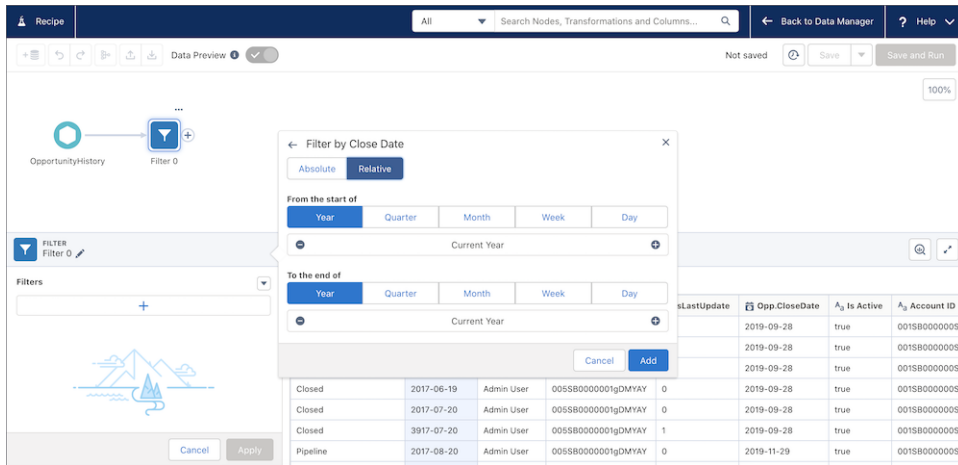


## Refine Date Filtering Using Relative Dates

When filtering recipes, you can now choose between absolute and relative dates. Filtering by relative dates adds granularity by using time periods applicable to your business. Specify a year, quarter, month, week, or day to start and end the filter. Click the add and subtract buttons to define how far into the past or future relative to the current day. For example, you can select 3 years ahead or 3 days ago.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 a Data Prep filter node, click the **+** to create a filter. Select a column from your dataset that contains a date value. In the date filter window, click **Relative**.

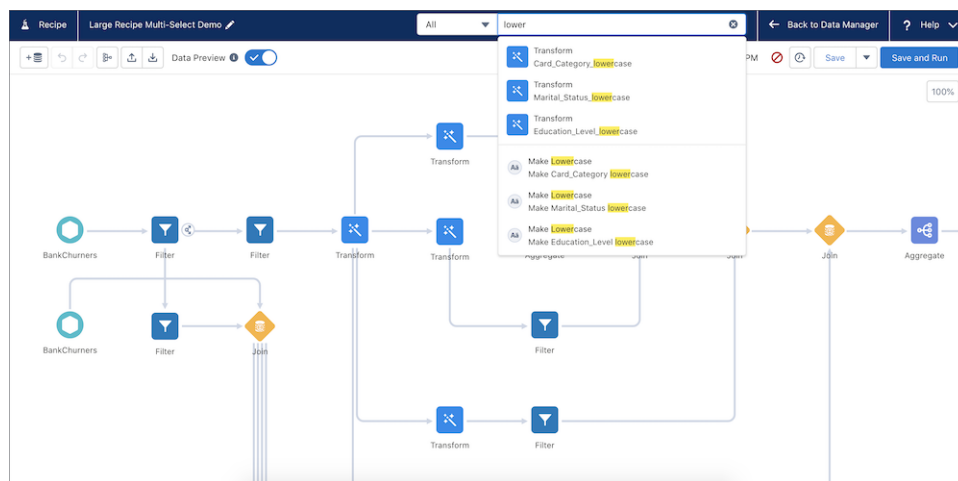


## Find More in Your Recipe with Enhanced Global Search

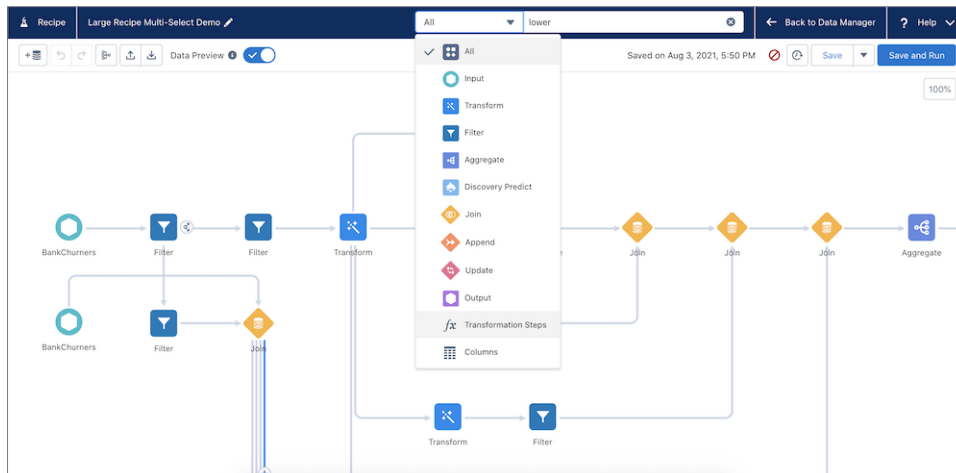
Search now extends beyond nodes to transformation steps and column names. Filter your search by node type, transformation step, or column.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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:** Enter the name of a node, column, or transformation step in the search bar at the top of the recipe graph.



To filter a search, select an option from the dropdown menu next to the search bar.

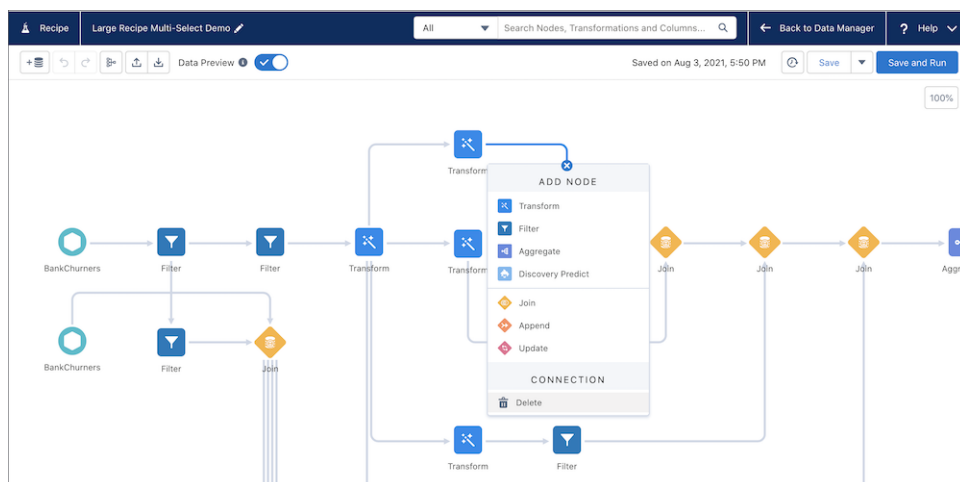


## Delete Node Connections

You can now remove branch connections between nodes.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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:** Hover over a branch, and click **+**. Select **Delete**.

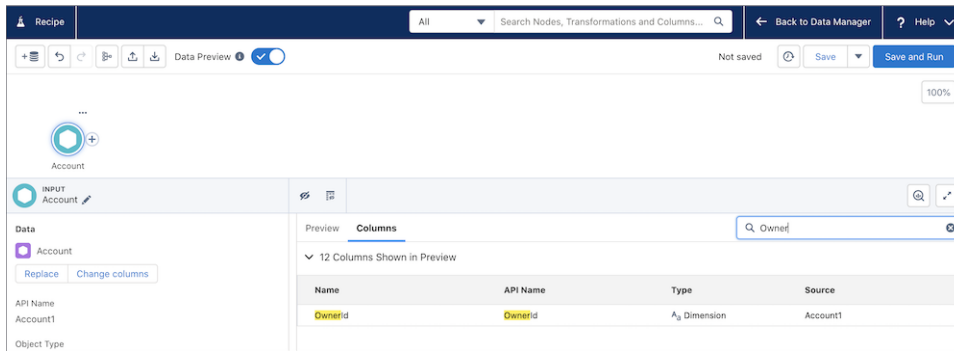


## Access Column Data in Preview

Find data quickly by searching your column labels, API names, data types, and sources right from the Columns tab.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 a node's details section, on the Columns tab, enter a column name in the search bar.

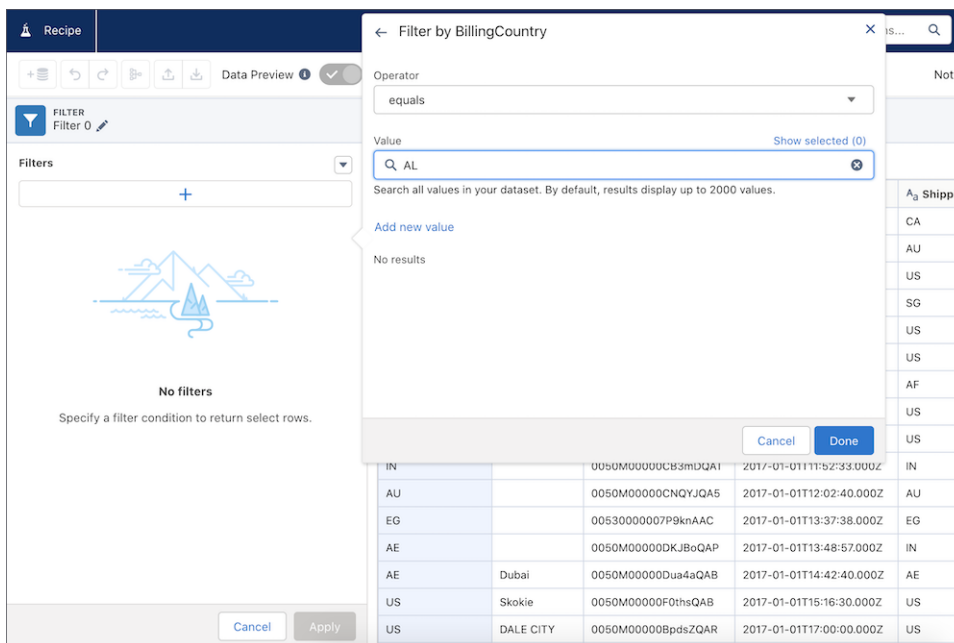


## Search Your Columns for Any Value

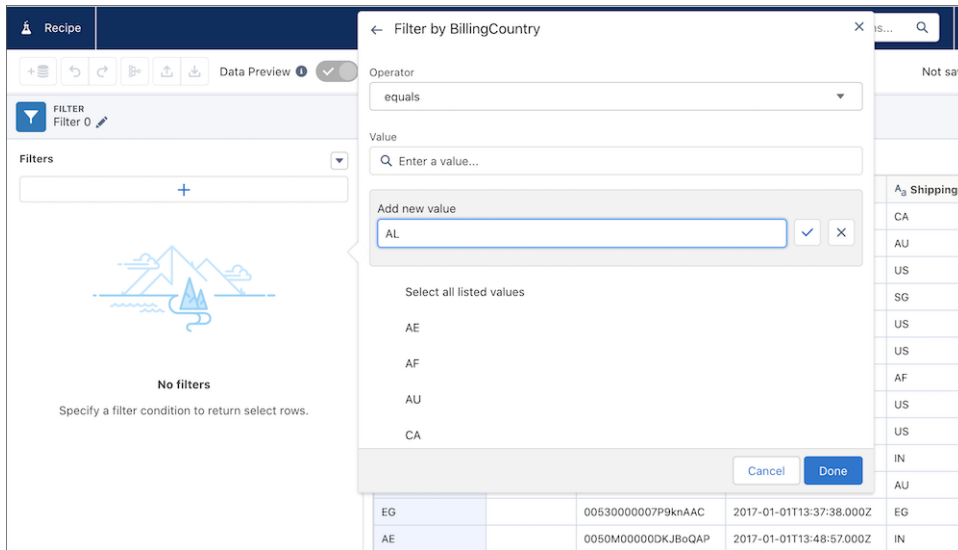
Column search now extends to your full datasets and direct datasets. You can now filter, bucket, and aggregate on any value in your data. Previously, when you searched columns, results were limited to values in the preview table. And if you searched for a particular value outside of the sample, you couldn't see it in your results. Results display up to 250 values for direct datasets and 2000 for datasets. To find a value outside of the ones displayed, refine your search.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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.

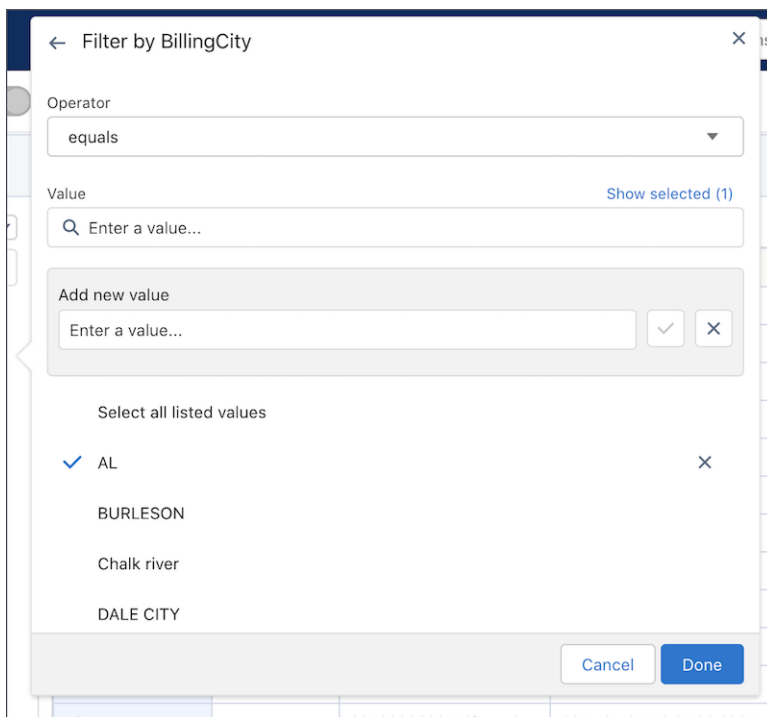
**How:** In a filter, aggregate, or transform node, select a column, and then enter a value to search.



If the value doesn't display in the results, click **Add new value**.



Enter the value in the search bar and click the checkmark. The new value appears in the list of the results. The checkmark means it's included in the filtered data. Select any other values that you want to include in your filtered data, and click **Done**.

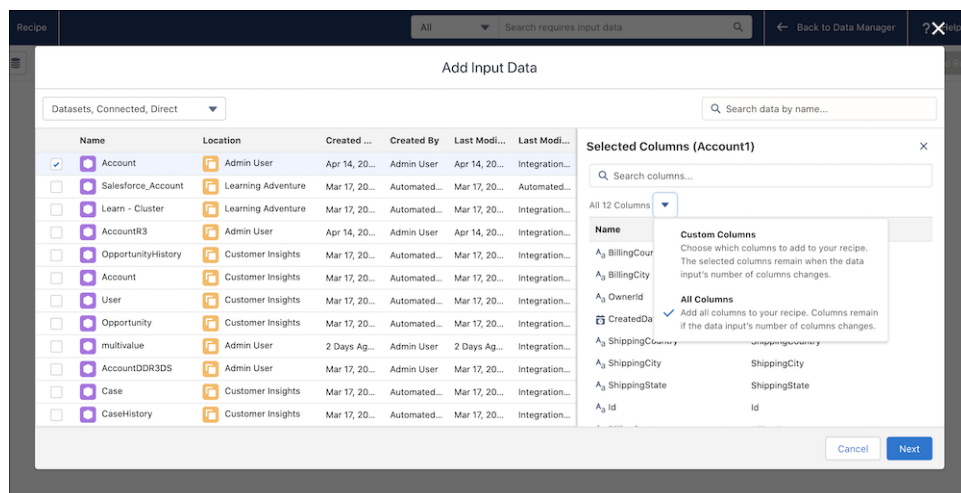


## Automate Adding All Columns to an Input Node

Sometimes when your recipe runs and syncs new data, new columns are added to the dataset that weren't available in the previous run. The Custom Columns option lists all the column in the dataset, and you select which columns to include in the next recipe run. For instances when you want to continually update every available column, use the All Columns option to eliminate manually selecting every column name.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 the Add Input Data window, under the Selected Columns panel, click the dropdown next to the number of columns selected. Select **All Columns**.



## Automate Adding Columns to the Append Node

Keep your recipes up to date by continuously mapping all columns as your recipes change.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 selecting a dataset to append, turn on **Map all columns** in the node details section, and click **Apply**.



The screenshot shows the 'Append' node configuration in a Salesforce Data Pipeline. The interface has a dark blue header with a 'Recipe' tab and a 'Data Preview' toggle. Below the header, there's a toolbar with icons for adding, undo, redo, and data operations. The main area is titled 'APPEND Append 0' and contains a 'Data to Append' section with checkboxes for 'Account' and 'User'. A 'Replace' button is also present. Below this, there's a text instruction: 'Map node column names to recipe column names. Appended rows show null values for recipe columns that aren't mapped.' A 'Map all columns' toggle is checked, and there's an 'Allow schema merge' checkbox which is unchecked. At the bottom, there are 'Cancel' and 'Apply' buttons.

## Simplify Column Operations with a Single Filter Node

Custom filter expressions expedite performing an operation on your data, creating a column with the results, and then filtering the column results. Previously, you had to write a formula and then create a filter. Now you can add a formula and filter its output in a single filter node.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 a Data Prep filter node, select **Add Custom Expression** from the dropdown menu.

Recipe SQL filter Search Nodes, Transformations and Columns... Back to Data

Data Preview Saved on Apr 18, 2022, 1:32 PM

**FILTER**  
Simple SQL Filter

Filters

Add Custom Expression

No filters  
Specify a filter condition to return select rows.

Preview Columns

A <sub>3</sub> Lead Source	A <sub>3</sub> Closed	A <sub>3</sub> Won	A <sub>3</sub> Forecast Category	A <sub>3</sub> Owner ID	Created Date
Trade Show	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Web	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Web	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Word of mouth	true	false	Omitted	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Partner	false	false	Pipeline	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Trade Show	false	false	Pipeline	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Advertisement	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Partner	false	false	Pipeline	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Web	false	false	Forecast	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Employee Referral	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Word of mouth	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Web	false	false	Pipeline	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Employee Referral	true	true	Closed	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Employee Referral	true	false	Omitted	005S7000000G0lglAK	2020-06-24T22:31:26.000Z
Word of mouth	false	false	Pipeline	005S7000000G0lglAK	2020-06-24T22:31:26.000Z

Cancel Apply

Enter a filter expression, following the syntax of a custom formula transformation. Unlike a custom formula, a filter expression always evaluates to true or false.

**FILTER**  
Simple SQL Filter

Filter Expression Editor

Functions Columns

Search Functions...




String Functions (18)

- fx UPPER +
- fx LOWER
- fx CONCAT
- fx LTRIM
- fx RTRIM
- fx REPLACE
- fx TITLE

**upper(field)**  
Returns the string with all characters in uppercase.

1 upper(LeadSource) = 'WEB'

Click **Apply**. The column displays the filtered values.

Preview Columns		
 Close Date	 Opportunity Type	 Lead Source
2019-01-30	Existing Business	Web
2019-01-08	Existing Business	Web
2020-10-14	New Business / Add-on	Web
2020-08-04	New Business / Add-on	Web
2020-04-22	New Business	Web
2019-05-04	New Business	Web
2019-12-16	New Business / Add-on	Web
2019-07-11	New Business	Web
2020-02-27	New Business / Add-on	Web

## Analytics Prebuilt Apps

Monitor and troubleshoot templated app creation with the enhanced app installer and customizable log levels. Try the updated Customer Insights Opportunity embedded dashboard, which makes it a snap to get details about your opportunities whenever you need them. In addition, Customer Insights supports Person accounts. Lastly, you can track revenue, pipeline, leads, activities and top accounts in the new Customer Insights Sales dashboard.

### IN THIS SECTION:

#### [Monitor Templated App Creation with the Enhanced App Installer](#)

Monitor and troubleshoot templated app creation with the enhanced app installer and customizable log levels. View the app creation process and the logs on the new App Install History page. This feature is available for all CRM Analytics templated apps.

#### [Get Your Opportunity Details in a Snap with the New Customer Insights Opportunity Embedded Dashboard](#)

Focus on the details about your opportunities in one convenient dashboard. You can see details, such as the probability of the opportunity, the deal age, and the current stage.

#### [Customize the New Customer Insights Sales Performance Dashboard with Ease](#)

The Sales Performance dashboard shows how your sales are trending. The Customer Insights Sales Performance dashboard is designed for easy customization because it uses minimal SAQL and interactions (formerly called bindings). You can customize the dashboard or use it to understand best practices to design your own dashboard.

#### [Get B2C Insights with Person Account Details in Customer Insights Datasets](#)

Now the Customer Insights app can provide insights about Person accounts in the Opportunity dataset. Including the Person account allows you to perform analytics on your customer information, giving you a deeper understanding of your customers' experiences.

#### [Monitor the Order Journey with Order Tracking Analytics](#)

Minimize order fallout risks and improve SLA adherence with the new Order Tracking Analytics. Use these data-driven insights to monitor the order journey, identify the orders and tasks that require immediate attention, and plan preventive actions for orders predicted to fail.

## Monitor Templated App Creation with the Enhanced App Installer

Monitor and troubleshoot templated app creation with the enhanced app installer and customizable log levels. View the app creation process and the logs on the new App Install History page. This feature is available for all CRM Analytics templated apps.

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

**How:** To use the enhanced app installer, on the final step in the app creation process, select **Enable enhanced app installer**. The default log level for app installation is **Warning**, but other levels can be selected here.

Click **Create** and now the App Install History page shows the app installation details and logs. From Setup, in the Quick Find box, enter *App Install History*, and then select **App Install History**.

App Name	Install Overview	Last Modified	Log/State Size	Total Duration
Design Styles	1	03/07/2022, 10:53:10 AM	38.41Kb	2m 59s
Learning Adventure	0 2	04/08/2022, 10:22:21 AM	211.58Kb	18m 32s

Look for your app on the summary page, and select it to see installation or upgrade details.

**App Install History**

Installed Analytics Apps > Design Styles History

**Install Detail for Request 'Create Design Styles'**  
Install detail for record 'Create Design Styles' in task order

Created By: Admin User Created On: 03/07/2022, 10:50:07 AM Status: Success Logging: Warning Started: 03/07/2022, 10:50:10 AM Stopped: 03/07/2022, 10:53:09 AM Elapsed Time: 2m 59s Task Time: 3m 49s Log/State Size: 38.41Kb

**Tasks**

Page 1 of 5 - Rows: 49

Name	Task Type	Status	Start	Time	Log	State	Message
Validate Organization	OrganizationValidati...	Success	10:50:11 AM	1s		274	Organization check complete
Check Existing Processes	AssetsInProgressVal...	Success	10:50:12 AM	1s		274	No application assets marked in-progress.
Dependent Apps	DependentAppsTem...	Success	10:50:13 AM	1s		274	Completed adding template dependencies
Create Application	FolderTemplate	Success	10:50:14 AM	2s		322	Successfully created folder [Design Styles] with id [00IRM000000gjxYAA]
Creating CSV UX_Sample_Data_1	ExternalDataTemplate	Success	10:50:17 AM	32s		397	Successfully created dataset [UX_Sample_Data_1].
Creating CSV Fins_Sample_Data	ExternalDataTemplate	Success	10:50:21 AM	42s		396	Successfully created dataset [Fins_Sample_Data].
Creating CSV static1	ExternalDataTemplate	Success	10:50:23 AM	50s		391	Successfully created dataset [static1].
Creating xmd UX_Sample_Data_1	DatasetXmdTemplate	Success	10:51:14 AM	3s		466	Successfully created resource type [xmd], label [UX_Sample_Data_1].
Creating xmd Fins_Sample_Data	DatasetXmdTemplate	Success	10:51:17 AM	2s		466	Successfully created resource type [xmd], label [Fins_Sample_Data].

View the log lines for increased details and debugging information. To see more details, select a finer log level during app creation or upgrade.

**App Install History**

Installed Analytics Apps > Learning Adventure History > Install Detail for Request 'Update Learning Adventure'

**Logging Detail for 'Upgrade Application'**

Time User Level Source Message

04/08/2022, 10:07:58 AM	admin@eadl-ra.org	Info	System	Runtime task node status changed from [NewStatus] to [EnqueuedStatus]
04/08/2022, 10:07:58 AM	admin@eadl-ra.org	Info	System	Runtime task node state updated.
04/08/2022, 10:07:58 AM	admin@eadl-ra.org	Finest	System	Auto-flush interval configured for 1000 entries.
04/08/2022, 10:07:58 AM	admin@eadl-ra.org	Info	System	Preparing to invoke runtime task implementation for variant [sfdc_internal_TCRM_T2A]
04/08/2022, 10:07:59 AM	admin@eadl-ra.org	Info	System	Runtime task node status changed from [EnqueuedStatus] to [InProgressSelfReportStatus]
04/08/2022, 10:07:59 AM	admin@eadl-ra.org	Info	System	Updated status message: Successfully updated folder [Learning Adventure] with id [00IRM000000nbRIYAY]
04/08/2022, 10:07:59 AM	admin@eadl-ra.org	Info	System	Runtime task node state updated.
04/08/2022, 10:08:00 AM	admin@eadl-ra.org	Info	System	Runtime task node status changed from [InProgressSelfReportStatus] to [CompleteStatus]

## Get Your Opportunity Details in a Snap with the New Customer Insights Opportunity Embedded Dashboard

Focus on the details about your opportunities in one convenient dashboard. You can see details, such as the probability of the opportunity, the deal age, and the current stage.

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

**Who:** The template is available to users with the CRM Analytics Growth and CRM Analytics Plus licenses.

**How:** In Analytics Studio, click **Create**, and select **App**. Find and select **Customer Insights**, and then follow the instructions in the wizard to create your app. Salesforce Admins can also install the Customer Insights app directly from Salesforce setup. Schedule recurring data refreshes manually from the Data Manager.



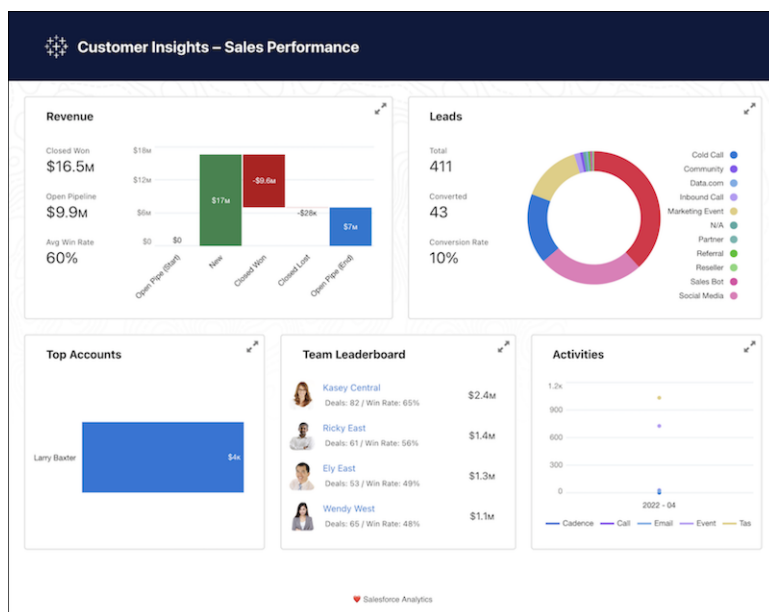
## Customize the New Customer Insights Sales Performance Dashboard with Ease

The Sales Performance dashboard shows how your sales are trending. The Customer Insights Sales Performance dashboard is designed for easy customization because it uses minimal SAQL and interactions (formerly called bindings). You can customize the dashboard or use it to understand best practices to design your own dashboard.

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**Who:** The template is available to users with the CRM Analytics Growth and CRM Analytics Plus licenses.

**How:** In Analytics Studio, click **Create**, and select **App**. Find and select **Customer Insights**, and then follow the instructions in the wizard to create your app. Salesforce Admins can also install the Customer Insights app directly from Salesforce setup. Schedule recurring data refreshes manually from the Data Manager.



## Get B2C Insights with Person Account Details in Customer Insights Datasets

Now the Customer Insights app can provide insights about Person accounts in the Opportunity dataset. Including the Person account allows you to perform analytics on your customer information, giving you a deeper understanding of your customers' experiences.

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

**Who:** The template is available to users with the CRM Analytics Growth and CRM Analytics Plus licenses.

**How:** In Analytics Studio, click **Create**, and select **App**. Find and select **Customer Insights**, and then follow the instructions in the wizard to create your app. Salesforce Admins can also install the Customer Insights app directly from Salesforce setup. Schedule recurring data refreshes manually from the Data Manager. You can see the Person account information in the Opportunity dataset.

## Monitor the Order Journey with Order Tracking Analytics

Minimize order fallout risks and improve SLA adherence with the new Order Tracking Analytics. Use these data-driven insights to monitor the order journey, identify the orders and tasks that require immediate attention, and plan preventive actions for orders predicted to fail.

**Where:** This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited Editions where B2B Communications Cloud is enabled.

**Who:** To create an app from the Order Tracking template, you need the CRMA for Comms App license.

**How:** Go to Analytics Studio, and then create your app by using the Order Tracking Analytics template.

## Analytics App Building

Explore and analyze Google BigQuery data without bringing it into Salesforce. Give dashboard users customized information when dynamic data doesn't show results. Filter Salesforce object and CDP data in dashboards more efficiently with global filters.

### IN THIS SECTION:

#### [Analyze Google BigQuery Data Directly \(Generally Available\)](#)

Skip the hassle of bringing Google BigQuery data into Salesforce and prepping it before you can explore and analyze it. With CRM Analytics 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. This feature, now generally available, includes support for binding functions in conjunction with the `bigquery` keyword.

#### [View Row, Column, and Grand Totals in Pivot Tables](#)

Get the metrics that reveal the big picture up front. For insights at a glance, add row totals, column totals, or both to pivot tables with at least two groupings in a lens or dashboard. When you select the row and the column totals, the pivot table shows the row and column grand totals.

#### [Perform One-Click Actions from Repeater Widgets](#)

Act on business insights directly from repeater widgets in CRM Analytics dashboards. When you add an actionable dataset field to a text widget in a repeater widget, the text in the widget becomes a one-click action.

#### [Give Feedback When Dynamic Fields Don't Return Results](#)

Let users know what's happening by presenting a custom text message when no results are returned in dynamic fields. Custom messages are available in dynamic text and chart fields used in repeater widgets and in dynamic measure fields used in a reference line.

### [Do More with Reusable Dashboard Components](#)

Now you can save time and create a consistent experience when using dashboard components. Create or search for dashboard components from the Analytics home page without opening a dashboard. The component designer now shows the size of the component relative to the full dashboard, to better show how much space the component requires. Filter widgets in components are able to extend over the component edges, so you can create a small, reusable filter widget that displays all the options of a larger one.

### [Improve Readability by Shortening Numbers in Your Dashboards](#)

Make it easier for users to view and understand the data in your dashboards. Instead of displaying all available numbers, show only what's needed. This feature applies to dynamic text and chart fields used in repeater widgets, and in dynamic measure fields used in a reference line.

### [Launch Explorations for Customer Data Platform with a Single Click](#)

Analyze and surface customer engagement patterns from Customer Data Platform data without switching to Analytics Studio and creating dashboard queries. With CRM Analytics Direct Data for CDP, marketing specialists can now explore calculated insights, data lake objects, and data models from the data object's record page. With CRM Analytics and Customer Data Platform enabled, they can review, profile, and trend data in explorer tables and charts, or run queries on it right in their business workflow.

### [Optimize Dashboard Performance with Global Filters on Salesforce Objects and CDP Data](#)

Hone in on a subset of Salesforce object records or CDP data without compromising on your dashboard's speed. 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 Salesforce account records, apply Region as the global filter to review trends across geographical areas.

### [Add Filters to External Data Sources in Embedded Dashboards](#)

Narrow the data shown in embedded dashboard tables and charts based on the Salesforce record context by using a filter. You can now apply filters to live datasets, Salesforce objects, and CDP data in embedded dashboards. Filter multiple widgets and components simultaneously in a Lightning page by the same measure, dimension, or date field. You can define filters using the Filter Builder or by entering the JSON strings in the Filter String box.

### [Facet SOQL Queries on the Same Salesforce Object with Ease](#)

Building interactivity into dashboard widgets based on Salesforce objects is now easier. Faceting between SOQL steps built on the same sObject is enabled by default on new steps. Previously, you used interactions or modified JSON to facet these steps. You can still enable faceting for existing SOQL steps or modify default settings on new SOQL steps from the query faceting settings.

### [Other Enhancements to CRM Analytics Explorer and Dashboards](#)

Learn about these enhancements to Analytics CRM Explorer and dashboards.

### [Accessibility Improvements in CRM Analytics Dashboards](#)

Screen readers can now read the alt text in dashboard image components. The List, Date, and Global Filter widgets are implemented as buttons so that screen readers can correctly identify them as actionable. The widget action menu supports accessible actions and narration. Filter lists support navigation using the up and down arrows.

### [SAQL and SQL](#)

Work with timeseries data in SQL with `FILL()` and `TIMESERIES()` functions. SAQL's `fill()` function forecasts data beyond your dataset's date range. Null handling in SAQL is generally available.

#### SEE ALSO:

[Retrieve Accessible PDFs with the Analytics Download API](#)



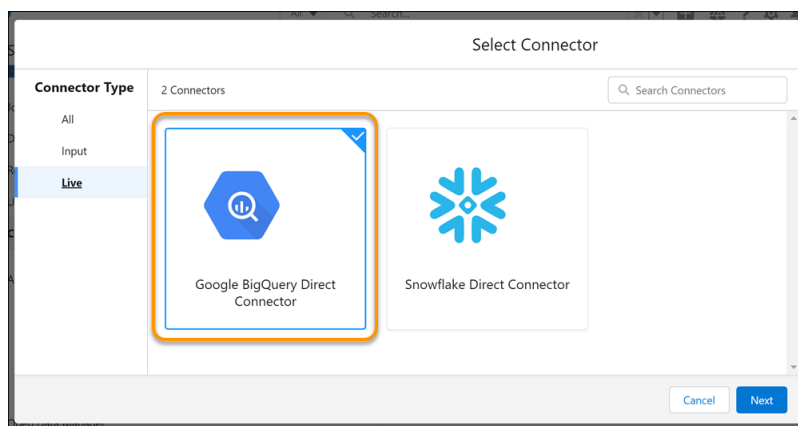
## Analyze Google BigQuery Data Directly (Generally Available)

Skip the hassle of bringing Google BigQuery data into Salesforce and prepping it before you can explore and analyze it. With CRM Analytics 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. This feature, now generally available, includes support for binding functions in conjunction with the `bigquery` keyword.

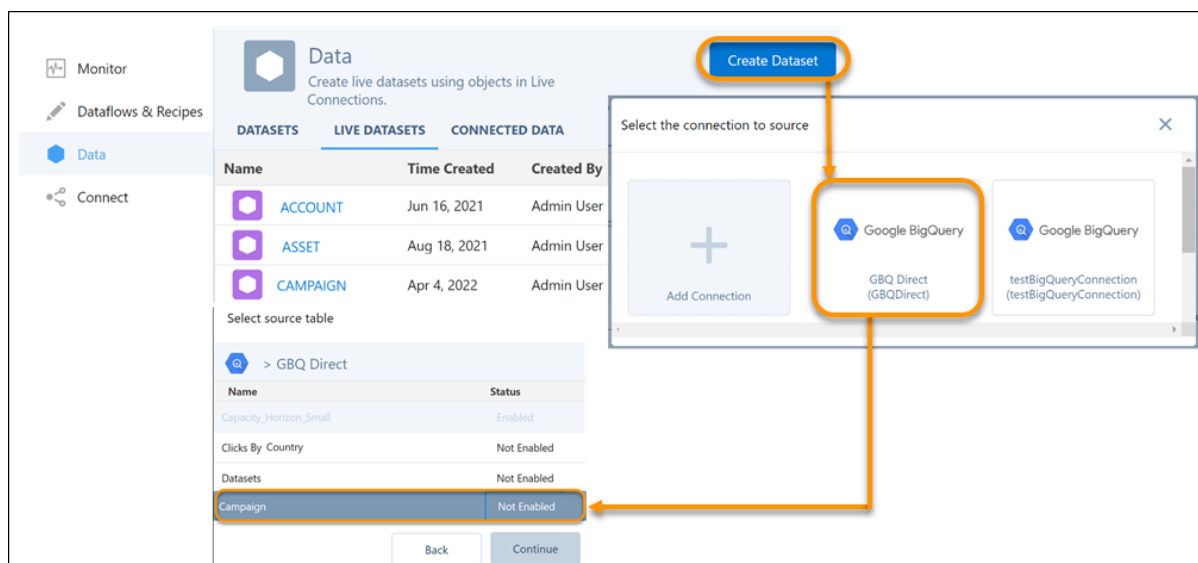
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Say you want to analyze your campaign data in Google BigQuery. From Setup, in the Quick Find box, enter **Analytics**, and then select **Settings**. Click **Enable Direct Data for external data sources**.

Open Data Manager (Legacy), and add a live connection using the **Google BigQuery Direct Connector** type.

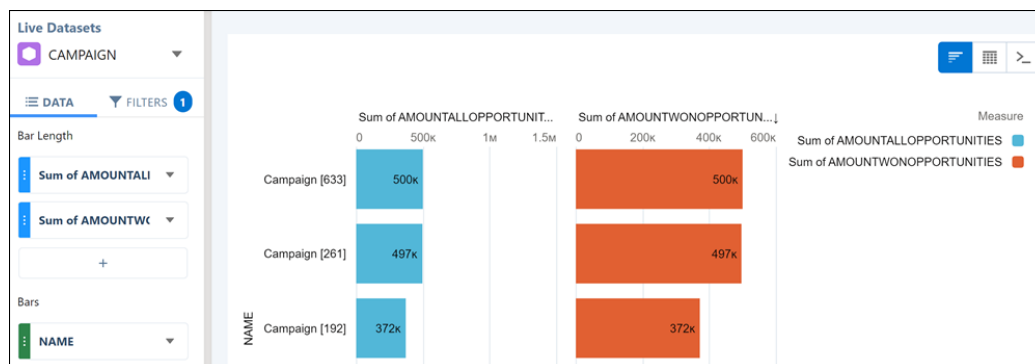


From the Data tab, create a live dataset and enable the campaign data source table that's available with the connection that you created.



Assign the live dataset to an Analytics app to control which Salesforce users, roles, and groups have access to explore the data with the connection.

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



## View Row, Column, and Grand Totals in Pivot Tables

Get the metrics that reveal the big picture up front. For insights at a glance, add row totals, column totals, or both to pivot tables with at least two groupings in a lens or dashboard. When you select the row and the column totals, the pivot table shows the row and column grand totals.

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

**How:** For example, your pivot table shows sales data grouped by region and then product category. To see total sales for each product category across all regions, click  $\Sigma$  (1), and then select **Show Column Totals** (2). To see sales totals for each region across all product categories, select **Show Row Totals** (3).

Product_Category	Total	Furniture	Office Supplies	Technology
Region	Sum of Sales	Sum of Sales	Sum of Sales	Sum of Sales
Total	8,951,931.32	3,178,623.74	2,258,325.55	3,514,982.03
Central	2,540,341.62	859,217.62	672,768.64	1,008,355.36
East	2,422,804.68	864,063.26	711,438.58	847,302.84
South	1,597,346.22	546,261.1	373,950.53	677,134.59
West	2,391,438.8	909,081.76	500,167.8	982,189.24

## Perform One-Click Actions from Repeater Widgets

Act on business insights directly from repeater widgets in CRM Analytics dashboards. When you add an actionable dataset field to a text widget in a repeater widget, the text in the widget becomes a one-click action.

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

**How:** In Analytics Studio, use the dataset editor to assign an action to the dataset field, such as opening a Salesforce record or invoking a Visualforce page.

 **Note:** Include the dataset row identifier, such as Record ID, in the value table to help locate the record.

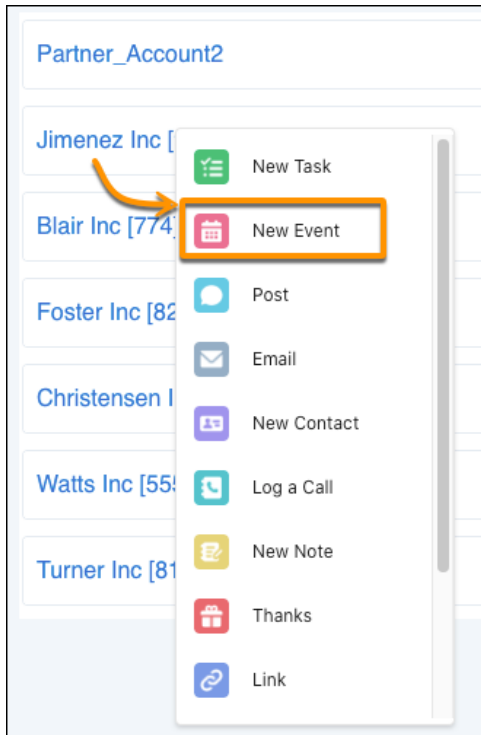
The screenshot shows the Salesforce dashboard builder interface. On the left, a sidebar lists various fields like Owner, Parent, Employees, Annual Revenue, Last Modified Date, Created Date, Account ID, and Account Name. The main area displays a table with columns: #, Days, Last Modified Date (Epoch seconds), Created Date (Epoch days), Account ID, and Account Name. The table contains six rows of data. On the right, a 'COLUMN' configuration panel is open for the 'Account Name' column. It shows options for Text Style (Regular), Conditional Formatting, and Actions. The 'Actions' section has a checkbox 'Set up one-click actions' which is checked. Below it, there are radio buttons for 'Open Actions Menu' (selected) and 'Select Action'. A callout box labeled '1' points to the 'Configure Actions' button in the bottom left of the table configuration area. Another callout box labeled '2' points to the 'Set up one-click actions' checkbox in the 'Actions' panel.

In the dashboard builder, open a lens and configure actions for the field (1) and column (2).

Then, in the dashboard builder, add the dataset field, such as Account\_Name, to a text widget inside a repeater widget.

The screenshot shows the 'Editing Repeater Content' interface. The main area displays a grid with a repeater widget containing a text field labeled 'Partner\_Account2'. On the right, a 'Widget' configuration panel is open. It shows the widget type as 'Text' and the ID as 'text\_1'. The 'Text' field is empty. Below the text field, there is a section for 'Add Query Data' with a dropdown menu set to '16'. Below that, there are buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and Link (I\_x). A callout box labeled '1' points to the '[Account\_Name]' field in the configuration panel.

Now you can act directly from your dashboard. For example, create an event directly from an account.



## Give Feedback When Dynamic Fields Don't Return Results

Let users know what's happening by presenting a custom text message when no results are returned in dynamic fields. Custom messages are available in dynamic text and chart fields used in repeater widgets and in dynamic measure fields used in a reference line.

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

**How:** When adding query data to the widget, select **Customize message for no results** and add the text message.

**Text Widget** [X]

**Dynamic Data Source**  
Choose a query to use as a data source for your dynamic values.

Select Query

**Dynamic Text Field**  
Choose a field to display as the dynamic value in your text widget. Each column in the data table represents a field.

Select Field ▼

**Customization**

☒ Customize message for no results

Message

No Results Found

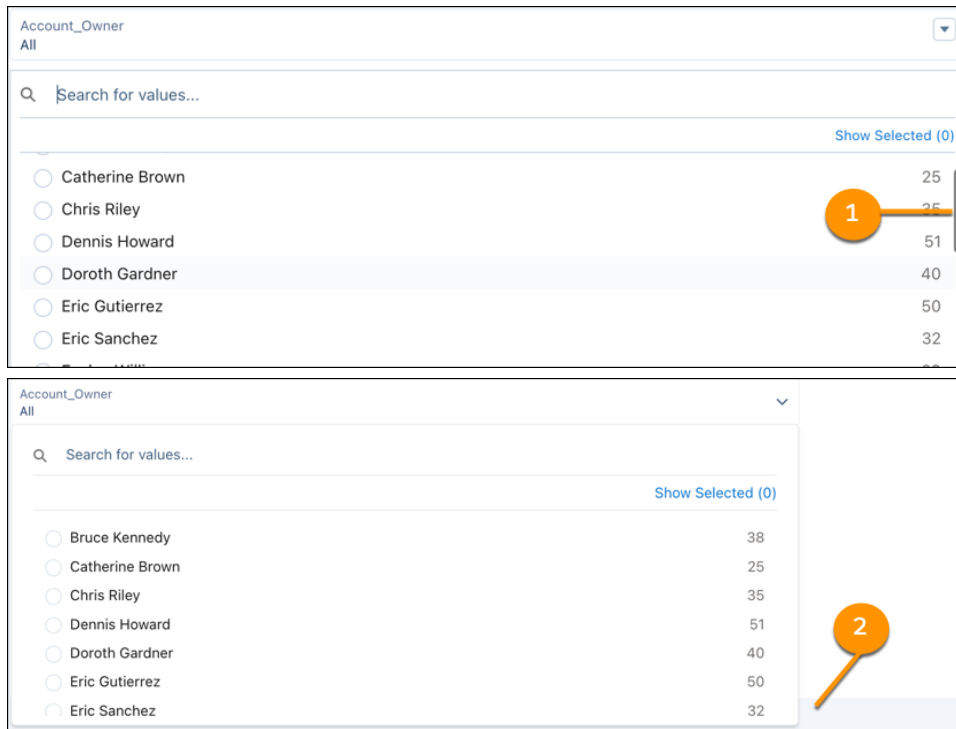
Interaction Type

## Do More with Reusable Dashboard Components

Now you can save time and create a consistent experience when using dashboard components. Create or search for dashboard components from the Analytics home page without opening a dashboard. The component designer now shows the size of the component relative to the full dashboard, to better show how much space the component requires. Filter widgets in components are able to extend over the component edges, so you can create a small, reusable filter widget that displays all the options of a larger one.

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

**How:** Filter widgets are no longer bound within the component (1), they intuitively use the space and overlap (2) the component.



## Improve Readability by Shortening Numbers in Your Dashboards

Make it easier for users to view and understand the data in your dashboards. Instead of displaying all available numbers, show only what's needed. This feature applies to dynamic text and chart fields used in repeater widgets, and in dynamic measure fields used in a reference line.

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

**How:** When adding query data to the widget, select Shorten number to shorten the dynamic value. For example, this setting shortens the label in a chart reference line from \$2,345,217.32 to \$2.3M.

**Reference Line Label Interaction** X

**Dynamic Data Source**  
Choose a query to use as a data source for your dynamic values.

static\_2

**Reference Line Label**  
Create your own label using custom text or fields from the dataset.

Select Field ▼

Display

Number2

**Customization**

☒ Shorten number

**Interaction Type**  
Choose whether the dynamic field shows values based on what's selected in the dashboard or the total result of the underlying query data.

☐ Result ⓘ

☒ Selection ⓘ


## Launch Explorations for Customer Data Platform with a Single Click

Analyze and surface customer engagement patterns from Customer Data Platform data without switching to Analytics Studio and creating dashboard queries. With CRM Analytics Direct Data for CDP, marketing specialists can now explore calculated insights, data lake objects, and data models from the data object's record page. With CRM Analytics and Customer Data Platform enabled, they can review, profile, and trend data in explorer tables and charts, or run queries on it right in their business workflow.


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

**Who:** CRM Analytics Direct Data for CDP is available to users with a Customer Data Platform license.

**How:** To review spending by product subcategories in a funnel chart, in the Calculated Insights tab, click the calculated insight built on product clusters.

Salesforce CDP   Home   Data Lake Objects   Data Model   Calculated Insights   Data Actions					
 <b>Calculated Insights</b> <b>Recently Viewed</b>					
30 items • Updated 30 minutes ago					
	Calculated Insight Name	Status	Last Run Time	Created By	Created Date
1	<a href="#">Total Price by customer</a>	Active	7/5/2022, 10:22 AM	prama	9/14/2021, 11:25 PM
2	<a href="#">Product Cluster Insight</a>	Active	7/5/2022, 9:15 AM	AUser	6/15/2022, 11:54 AM
3	<a href="#">Real Time Geofence Insight</a>	Active	7/4/2022, 4:58 PM	AUser	9/24/2021, 10:35 AM
4	<a href="#">Account Insights</a>	Active	7/5/2022, 9:15 AM	AUser	9/30/2021, 1:35 PM
5	<a href="#">Total Cross-Channel Engagement</a>	Active	7/5/2022, 9:15 AM	AUser	6/10/2021, 12:10 PM

From the insight's record page, click **Explore in Analytics**.


**Calculated Insight**  
**Product Cluster Insight**

[+ Follow](#)
[Explore in Analytics](#)
[Edit](#)
[Disable](#)

Status  
Active

Last Run Time  
7/6/2022, 5:45 AM

Last Run Status  
Success

**Details**
Expression

**Fields**

	Field Name	Field API Name	Data Type	Field Type
1	product category	product_category_c	Text	Dimension
2	product id	product_id_c	Number	Dimension
3	spend	spend_c	Number	Metric(Aggregatabl...
4	order date	order_date_c	DateTime	Dimension
5	order count	order_count_c	Number	Metric(Aggregatabl...
6	product name	product_name_c	Text	Dimension
7	product sub catego...	product_sub_categ...	Text	Dimension

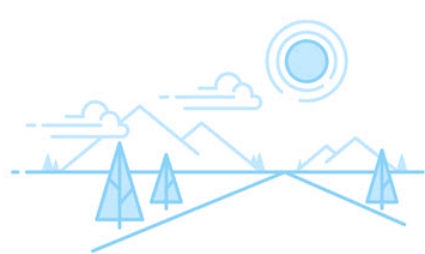
Calculated Insight Name  
Product Cluster Insight

Calculated Insight API Name  
product\_cluster\_insight\_cio

Post
Poll
Question

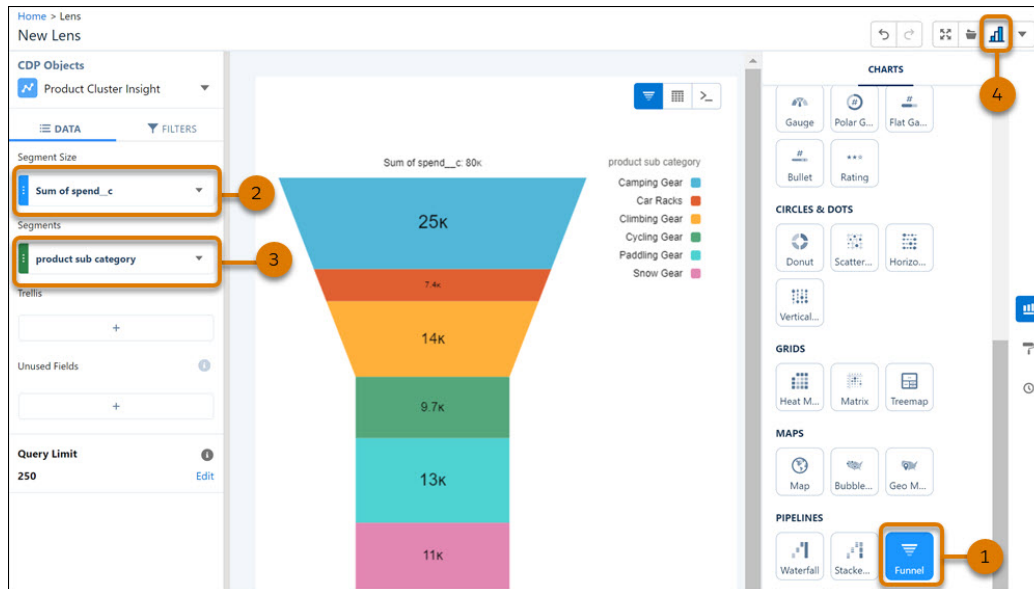
Share an update...
Share

Search this feed...



From the chart gallery, select **Funnel** (1). Aggregate the data by amount spent (2). Group data by product subcategory (3). To save your lens or clip it to a dashboard, switch to Analytics Studio (4).



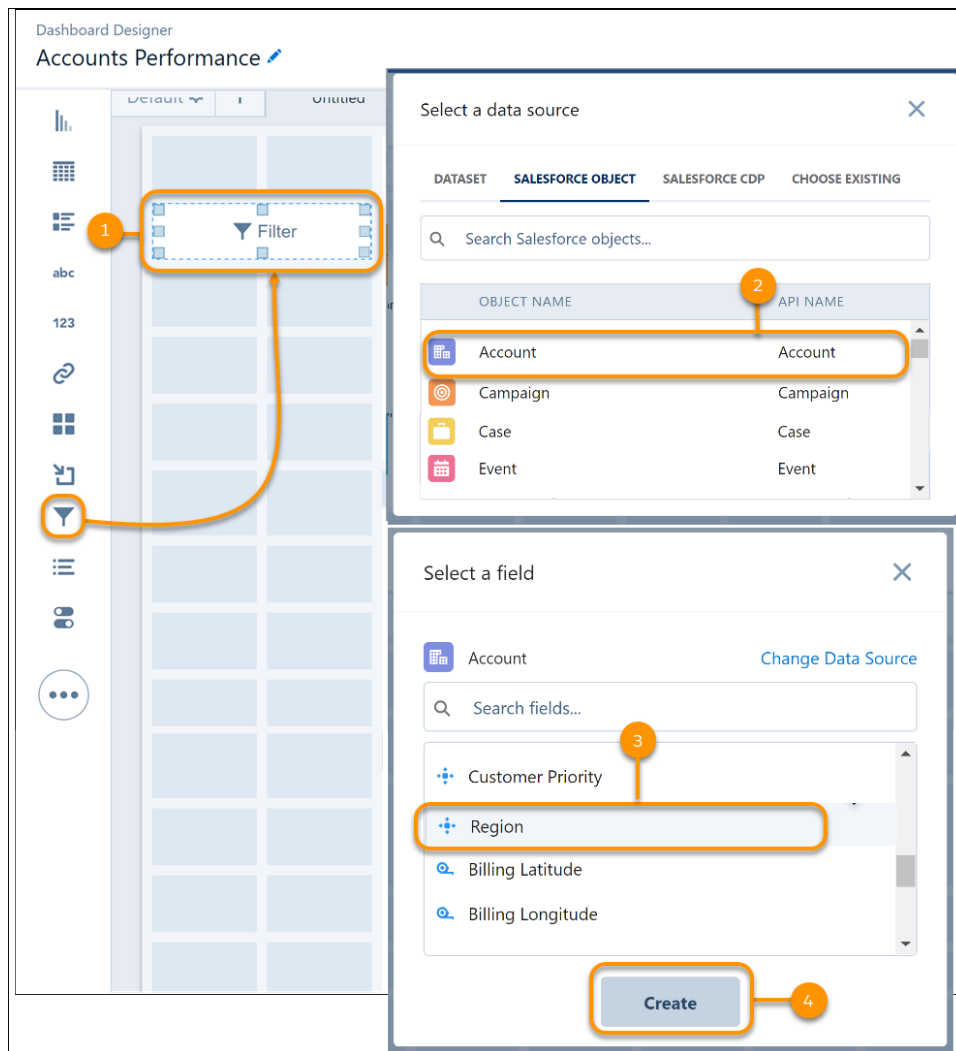


## Optimize Dashboard Performance with Global Filters on Salesforce Objects and CDP Data

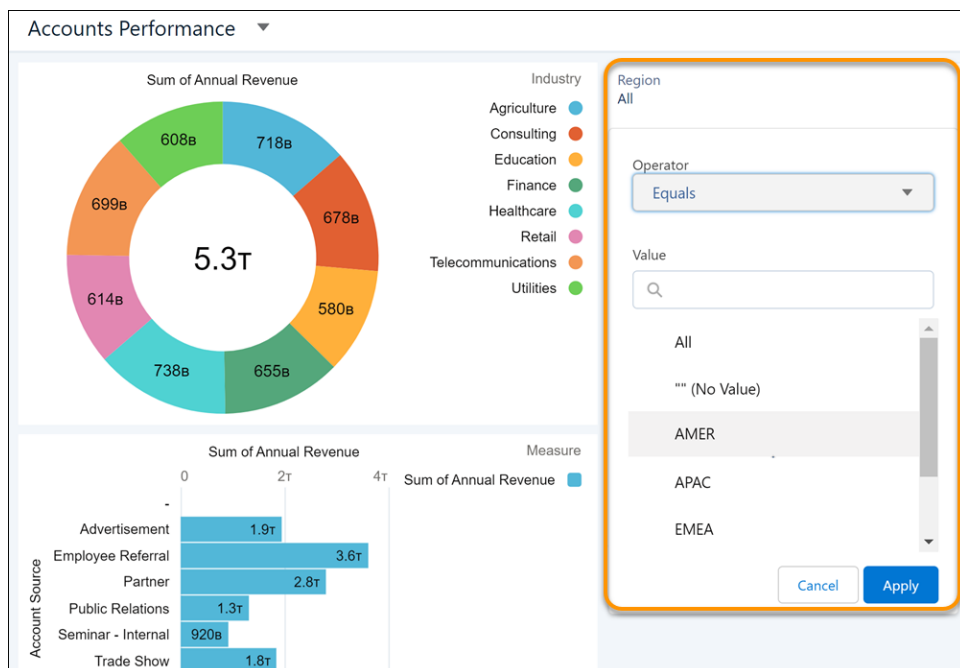
Hone in on a subset of Salesforce object records or CDP data without compromising on your dashboard's speed. Add a global filter to dashboards with live data from these data sources to efficiently filter queries and widgets by the same field. For example, on a dashboard that's set up to monitor Salesforce account records, apply Region as the global filter to review trends across geographical areas.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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 Salesforce object field or CDP as the data source (2). Then specify the field to use as the global filter (3). Click **Create** (4). Save the dashboard.



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

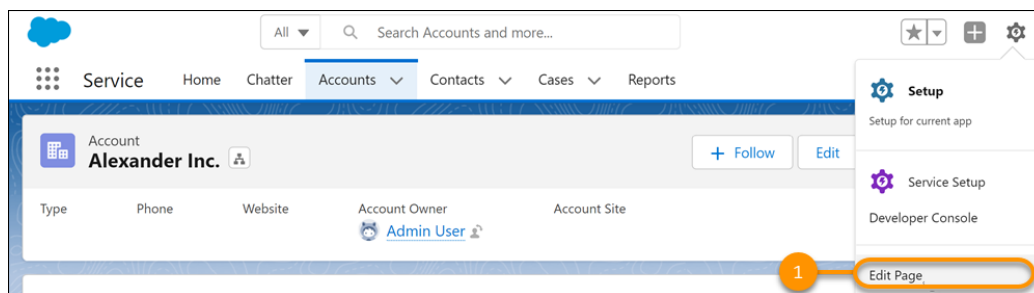


## Add Filters to External Data Sources in Embedded Dashboards

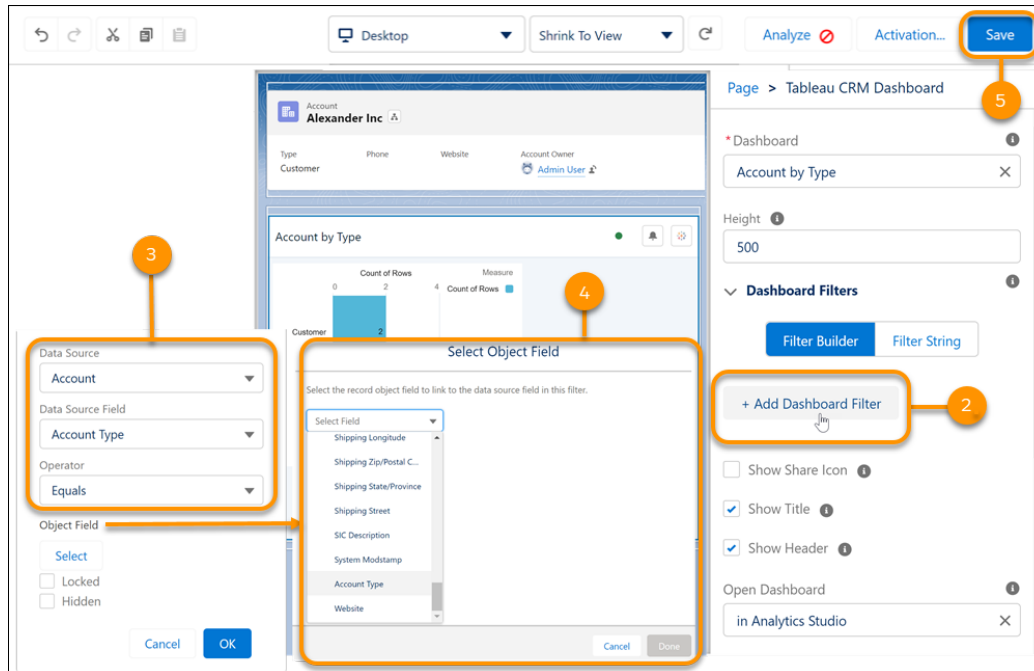
Narrow the data shown in embedded dashboard tables and charts based on the Salesforce record context by using a filter. You can now apply filters to live datasets, Salesforce objects, and CDP data in embedded dashboards. Filter multiple widgets and components simultaneously in a Lightning page by the same measure, dimension, or date field. You can define filters using the Filter Builder or by entering the JSON strings in the Filter String box.

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

**How:** From Setup on a Lightning record page, click **Edit Page** (1).



With the embedded dashboard selected, click **Add Dashboard Filter** (2) in the Filter Builder. Specify the data source, field, and the operator for the filter (3). Alternatively, enter JSON strings in the Filter String box of the embedded dashboard. Set the field in the record page that you want to associate with the filter field (4). Save your changes (5).

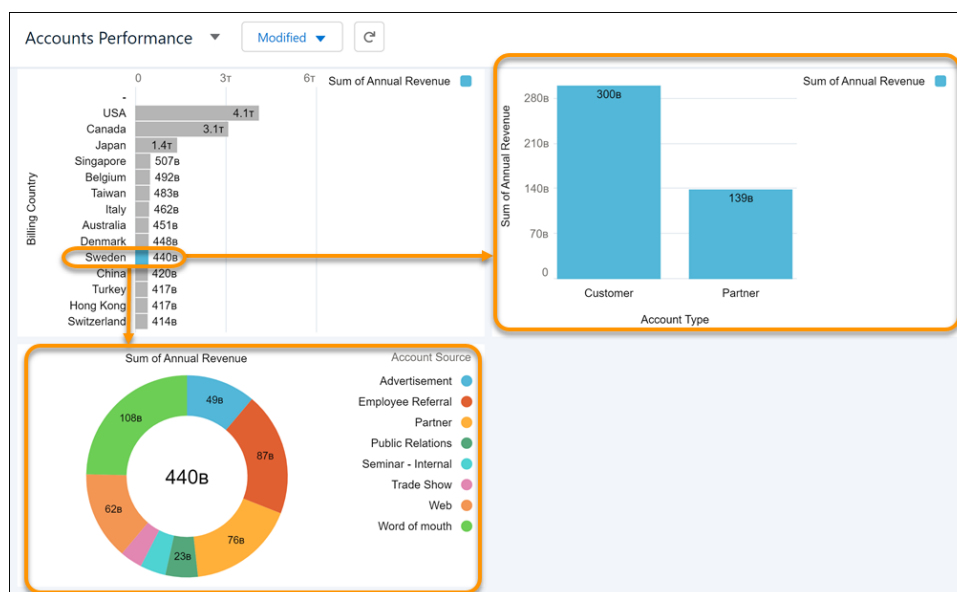


## Facet SOQL Queries on the Same Salesforce Object with Ease

Building interactivity into dashboard widgets based on Salesforce objects is now easier. Faceting between SOQL steps built on the same sObject is enabled by default on new steps. Previously, you used interactions or modified JSON to facet these steps. You can still enable faceting for existing SOQL steps or modify default settings on new SOQL steps from the query faceting settings.

**Where:** These changes apply to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**Why:** Say your dashboard includes separate charts to show accounts by country, source, and type. With faceting enabled, select a country in the chart to see the breakdown of accounts by type and source for that country.



Because faceting between SOQL queries built across different sObjects isn't supported, continue using interactions or modifying the dashboard JSON for cross-object faceting in such cases.

## Other Enhancements to CRM Analytics Explorer and Dashboards

Learn about these enhancements to Analytics CRM Explorer and dashboards.

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

### Group Data by up to 10 Fields In Explorer

You can now group your data by up to 10 dimensions or date fields in explorer charts and tables, except in blended queries. Previously, you edited SAQL queries or JSON files to include more than six groupings for your data.

### Include up to Six Datasets in a Single Query

To extend your explorations, you can blend up to six datasets in a lens or dashboard widget.

### Configure the Query Limit in Explorer and Dashboard Widgets

To get more flexibility when exploring data, you can configure the maximum limit for query results in the explorer and dashboard widgets. Previously, the query limit was 10,000. To configure the maximum query limit, contact Salesforce Customer Support.

## Accessibility Improvements in CRM Analytics Dashboards

Screen readers can now read the alt text in dashboard image components. The List, Date, and Global Filter widgets are implemented as buttons so that screen readers can correctly identify them as actionable. The widget action menu supports accessible actions and narration. Filter lists support navigation using the up and down arrows.

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

## SAQL and SQL

Work with timeseries data in SQL with `FILL()` and `TIMESERIES()` functions. SAQL's `fill()` function forecasts data beyond your dataset's date range. Null handling in SAQL is generally available.

## IN THIS SECTION:

[Fill Extends Date Range Limits](#)

SAQL's `fill()` function can now fill in values outside the bounds of your data's date range. Specify a start date and end date to override existing limits. The function returns the missing date rows with null values. Use `fill()`'s start and end functionality with `timeseries()` to forecast dates before and after a given date range.

[Fill Gaps in Date Fields with SQL FILL\(\)](#)

Use the `FILL()` table function to fill in gaps. `FILL()` creates a row that contains the missing day, week, month, quarter, or year and includes a null value. Use it with `TIMESERIES()` to forecast future results when there are gaps in input data.

[Forecast Future Data with SQL TIMESERIES\(\)](#)

Use the `TIMESERIES()` table function to predict future values based on existing ones tracked over time. Optionally choose a prediction model, confidence interval, and seasonality among other parameters.

[Achieve Greater Query Accuracy with Null Handling for Dimensions \(Generally Available\)](#)

Now you can include null dimensions in your datasets. This feature is distinct from the null handling for measures preference. Previously, SAQL queries were limited to non-null values only.

**Fill Extends Date Range Limits**

SAQL's `fill()` function can now fill in values outside the bounds of your data's date range. Specify a start date and end date to override existing limits. The function returns the missing date rows with null values. Use `fill()`'s start and end functionality with `timeseries()` to forecast dates before and after a given date range.

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

**How:** `fill()` takes this syntax.

```
results = fill resultSet by (dateCols=dateField1, dateField2, "<date format>"),
startDate=startDate, endDate=endDate, [partition])
```

Here's a simple example that fills in missing dates from outside the dataset's date range.

```
q = load "forecastdata";
q = foreach q generate date_Year, date_Month, tourists;
q = fill q by (dateCols=(date_Year, date_Month, "Y-M"), startDate="2000-10",
endDate="2001-07");
q = limit q 10;
```

The query returns null values for tourists where `date_Month` and `date_Year` come before or after the date values in the dataset or there are gaps within the data provided.

date_Month	date_Year	tourists
10	2000	-
11	2000	-
12	2000	-
01	2001	41,735
02	2001	-
03	2001	-

date_Month	date_Year	tourists
04	2001	26,665
05	2001	-
06	2001	-
07	2001	-

SEE ALSO:

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

### Fill Gaps in Date Fields with SQL `FILL()`

Use the `FILL()` table function to fill in gaps. `FILL()` creates a row that contains the missing day, week, month, quarter, or year and includes a null value. Use it with `TIMESERIES()` to forecast future results when there are gaps in input data.

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

**How:** This example uses `FILL()` to add missing month values to data that can be used to predict how many tourists are likely to visit a city within a month.

```
SELECT * FROM FILL(
  INPUT=>(
    SELECT EXTRACT(YEAR FROM "date") AS date_Year, EXTRACT(MONTH FROM "date") AS date_Month,
    SUM(tourists) AS sum_tourists
    FROM "TouristsData"
    WHERE EXTRACT(YEAR FROM "date") >= 2007
    GROUP BY EXTRACT(YEAR FROM "date"), EXTRACT(MONTH FROM "date")
  ),
  DATE_COLS=>ARRAY['date_Year', 'date_Month', 'Y-M']
)
```

date (Year)	date (Month)	Sum of tourists
2007	2	187.19
2007	3	-
2007	4	-
2007	5	-
2007	6	-
2007	7	-
2007	8	-
2007	9	-
2007	10	-
2007	11	-

date (Year)	date (Month)	Sum of tourists
2007	12	-
2008	1	-
2008	2	-

SEE ALSO:

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

## Forecast Future Data with SQL **TIMESERIES ()**

Use the **TIMESERIES ()** table function to predict future values based on existing ones tracked over time. Optionally choose a prediction model, confidence interval, and seasonality among other parameters.

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

**How:** This example predicts annual number of tourists for three years based on available data for previous years. First, it sums up the number of annual tourist visits from 2001 through 2008. To forecast future data points with **TIMESERIES ()**, the date data can't have any gaps. Otherwise, **TIMESERIES ()** returns an error. To fill in the gaps, the **FILL ()** function takes the input of the annual tourist sums and fills in the gaps (if any) in date fields. **TIMESERIES ()** takes the input from the **FILL ()** function and predicts the number of tourists expected for the specified length. Here, **LENGTH** is set to 3, meaning three years. **IGNORE\_LAST** is set to **TRUE** to exclude the last row for 2008 in timeseries calculations. **TIMESERIES ()** predicts values from 2008–2010.

```
SELECT * FROM TIMESERIES (
  INPUT=>(
    SELECT * FROM FILL(
      INPUT=>(
        SELECT EXTRACT(YEAR FROM "date") AS date_Year, SUM(tourists) AS sum_tourists

        FROM "TouristsData"
        GROUP BY EXTRACT(YEAR FROM "date")
      ),
      DATE_COLS=>ARRAY['date_Year', 'Y']
    )
  ),
  FIELDS=>ARRAY['sum_tourists'],
  LENGTH=>3,
  DATE_COLS=>ARRAY['date_Year', 'Y'],
  IGNORE_LAST=>TRUE
)
```

date (Year)	predicted_sum_tourists	Sum of tourists
2001	13,008	13,140
2002	13,964	13,543
2003	14,934	15,502
2004	15,894	15,822



date (Year)	predicted_sum_tourists	Sum of tourists
2005	16,855	16,784
2006	17,816	17,713
2007	18,777	18,719
2008	19,738	-
2009	20,700	-
2010	21,662	-

SEE ALSO:

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

### Achieve Greater Query Accuracy with Null Handling for Dimensions (Generally Available)

Now you can include null dimensions in your datasets. This feature is distinct from the null handling for measures preference. Previously, SAQL queries were limited to non-null values only.

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

**How:** To enable the null handling for dimensions preference, contact Salesforce Customer Support. From Setup, in the Quick Find box, enter *Analytics*, select **Settings**, and then select **Include null values in CRM Analytics queries**.

The screenshot shows the 'Include null values in Tableau CRM queries' checkbox checked. A yellow tooltip message reads: 'Queries ignore null values by default. To include null values in queries, enable this setting and then refresh your datasets.'

Here's an example of using the SAQL `group-by` function with the null handling preference enabled.

```
q = load "Superstore";
q = group q by 'Sub_Category';
q = foreach q generate 'Sub_Category' as 'Sub_Category', count() as 'count';
q = order q by 'Sub_Category' asc nulls first;
q = limit q 2000;
```

The first value that the query returns is a grouped count of four null rows.

Sub-Category	Count of Rows
-	4
Accessories	775
Appliances	466
Art	796
Binders	1,523
Bookcases	228

Sub-Category	Count of Rows
Chairs	617
Copiers	68
Envelopes	254
Fasteners	217
Furnishings	957
Labels	364
Machines	115
Paper	1,370
Phones	889
Storage	846
Supplies	190
Tables	319

## Einstein Discovery

Reveal untapped insights from your unstructured data with text clustering. Fine-tune prediction accuracy with trending data. Handle missing values in your datasets.

### IN THIS SECTION:

#### [Reveal Untapped Insights In Your Unstructured Data \(Generally Available\)](#)

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. Low information words such as “a” or “the,” surfaces prominent words, and buckets them into clusters. As a result, unstructured data gets reduced to its top keywords which enables you to quickly reveal hidden insights and improve decision making.

#### [Fine-Tune Prediction Accuracy with Trending Data \(Generally Available\)](#)

With projected predictions in Einstein Discovery, now you can provide trending data for numeric variables that factor into your predictions to make them more accurate.

#### [Handle Missing Values in Your Datasets \(Generally Available\)](#)

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

#### [Save Higher Volumes of Predictions More Quickly \(Pilot\)](#)

For models that are deployed using automated prediction fields, customers are currently allowed up to 500,000 predictions per org per day. For companies that generate predictions that approach or exceed this limit, use high-volume writeback to quickly save larger quantities of predicted values. High-volume writeback decreases the time it takes to write predictions and avoids row locks related to other processes that might be going on. The default prediction limit is 2 million. Use Einstein Prediction Service to retrieve up to 30 days of prediction history.

### [Manage Predictions More Easily With Enhanced Settings Panels](#)

Configuring prediction definitions and predictions is easier with an updated interface in Model Manager. The Settings tab is now a panel that shows current settings, and you can change them by launching a configuration wizard.

### [Package, Promote, and Distribute Your Stories \(Pilot\)](#)

With packaging support, Einstein Discovery makes your stories more portable and shareable. Now you can create your story in a sandbox and, when it's production ready, promote it to production by using change sets. You can also create stories and distribute them within or outside your company using managed or unmanaged packages. Customers use the packaged assets and their own data to create the story in their environment and generate insights. Einstein Discovery supports first-generation packaging (1GP) and second-generation packaging (2GP).

### [Expedite Coding with a New Dev Guide](#)

There's a new dev doc in town: the Einstein Discovery REST API Developer Guide. Now you have a comprehensive, centralized reference for Einstein Discovery REST API endpoints, including new endpoints for retrieving model metrics. This guide consolidates the previous dev docs for Einstein Prediction Service and Insights API, making it easier than ever to interact programmatically with Einstein Discovery stories, insights, and models.

### [Get Predictions Using Externally Built Models in Bulk Scoring and Async Apex](#)

Extend the reach of your externally built machine learning models with new ways to distribute predictions to your users. You get predictions in Lightning pages, Einstein Prediction Service, and Einstein Discovery in Tableau. Now you can use these models to derive predictions in bulk scoring jobs and Async Apex. And now there's library support for Python 3.7.4 and Tensorflow 2.7.0.

### [Handle Data Quality Issues During Story Creation](#)

Einstein Discovery now alerts you of data quality issues before a story runs rather than after. Previously, you needed a completed story to reveal data quality issues that exist in your data, repair the issue, then run the story again. Einstein Discovery automatically detects data inconsistencies in training model variables so you can immediately view and address issues as they occur.

### [Minimize Disparate Impact in Live Data \(Pilot\)](#)

When production data deviates from the training model, bias can occur. Einstein Discovery now alerts you when disproportion exists within a sensitive variable, which helps you mitigate its distorting effects on your analysis and predictions in live data.

### [Uncover Bias in Multiclass Models](#)

Einstein Discovery now includes bias detection for multiclass models, which helps you root out bias by variable rather than retraining an entire model. In addition to knowing that your multiclass models can flag bias, you can now use multiclass more often and expand your use case options.

### [Date Variable Transformations Updates](#)

Einstein Discovery no longer supports Trend Options and simultaneous analysis of Day of Week and Month of Year transformations on a single date variable. Stories with both time transformations applied to one date variable automatically default to the Month of Year transformation. An option for concurrent analysis on a date field can be achieved by duplicating the date field, which can be achieved with Data Recipes, then applying Day of Week to the date field and Month of Year to its duplicate. Trending data over time is still supported in CRM Analytics Dashboards.

### [Get Report Insights in More Languages](#)

Report insights are now available in the supported languages enabled on your org.

### [Handle Missing Numerical Values in Your Datasets](#)

Too many missing values from unknown or problem data can lower the quality of your model. With Einstein Discovery, you can now allow you to impute missing numerical values in your dataset. Enable statistical imputation on a numeric variable, and then Einstein Discovery automatically replaces missing values with values derived from another subset of your data.

## SEE ALSO:

[Einstein Release Notes](#)

## Reveal Untapped Insights In Your Unstructured Data (Generally Available)

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. Low information words such as “a” or “the,” surfaces prominent words, and buckets them into clusters. As a result, unstructured data gets reduced to its top keywords which enables you to quickly reveal hidden insights and improve decision making.

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

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

The screenshot shows the Tableau CRM Analytics Studio interface. The main panel displays a table of variables for the story 'Case Time to Resolution'. The 'Transform' menu is open, showing 'Text Clustering' selected. The 'Include Only' section shows a list of clusters with their respective counts. A preview bar chart is also visible.

Variables (10 of 12 Included)	Correlation ↓
Hours to Resolution	N/A
Owner Case Count	18.7%
Escalated	14.8%
Status	10.3%
Functional Area	7.6%
Closed Date	5.2%
Severity Level	5.1%
Case Origin	4.1%
Description	2.2%
Industry	1.5%

**Transform**

1. Transform

2. Include Only

Search clusters...

Clusters	% ↓
analytics, data, dashboard	62
dataflow, error, message	9
custom, report, email	6
reports, report, access	5
view, list view, list	4
data, case, dashboard	3

**Preview**

Percentage

75%  
60%  
45%  
30%  
15%  
0

dashboard  
message  
report, email  
report, access  
list view, list  
dataflow, error  
analytics, data  
reports, report  
view, list view  
data, case

Clusters of rows show the top three keywords for each cluster (2). You can uncheck clusters to filter them into an “Other” category.

## Fine-Tune Prediction Accuracy with Trending Data (Generally Available)

With projected predictions in Einstein Discovery, now you can provide trending data for numeric variables that factor into your predictions to make them more accurate.

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

**Why:** Trend-adjusted predictions improve decision-making. For example, you predict opportunity win/loss based on expected price fluctuations for raw materials. To factor price into your predicted outcome, provide a dataset that projects the expected price for raw materials on the close date.

**How:** During story setup, select a numeric variable that changes over time and from the Settings tab under **Transform**, select **Projected Predictions** and then select the trend dataset that contains historical data for this variable.

The screenshot shows the 'Trend Dataset' selection panel on the left, which is highlighted with an orange border. It contains a search bar and a list of datasets: 'Customers with Score', 'Case Closure New', 'winloss\_1', and 'Attrition1'. On the right, the 'Transform' panel is visible, showing a dropdown menu for 'Projected Predictions' and a checkbox for 'Projected Predictions' which is checked and highlighted with an orange border. Below this, there are settings for 'Replace Missing Values' (set to 'None'), 'Bucket Values By' (set to 'Count'), 'Number of Buckets' (set to 10), and 'Include Only' (with 'Starting Value' at 0.88 and 'Ending Value' at 76.34).

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 then specify seasonality if applicable.

The screenshot shows the 'Trend Dataset' configuration panel on the left, which is highlighted with an orange border. It includes fields for 'Unique Identifier Column', 'Likelihood to Churn Column', and 'Time Interval Column', each with a search bar. Below these are 'Time Interval' (set to 'Select time interval...') and 'Number of Intervals to Project Ahead' (set to 1). The 'Seasonality' dropdown is set to 'Auto'. At the bottom are 'Cancel' and 'Apply' buttons. On the right, the 'Transform' panel is visible, showing the same settings as the previous screenshot. Below the 'Transform' panel is a 'Histogram' showing the distribution of the 'range' variable, with a peak count of 2.8k and a range from 0.88 to 76.34.

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 (Generally Available)

With automatic imputation of categorical fields you can handle missing dataset values without code or deleting rows of useful data. During story setup, Einstein Discovery employs a feature engineering process that uses available data from other training model variables to predict the missing values. 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 CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** In story settings, select the variable with the Replace Missing Values alert. (1). Select the **Replace Missing Values** (2) transformation, and click **Update Story**.

**Lead Conversion** Maximize Converted: True • Version 1 (Created Today at 2:03 PM)

Story Settings Search variables

Variables (9 of 12 Included)	Correlation ↓	Alerts	Transformations	Filters
Converted <b>Maximize</b>	N/A			
Lead Quality	24.1%	Multicollinearity X		
# Total Time on Website	19.9%			
Lead Profile	18.0%	Multicollinearity X		
Lead Sub Source	12.2%	Replace Missing Values X		
State	10.9%			
# Activity Score	10.4%	Missing Values X		
Lead Source	10.3%	Suggested Buckets X		
Industry	8.8%			
# Total Visits	0.7%			
Through Recommendations	0.1%	High Frequency Values X		
Sales Notes				

**Lead Sub Source**

☐ Analyze for bias ⓘ

**1. Transform ⓘ**

Replace Missing Values ▼

**2. Include Only**

Values	Count ↓
Google	1,878
Direct Traffic	1,403
Chat	1,365
Organic Search	668
Reference	231
Website	121
Referral Sites	91
Facebook	40

**Preview**

Count

2K

1K

0

Google Traffic Chat Search Refence Website Ref Sites Facebook

## Save Higher Volumes of Predictions More Quickly (Pilot)

For models that are deployed using automated prediction fields, customers are currently allowed up to 500,000 predictions per org per day. For companies that generate predictions that approach or exceed this limit, use high-volume writeback to quickly save larger quantities of predicted values. High-volume writeback decreases the time it takes to write predictions and avoids row locks related to other processes that might be going on. The default prediction limit is 2 million. Use Einstein Prediction Service to retrieve up to 30 days of prediction history.

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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:** To participate in the pilot program, contact your Salesforce Account Executive.

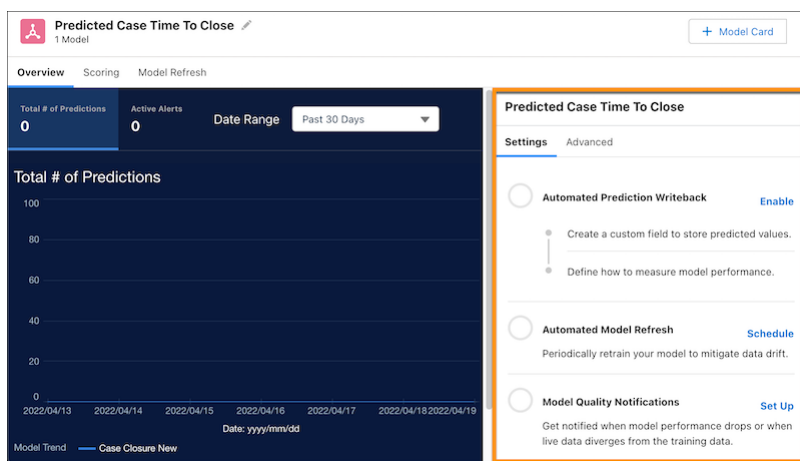
If high-volume writeback is enabled, Einstein Discovery retains only 30 days of prediction history instead of forever. The saved data is not compatible with the Einstein Accuracy Analytics app, nor is it retrievable via SOQL queries—only via Einstein Prediction Service.

## Manage Predictions More Easily With Enhanced Settings Panels

Configuring prediction definitions and predictions is easier with an updated interface in Model Manager. The Settings tab is now a panel that shows current settings, and you can change them by launching a configuration wizard.

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

**How:** Open Model Manager and select a prediction definition or a prediction. The settings panel shows the status of each setting.




To configure a setting, click the associated link. For example, for Automated Prediction Writeback, click **Enable**, and Model Manager walks you through the configuration steps.

The screenshot shows a configuration wizard titled 'Create an Automated Prediction Writeback Field'. The wizard prompts the user to 'Create a custom field to store predicted values for use in Salesforce reports, list views, and elsewhere. [Learn more](#)'. There are three radio button options: 'Create a prediction field', 'Use an existing prediction field', and 'Don't store predictions' (which is selected). At the bottom, there are three buttons: 'Cancel', 'Save', and 'Save & Next'.

## Package, Promote, and Distribute Your Stories (Pilot)

With packaging support, Einstein Discovery makes your stories more portable and shareable. Now you can create your story in a sandbox and, when it's production ready, promote it to production by using change sets. You can also create stories and distribute them within or outside your company using managed or unmanaged packages. Customers use the packaged assets and their own data to create the story in their environment and generate insights. Einstein Discovery supports first-generation packaging (1GP) and second-generation packaging (2GP).

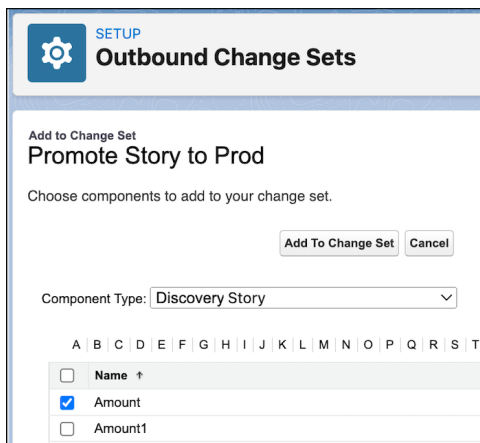
**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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**How:** To participate in the pilot program, contact your Salesforce Account Executive.

To promote a story from your sandbox environment to production, use a change set. From Setup, in the Quick Find box, enter `change set`, and then select **Outbound Change Sets**. To create an outbound change set, click **New**, enter a name and description, then save your changes.

To add the story to the change set, click **Add** and select the type of component that you want to deploy: **Discovery Story**.



**SETUP**  
**Outbound Change Sets**

Add to Change Set  
**Promote Story to Prod**

Choose components to add to your change set.

Component Type: Discovery Story

A B C D E F G H I J K L M N O P Q R S T

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Amount
<input type="checkbox"/>	Amount1

Select one or more stories to the list, and then click **Add To Change Set**. Add datasets and other assets associated with the selected stories, such as recipes and apps. Click **View/Add Dependencies**, select the assets, and then click **Add To Change Set**. Upload the change list to the target production environment. Then go to that environment, navigate to **Inbound Change Sets**, find the change set you uploaded, and then deploy it. Populate the dataset with your data, create the story, and explore its insights.

SEE ALSO:

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

## Expedite Coding with a New Dev Guide

There's a new dev doc in town: the Einstein Discovery REST API Developer Guide. Now you have a comprehensive, centralized reference for Einstein Discovery REST API endpoints, including new endpoints for retrieving model metrics. This guide consolidates the previous dev docs for Einstein Prediction Service and Insights API, making it easier than ever to interact programmatically with Einstein Discovery stories, insights, and models.

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

SEE ALSO:

[Salesforce Help: Einstein Discovery REST API Developer Guide \(can be outdated or unavailable during release preview\)](#)



## Get Predictions Using Externally Built Models in Bulk Scoring and Async Apex

Extend the reach of your externally built machine learning models with new ways to distribute predictions to your users. You get predictions in Lightning pages, Einstein Prediction Service, and Einstein Discovery in Tableau. Now you can use these models to derive predictions in bulk scoring jobs and Async Apex. And now there's library support for Python 3.7.4 and Tensorflow 2.7.0.

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

**How:** Use your favorite modeling tool to design, build, test, and tune a machine learning model. Then, package, upload, and deploy the model in Salesforce. Specify that machine learning model in your Apex code or in your bulk scoring settings in Model Manager.

### SEE ALSO:

[Salesforce Help: Score Records in Bulk \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Get Predictions in Apex \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: Asynchronous Apex \(can be outdated or unavailable during release preview\)](#)

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

## Handle Data Quality Issues During Story Creation

Einstein Discovery now alerts you of data quality issues before a story runs rather than after. Previously, you needed a completed story to reveal data quality issues that exist in your data, repair the issue, then run the story again. Einstein Discovery automatically detects data inconsistencies in training model variables so you can immediately view and address issues as they occur.

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

**How:** Select **Create Story** on a dataset, and select manual column settings. Variable data quality issues appear immediately in story settings. Select a variable displaying an alert and follow the recommendations in variable settings.

Story Settings Superstore			Search variables...
Variables (17 of 17 Included)	Correlation ↓	Alerts	Transformation Filters
<input checked="" type="checkbox"/> # Sales <b>Maximize</b>	N/A	Outliers X	
<input checked="" type="checkbox"/> # Unit_Price	28.1% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> # Profit	18.5% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> A <sub>a</sub> Product_Sub_Category	16.2% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> # Shipping_Cost	13.8% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> A <sub>a</sub> Product_Container	12.2% <div></div>		
<input checked="" type="checkbox"/> # Quantity_Ordered_New	9.2% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> A <sub>a</sub> Ship_Mode	8.8% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> # Row_ID	5.7% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> A <sub>a</sub> City	5.7% <div></div>		
<input checked="" type="checkbox"/> # Order_ID	5.6% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> A <sub>a</sub> Product_Category	4.8% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> 📅 Order_Date	2.3% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> 📅 Ship_Date	2.2% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> # Product_Base_Margin	1.0% <div></div>	Suggested Buckets X	
<input checked="" type="checkbox"/> A <sub>a</sub> Region	0.2% <div></div>	Multicollinearity X	
<input checked="" type="checkbox"/> # Postal_Code	0.1% <div></div>	Multicollinearity X	

## Minimize Disparate Impact in Live Data (Pilot)


When production data deviates from the training model, bias can occur. Einstein Discovery now alerts you when disproportion exists within a sensitive variable, which helps you mitigate its distorting effects on your analysis and predictions in live data.

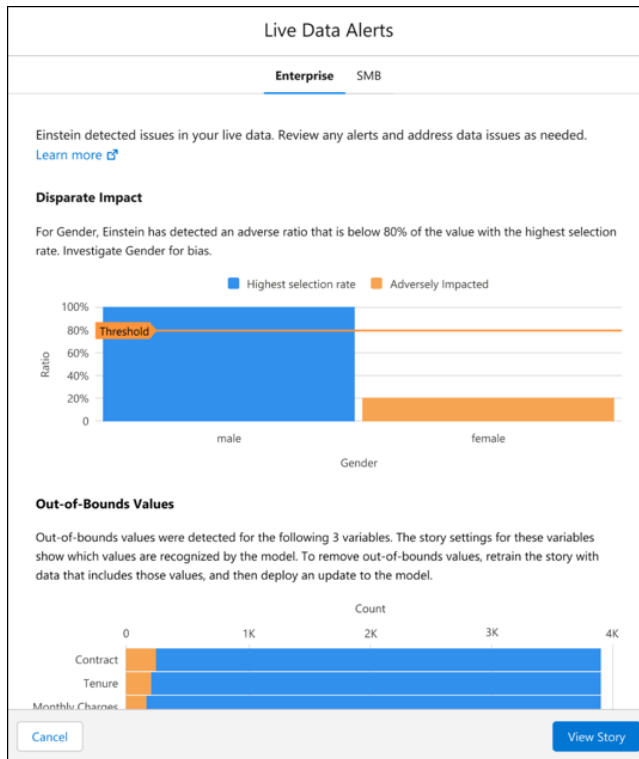
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**How:** Disparate impact gets flagged in live data as it occurs. Click the **Review Alerts**  button in your story to review detected bias.

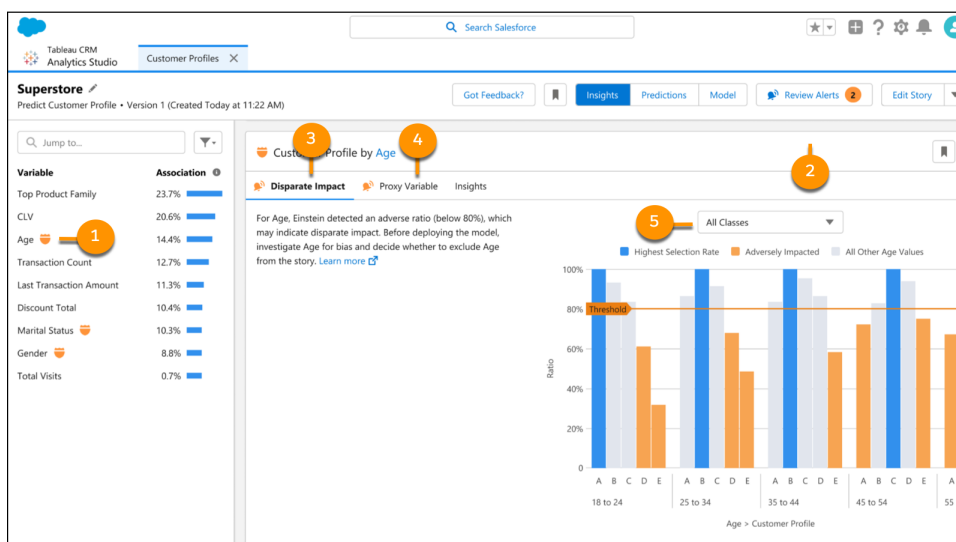


## Uncover Bias in Multiclass Models

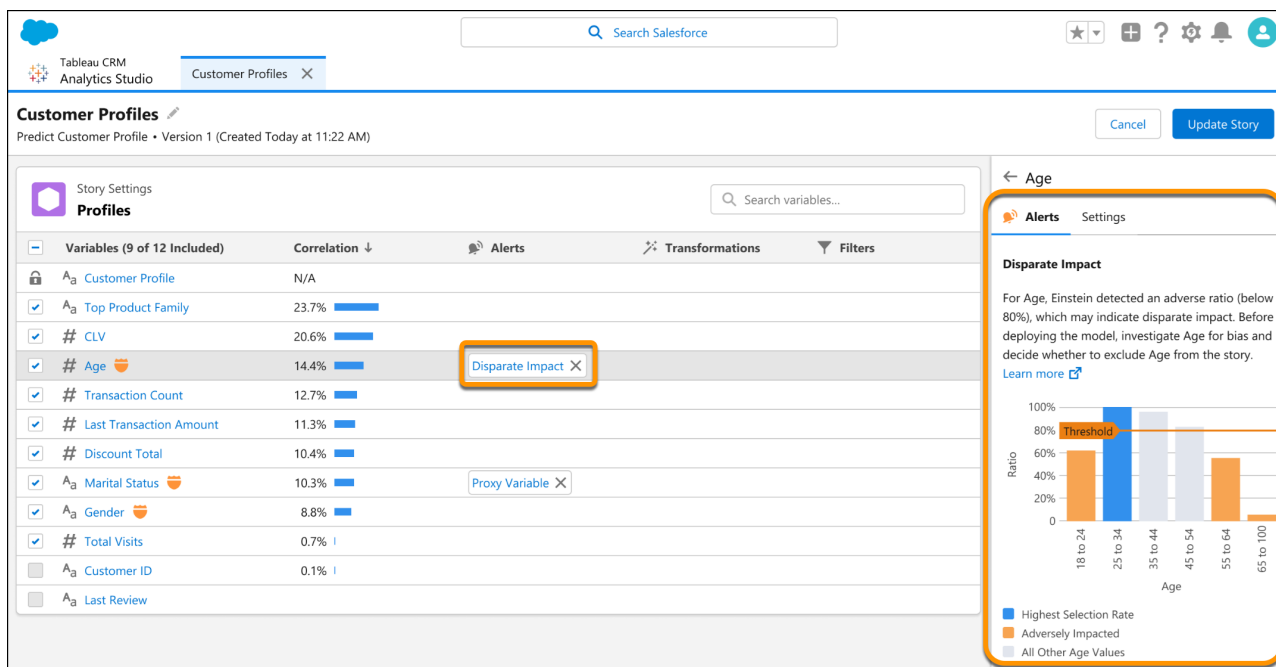
Einstein Discovery now includes bias detection for multiclass models, which helps you root out bias by variable rather than retraining an entire model. In addition to knowing that your multiclass models can flag bias, you can now use multiclass more often and expand your use case options.

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

**How:** Open a story and select the variable with detected bias (1) or click the **Review Alerts** button (2).



Select the **Disparate Impact** tab (3) and view insights. Select the **Proxy Variable** tab (4) to view variables that are highly correlated to a sensitive variable. Use the classes (5) dropdown menu to filter the chart.



Bias detection is also captured in multiclass story settings.

## Date Variable Transformations Updates

Einstein Discovery no longer supports Trend Options and simultaneous analysis of Day of Week and Month of Year transformations on a single date variable. Stories with both time transformations applied to one date variable automatically default to the Month of Year transformation. An option for concurrent analysis on a date field can be achieved by duplicating the date field, which can be achieved with Data Recipes, then applying Day of Week to the date field and Month of Year to its duplicate. Trending data over time is still supported in CRM Analytics Dashboards.

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## Get Report Insights in More Languages

Report insights are now available in the supported languages enabled on your org.

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## Handle Missing Numerical Values in Your Datasets

Too many missing values from unknown or problem data can lower the quality of your model. With Einstein Discovery, you can now allow you to impute missing numerical values in your dataset. Enable statistical imputation on a numeric variable, and then Einstein Discovery automatically replaces missing values with values derived from another subset of your data.

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

**Why:** Without imputation, Einstein Discovery handles observations with empty or null values gracefully. If the missing value is an outcome variable, Einstein Discovery omits that observation during analysis, doesn't factor it into averages, and excludes it from insights. If the missing value is an explanatory variable used in a model, Einstein Discovery generates a warning rather than a prediction.

With imputation enabled, observations with missing values are safely counted during analysis. For example, suppose the profit column in a retail store dataset is missing many values. With imputation, you can replace those missing values with values derived from other data, such as the average profit per store by square foot or by city. The result? You get more observations with predictions.

**How:** Select the variable with the **Missing Values** (1) alert in story settings. Click the **Replace Missing Values** (2) action on the Alert tab.

The screenshot shows the 'Lead Conversion' story settings in Tableau CRM Analytics Studio. The 'Alerts' tab is active, displaying a list of variables with their correlation and alerts. The 'Activity Score' variable has a 'Missing Values' alert, which is highlighted with a red circle labeled '1'. On the right, the 'Missing Values' alert details show that 25.6% of Activity Score values are missing. The 'Actions' section on the right has the 'Replace missing values' option selected, indicated by a red circle labeled '2'.

Select the operation (average, median, or mode) (3) to impute missing numbers. Next, select the variable (4) as the basis of the calculation.

The screenshot shows the 'Lead Conversion' story settings in Tableau CRM Analytics Studio, with the 'Transform' tab selected. The 'Replace Missing Values' action is highlighted with a red circle labeled '3'. The 'For Variable' dropdown is set to 'Lead Quality', highlighted with a red circle labeled '4'.

## Analytics for Everyone

Bring data to every conversation with the CRM Analytics app for Slack. Enter questions in the CRM Analytics Home search bar, and Ask Data for Salesforce provides visualizations, metrics, smart recommendations, and next-best insight suggestions. Access your CRM Analytics assets and Lightning reports and dashboards together in the unified Analytics Home (beta).

## IN THIS SECTION:

[Get Data Answers While You Search with Ask Data for Salesforce \(Generally Available\)](#)

When data changes at a fast pace, preconfigured views and dashboards can quickly become outdated. The Search Insights results from Ask Data for Salesforce help you answer questions directly from your data, without dashboards. Search Insights augment CRM Analytics search with natural language querying and autocomplete suggestions to help you quickly discover insights right on the search page. And you can select fields, values, and data to map to your question, helping the service to continually improve its interpretation of your business language.

[Unify All Your Analytics Assets in Analytics Home \(Beta\)](#)

Analytics Home now lists Lightning Reports and Dashboards and CRM Analytics assets in a personalized and intelligent home experience for every Analytics user. Analytics users get the benefit of an environment where all their content is organized in a cohesive and seamless experience. Users that are unfamiliar with Analytics Home page get a more advanced search experience, better organization, sharing, and recommendations for new content to explore. With fewer tools to manage, you can streamline content creation, management, and onboarding efforts.

[Bring Data to Every Conversation with CRM Analytics for Slack \(Generally Available\)](#)

CRM Analytics for Slack makes it easy to access your analytics right where collaboration happens in Slack. Seamlessly find, share, and collaborate on Lightning reports and dashboards and CRM Analytics insights within Slack. Stay updated on your key data, collaborate with subscriptions and notifications, and take action at the point of insight.

## Get Data Answers While You Search with Ask Data for Salesforce (Generally Available)

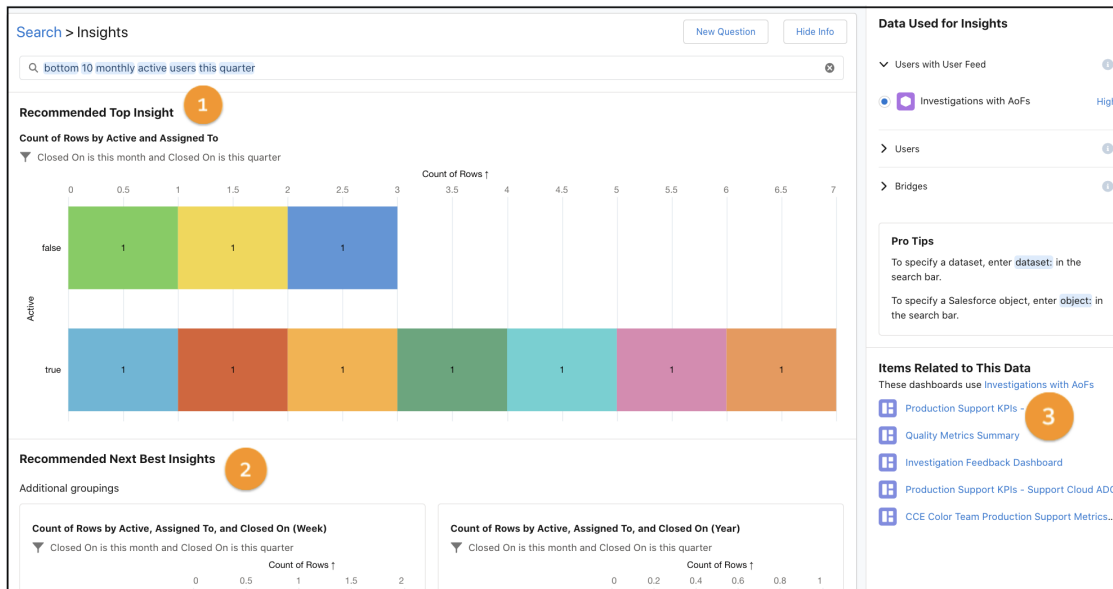
When data changes at a fast pace, preconfigured views and dashboards can quickly become outdated. The Search Insights results from Ask Data for Salesforce help you answer questions directly from your data, without dashboards. Search Insights augment CRM Analytics search with natural language querying and autocomplete suggestions to help you quickly discover insights right on the search page. And you can select fields, values, and data to map to your question, helping the service to continually improve its interpretation of your business language.

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

**Who:** Ask Data for Salesforce is available for users with a CRM Analytics Plus license.

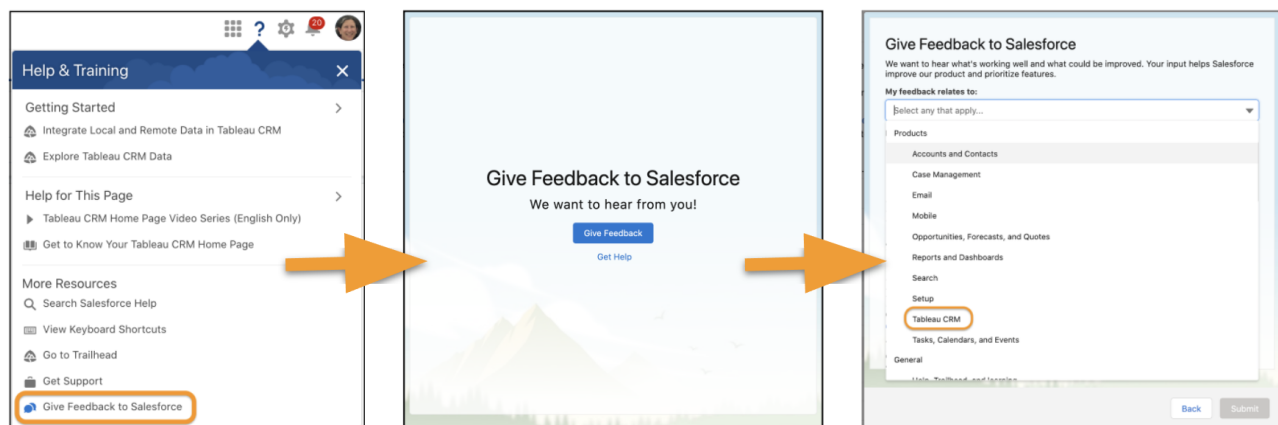
**How:** Ask Data for Salesforce is enabled by default in production orgs with 1,000 or more reports, plus active use of the Analytics Home page. Ask Data for Salesforce is also available for Full sandboxes upon request. If you have fewer than 1,000 reports but you want to try Ask Data for Salesforce, contact Salesforce Support.

Ask Data for Salesforce becomes available 24 hours after it's enabled. To get started, enter questions in the CRM Analytics Home search bar, and click **More Insights**.



The Search Insights recommended top insight is an instantly configured visualization or metric (1). The Insights page includes recommended next best insights (2), asset recommendations related to the search (3), and opportunities to revise your questions on the spot.

To give feedback about Ask Data for Salesforce, open the Salesforce Help menu by clicking **?**, and select **Give Feedback to Salesforce**. Click **Give Feedback**, and select **Tableau CRM**. Then enter your feedback and attach an image, if applicable.



**Note:** Character-based and right-to-left languages aren't supported in Ask Data for Salesforce.


SEE ALSO:

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

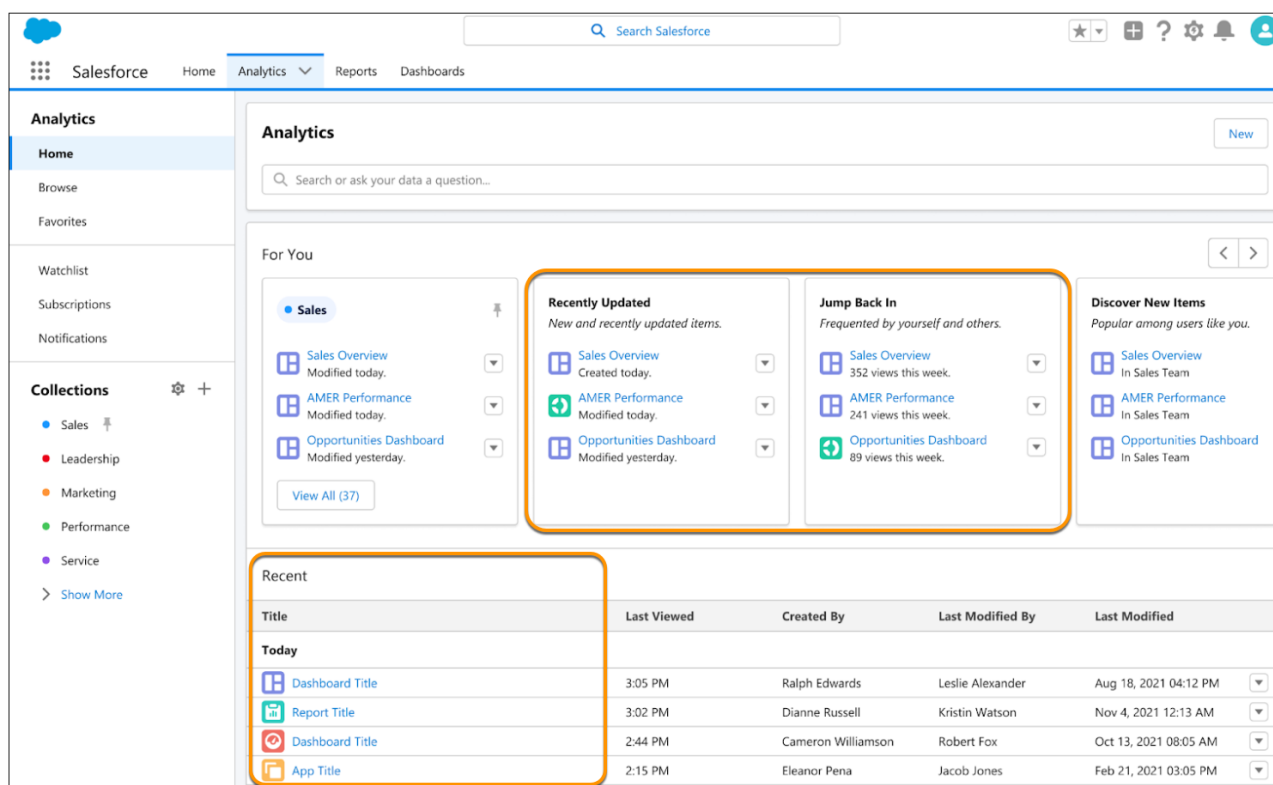
## Unify All Your Analytics Assets in Analytics Home (Beta)

Analytics Home now lists Lightning Reports and Dashboards and CRM Analytics assets in a personalized and intelligent home experience for every Analytics user. Analytics users get the benefit of an environment where all their content is organized in a cohesive and seamless experience. Users that are unfamiliar with Analytics Home page get a more advanced search experience, better organization, sharing, and recommendations for new content to explore. With fewer tools to manage, you can streamline content creation, management, and onboarding efforts

**Where:** This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics 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*, and then select **Settings**. Select **Enable the Unified Experience for Analytics Home**. From the App Launcher, select **Analytics**.



Title	Last Viewed	Created By	Last Modified By	Last Modified
<b>Today</b>				
Dashboard Title	3:05 PM	Ralph Edwards	Leslie Alexander	Aug 18, 2021 04:12 PM
Report Title	3:02 PM	Dianne Russell	Kristin Watson	Nov 4, 2021 12:13 AM
Dashboard Title	2:44 PM	Cameron Williamson	Robert Fox	Oct 13, 2021 08:05 AM
App Title	2:15 PM	Eleanor Pena	Jacob Jones	Feb 21, 2021 03:05 PM

Lightning Reports and Dashboards and CRM Analytics live in one place and are no longer scattered across different tools.

## Bring Data to Every Conversation with CRM Analytics for Slack (Generally Available)

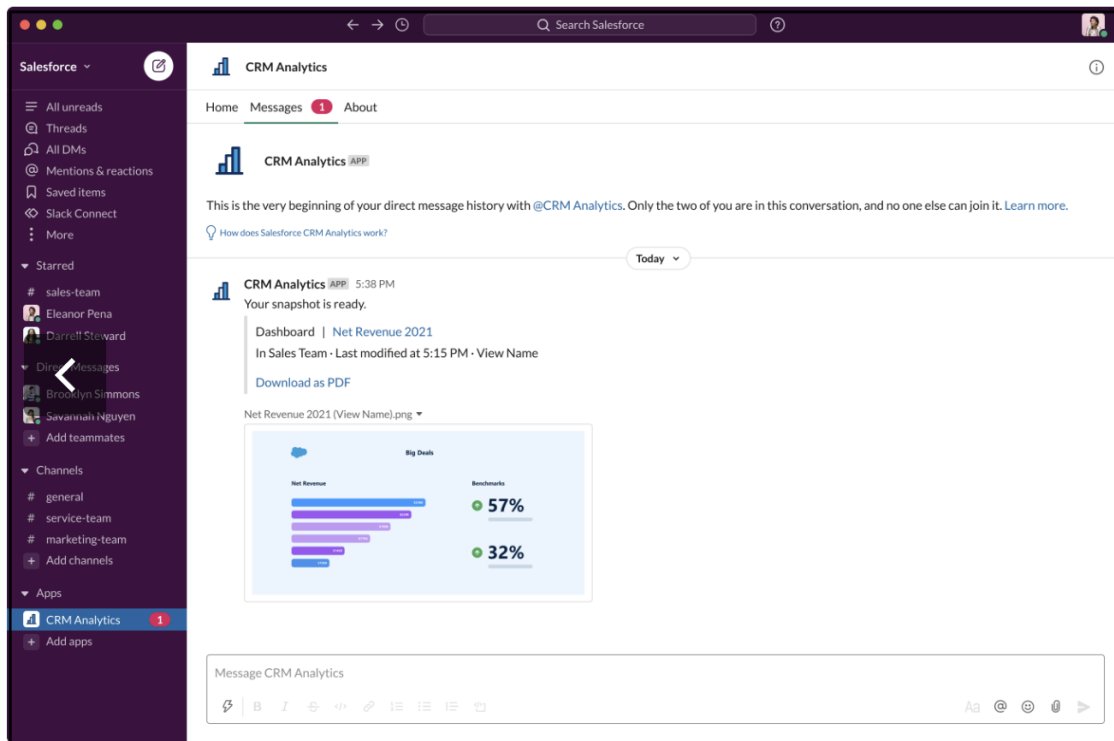
CRM Analytics for Slack makes it easy to access your analytics right where collaboration happens in Slack. Seamlessly find, share, and collaborate on Lightning reports and dashboards and CRM Analytics insights within Slack. Stay updated on your key data, collaborate with subscriptions and notifications, and take action at the point of insight.

**Where:** The CRM Analytics app for Slack works with CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. Available for use where approved by a workspace admin and installed in Slack.



**Who:** Users must have the following permissions: Connect Salesforce with Slack, Subscribe to CRM Analytics Assets, and Add Recipients to CRM Analytics Notifications.

**How:** To get started, see the [CRM Analytics for Slack Release Notes](#).



SEE ALSO:

[Salesforce Help: CRM Analytics for Slack \(can be outdated or unavailable during release preview\)](#)

## Analytics Mobile Apps

Easily read table data with text wrapping within tables, and repeater widgets are now on mobile. Get these and other enhancements when you upgrade to version 15.1 of CRM Analytics for iOS and Android.

IN THIS SECTION:

[Get the Latest Version of CRM Analytics for iOS and Android](#)

To benefit from the latest enhancements and bug fixes, upgrade to version 15.1 of CRM Analytics for iOS and Android.

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

To benefit from the latest enhancements and bug fixes, upgrade to version 15.1 of CRM Analytics for iOS and Android.

**Where:** These changes apply to CRM Analytics for iOS and CRM Analytics for Android. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** For the latest enhancements, download CRM Analytics from the App Store or Google Play.

Check out what's new in CRM Analytics 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.

Check out what's new in CRM Analytics for Android.

- New in version 15.1.
  - Bug fixes and usability enhancements.

## Commerce

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Commerce Cloud enhancements include new and updated features for Salesforce B2B and B2C Commerce, Commerce Einstein, Omnichannel Inventory, and Salesforce Order Management.

### IN THIS SECTION:

#### [Salesforce B2B and B2B2C Commerce](#)

Sell globally in B2C stores and use enhanced promotion features. Integrate a custom payment component, deploy a B2B checkout flow more easily, and use a new checkout component to customize the checkout experience in a B2C store. Sort search output by price and customize search output. Use new workspace features to manage commerce data. Add improved multilevel navigation to stores. Let users seamlessly integrate third-party applications. Get information faster from an updated and reorganized developer guide.

#### [Commerce Einstein](#)

Personalize consumer experiences using Commerce Einstein AI-powered merchandising tools in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

#### [Omnichannel Inventory](#)

Manage inventory availability at the product level.

#### [Salesforce Order Management](#)

Manage key aspects of your order workflow with new report templates and keep your customers happy with enhanced routing options and expanded discount functionality.

## Salesforce B2B and B2B2C Commerce

Sell globally in B2C stores and use enhanced promotion features. Integrate a custom payment component, deploy a B2B checkout flow more easily, and use a new checkout component to customize the checkout experience in a B2C store. Sort search output by price and customize search output. Use new workspace features to manage commerce data. Add improved multilevel navigation to stores. Let users seamlessly integrate third-party applications. Get information faster from an updated and reorganized developer guide.

### IN THIS SECTION:

#### [Sell Globally in B2C Stores](#)

Specify currency and language for a B2C store. Select the country where purchases can be shipped for the store and indicate whether store prices include taxes or not. Use new configurable properties in store components to translate store labels. Configure store components to inform users whether prices displayed include tax.

### [Sort Search Output by Price](#)

Use sort rules so that your customers can arrange their search results. For sort rules that arrange results by price, select a price book for the site.

### [Sort Defaults to First Menu Option](#)

Sort uses the first rule in the sort menu as the default. Previously, sort used the Best Match rule by default until a customer selected a different rule from the sort menu.

### [Use More Properties to Customize Search Input and Search Bar Components](#)

You can use more properties to customize the B2B Commerce for Lightning Experience Search Input component and B2B2C Commerce Search Bar component. Enhancements include design selections for border radius, and various color settings.

### [Use Enhanced Workspaces to Manage Commerce Data](#)

Now you can make inline edits on name and description in all workspaces. In the Product Workspace, you can select and show categories as a column. Use the new Customer Workspace to easily manage buyers and shoppers.

### [Import More Products Using a CSV File](#)

You can now upload up to 5,000 products without images and up to 1,000 products with images using a CSV file. Upload records either for a particular store or globally so that any store can access them.

### [Promotions](#)

Now you can create commerce promotions for both B2B and B2C stores. Show customers more promotion details in their carts and B2B order history. You can also generate custom reports on promotions and coupons.

### [Give Users Permission to Integrate Third-Party Applications in B2B and B2C Commerce Stores](#)

Now your users can seamlessly integrate third-party applications with the B2B Commerce Integrator, Commerce Entitlements Integrator, and Commerce Shipment Integrator permissions.

### [Get Developer Guidance Easier and Faster](#)

The B2B2C Commerce and B2B Commerce for Lightning Experience Developer Guides are now combined into one streamlined set of topics that's easier to navigate and search. Most topics in the new combined documentation apply to both products unless indicated in the topic title.

### [Integrate a Custom Payment Component](#)

Repurpose your native payment experience and improve response times by integrating a custom component in a Salesforce Commerce B2C store. The new component provides consistency across stores because they use the same credit card payment methods and order processing. And the API keys that buyers trigger when purchasing items reduce the number of server-side API calls for payment authorization.

### [Deploy and Customize B2B Checkout Flows More Easily](#)

Use simple GitHub scripts to stand up a scratch org with a fully functioning checkout, ready to test with preconfigured buyers. Customize the checkout sequence in Experience Builder. For example, click through to select a purchase order or credit card flow or select a checkout that supports promotions. Optionally customize your checkout in Flow Builder.

### [Create a Custom Checkout Experience for Your B2C Store](#)

The new top-level Checkout Lightning web component provides two layout options: a one-page layout and an accordion layout with collapsible sections. Both layouts include modular subcomponents that you can configure. You can also enhance the layouts with your own custom checkout functionality.

### [Add Accessible Navigation to Your Store](#)

Help customers find their way around your store with improved Multilevel Navigation Menu components for B2B and B2C stores. Customers can move forward and backward through five levels of accessible submenus. These components replace the deprecated Multi-Level Navigation Menu components.

### [Search by SKU in B2B Stores](#)

Your B2B Commerce customers can find the products they want faster with searches by stock keeping unit (SKU). When a customer searches sku: or SKU: followed by one SKU code or multiple separated by spaces, Commerce Search queries the Product SKU field and returns matching results from your store.

## Sell Globally in B2C Stores

Specify currency and language for a B2C store. Select the country where purchases can be shipped for the store and indicate whether store prices include taxes or not. Use new configurable properties in store components to translate store labels. Configure store components to inform users whether prices displayed include tax.

### IN THIS SECTION:

#### [Configure Country and Tax for B2C Stores](#)

Specify the country that a store ships to and indicate whether prices include tax. To include tax, select gross, and to omit tax, select net.

#### [Static Labels Are Translated](#)

Labels that remained in English when you switched languages are now translated. In Experience Builder, labels such as Password on the My Account Password component now change to the language that you switch to. The static labels for these components are translated: My Account Header, My Account Password, and My Profile.

#### [Show B2C Shoppers That Prices Include Tax](#)

Remind shoppers how your store handles taxes so that they know what to expect when they check out. If your store uses a gross tax type, you can configure the Product Information and Cart Totals components to display a note that the product price includes the tax.

## Configure Country and Tax for B2C Stores

Specify the country that a store ships to and indicate whether prices include tax. To include tax, select gross, and to omit tax, select net.

**Where:** This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To specify the country and tax settings for a B2C store, click the Administration tile on the store's home page. Be careful selecting the tax type. After you activate a store, you can't change the tax type setting.

### SEE ALSO:

[Configure Language and Currency for a Non-U.S. B2C Store \(can be outdated or unavailable during release preview\)](#)

[Configure Tax Settings for a Non-U.S. B2C Store \(can be outdated or unavailable during release preview\)](#)

## Static Labels Are Translated

Labels that remained in English when you switched languages are now translated. In Experience Builder, labels such as Password on the My Account Password component now change to the language that you switch to. The static labels for these components are translated: My Account Header, My Account Password, and My Profile.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[My Account Header Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

[My Account Password Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

[My Profile Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

## Show B2C Shoppers That Prices Include Tax

Remind shoppers how your store handles taxes so that they know what to expect when they check out. If your store uses a gross tax type, you can configure the Product Information and Cart Totals components to display a note that the product price includes the tax.

**Where:** This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Cart Totals Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

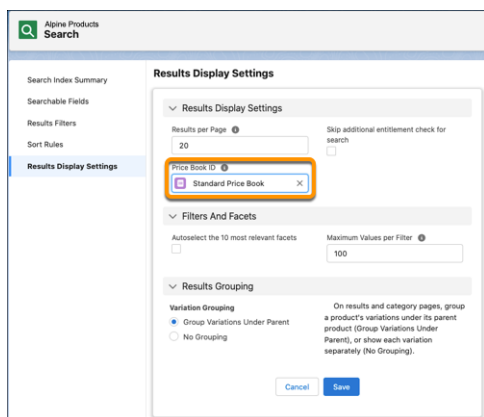
[Product Information Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

## Sort Search Output by Price

Use sort rules so that your customers can arrange their search results. For sort rules that arrange results by price, select a price book for the site.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** On the Results Display Settings tab, click the **Price Book ID** pencil icon, and enter the name of an uploaded price book. Then rebuild the index on the Search Index Summary tab.



SEE ALSO:

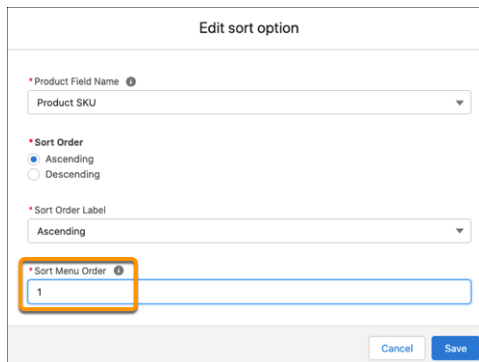
[Select a Price Book for Sort \(can be outdated or unavailable during release preview\)](#)

## Sort Defaults to First Menu Option

Sort uses the first rule in the sort menu as the default. Previously, sort used the Best Match rule by default until a customer selected a different rule from the sort menu.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To change the sort menu default, click the **Search** tile **Sort Rules** tab, and edit or add a new sort rule. Change the **Sort Menu Order** field value to 1, and save your changes. Rebuild the index from the Search Index Summary tab.



SEE ALSO:

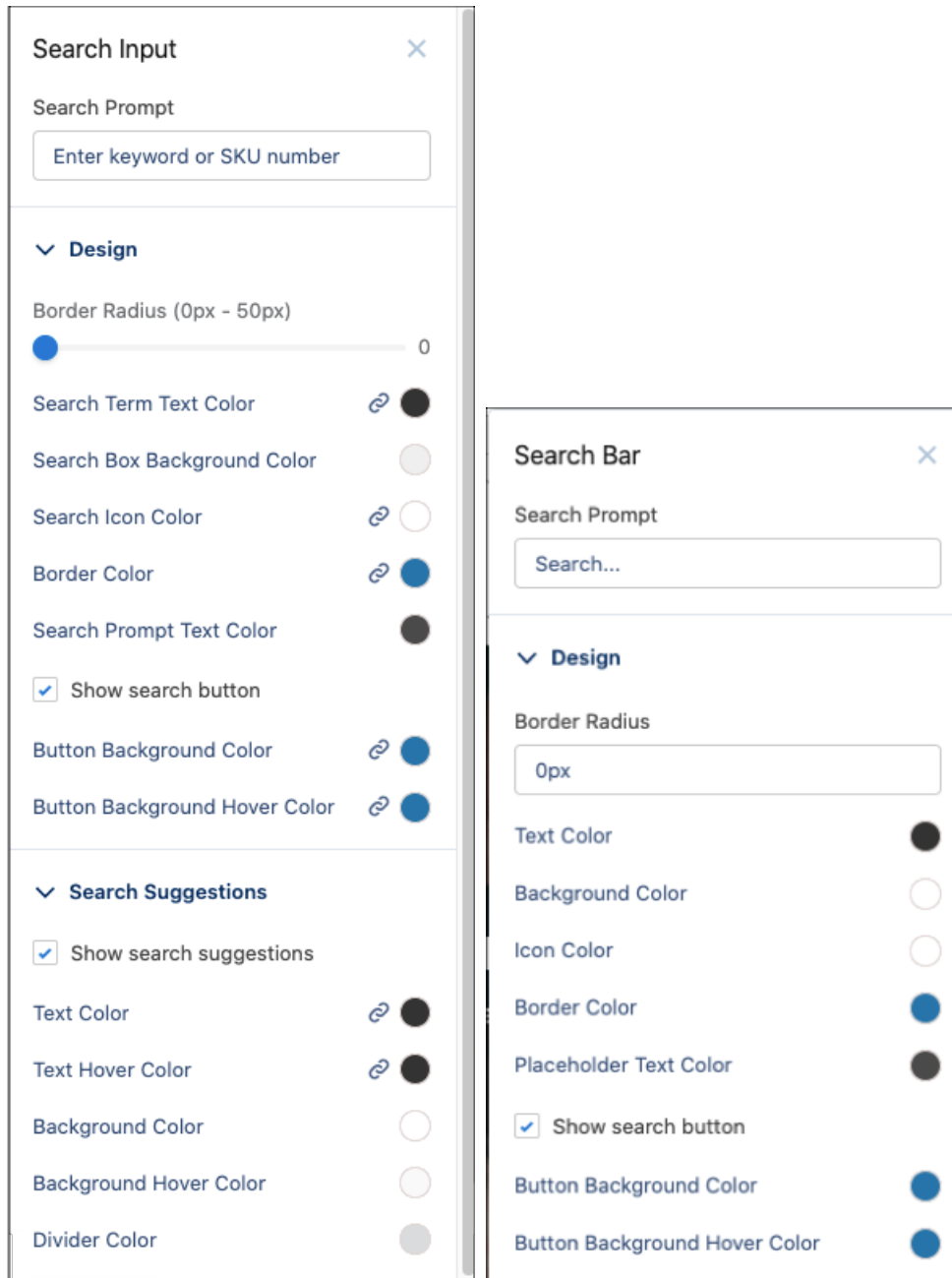
[Add a Sort Rule \(can be outdated or unavailable during release preview\)](#)

## Use More Properties to Customize Search Input and Search Bar Components

You can use more properties to customize the B2B Commerce for Lightning Experience Search Input component and B2B2C Commerce Search Bar component. Enhancements include design selections for border radius, and various color settings.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** Using Experience Builder, click the component, make modifications, and publish your changes.



SEE ALSO:

[Search Input Component for B2B Stores \(can be outdated or unavailable during release preview\)](#)

[Search Bar Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

## Use Enhanced Workspaces to Manage Commerce Data

Now you can make inline edits on name and description in all workspaces. In the Product Workspace, you can select and show categories as a column. Use the new Customer Workspace to easily manage buyers and shoppers.

**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 a workspace.

SEE ALSO:

[Commerce Workspaces \(can be outdated or unavailable during release preview\)](#)

## Import More Products Using a CSV File

You can now upload up to 5,000 products without images and up to 1,000 products with images using a CSV file. Upload records either for a particular store or globally so that any store can access them.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To upload product records from a CSV file, click **Import** from the product workspace.

SEE ALSO:

[Import \(can be outdated or unavailable during release preview\)](#)

## Promotions

Now you can create commerce promotions for both B2B and B2C stores. Show customers more promotion details in their carts and B2B order history. You can also generate custom reports on promotions and coupons.

IN THIS SECTION:

[Drive B2C Sales with Promotions](#)

Create promotions to boost new and repeat business in your B2C store. Offer deals on specific products, product categories, and orders. Discount purchases automatically, and share coupons that shoppers can redeem in their carts. Then use Experience Builder to customize how they appear.

[Create Custom Reports for Promotions](#)

Get a detailed list of all your active commerce promotions and their associated products. You can also create a similar report for coupons.

[Show More Details About Product Promotions](#)

The Promotions component now itemizes all product promotions applied to a cart, so customers can see the amount of each discount. Previously, this component grouped all product-level promotions together.

[Show Customers Promotion Savings](#)

Increase promotion visibility by detailing the amount customers have saved on their order. Promotions fields are now available on the Order Summary Amounts and Order Summary Products components.

## Drive B2C Sales with Promotions

Create promotions to boost new and repeat business in your B2C store. Offer deals on specific products, product categories, and orders. Discount purchases automatically, and share coupons that shoppers can redeem in their carts. Then use Experience Builder to customize how they appear.



**Where:** This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Commerce Promotions \(can be outdated or unavailable during release preview\)](#)

## Create Custom Reports for Promotions

Get a detailed list of all your active commerce promotions and their associated products. You can also create a similar report for coupons.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** From Setup, navigate to Report Types. Choose **Promotions** and what you want to include in the report.

SEE ALSO:

[Commerce Promotions \(can be outdated or unavailable during release preview\)](#)

[Create a Custom Report Type \(can be outdated or unavailable during release preview\)](#)

## Show More Details About Product Promotions

The Promotions component now itemizes all product promotions applied to a cart, so customers can see the amount of each discount. Previously, this component grouped all product-level promotions together.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Commerce Promotions \(can be outdated or unavailable during release preview\)](#)

[Promotions Component for B2B Stores \(can be outdated or unavailable during release preview\)](#)

## Show Customers Promotion Savings

Increase promotion visibility by detailing the amount customers have saved on their order. Promotions fields are now available on the Order Summary Amounts and Order Summary Products components.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** These new fields are available to the Order Summary Amounts component under Net Tax Orders and Gross Tax Orders.

- Line Item Promotions
- Order Level Promotions
- Total Promotions (appears by default)
- Individual Shipping Promotions
- Order Level Shipping Promotions
- Total Shipping Promotions

These new fields are available to the Order Summary Products component under Product.

- Line Item Promotions Applied

- [Order Level Promotions Applied](#)

SEE ALSO:

[Order Summary Amounts Component for B2B Stores \(can be outdated or unavailable during release preview\)](#)

[Order Summary Products Component for B2B Stores \(can be outdated or unavailable during release preview\)](#)

## Give Users Permission to Integrate Third-Party Applications in B2B and B2C Commerce Stores

Now your users can seamlessly integrate third-party applications with the B2B Commerce Integrator, Commerce Entitlements Integrator, and Commerce Shipment Integrator permissions.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** To give users the Commerce Shipment Integrator permission, assign them the Merchandiser or Commerce Admin permission set. For the B2B Commerce Integrator and Commerce Entitlements Integrator permissions, clone the Commerce Admin permission set, enable the integrator permission in the cloned version, and assign the cloned permission set to the user.

SEE ALSO:

[Commerce Integrator Permissions \(can be outdated or unavailable during release preview\)](#)

## Get Developer Guidance Easier and Faster

The B2B2C Commerce and B2B Commerce for Lightning Experience Developer Guides are now combined into one streamlined set of topics that's easier to navigate and search. Most topics in the new combined documentation apply to both products unless indicated in the topic title.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

## Integrate a Custom Payment Component

Repurpose your native payment experience and improve response times by integrating a custom component in a Salesforce Commerce B2C store. The new component provides consistency across stores because they use the same credit card payment methods and order processing. And the API keys that buyers trigger when purchasing items reduce the number of server-side API calls for payment authorization.

**Where:** This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Deploy and Customize B2B Checkout Flows More Easily

Use simple GitHub scripts to stand up a scratch org with a fully functioning checkout, ready to test with preconfigured buyers. Customize the checkout sequence in Experience Builder. For example, click through to select a purchase order or credit card flow or select a checkout that supports promotions. Optionally customize your checkout in Flow Builder.

**Where:** This change applies to B2B Commerce on Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Create a Custom Checkout Experience for Your B2C Store

The new top-level Checkout Lightning web component provides two layout options: a one-page layout and an accordion layout with collapsible sections. Both layouts include modular subcomponents that you can configure. You can also enhance the layouts with your own custom checkout functionality.

**Where:** This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** In Experience Builder, click or add the component to configure it. For B2B2C Commerce, select it in the Checkout page.

SEE ALSO:

[Checkout Component for B2C Stores \(can be outdated or unavailable during release preview\)](#)

[Commerce Checkout \(can be outdated or unavailable during release preview\)](#)

## Add Accessible Navigation to Your Store

Help customers find their way around your store with improved Multilevel Navigation Menu components for B2B and B2C stores. Customers can move forward and backward through five levels of accessible submenus. These components replace the deprecated Multi-Level Navigation Menu components.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

**How:** Using Experience Builder, click or add the component to configure it. For B2B Commerce, select it in the Store Header. If you currently use the deprecated Multi-Level Navigation Menu component, it continues to work until you remove it or switch to the new component.

SEE ALSO:

[B2B Commerce on Lightning Experience Components \(can be outdated or unavailable during release preview\)](#)

[B2C Commerce Components \(can be outdated or unavailable during release preview\)](#)

## Search by SKU in B2B Stores

Your B2B Commerce customers can find the products they want faster with searches by stock keeping unit (SKU). When a customer searches sku: or SKU: followed by one SKU code or multiple separated by spaces, Commerce Search queries the Product SKU field and returns matching results from your store.

**Where:** This change applies to B2B Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Commerce Search and Auto-Correction Management \(can be outdated or unavailable during release preview\)](#)

## Commerce Einstein

Personalize consumer experiences using Commerce Einstein AI-powered merchandising tools in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

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## IN THIS SECTION:

[Create B2B and B2C Custom Components with Commerce Einstein Recommendations and Activities APIs](#)

Combine the power of Commerce Einstein Recommendations with the flexibility of a customized front-end user experience. For custom B2B and B2C Commerce Einstein Recommendations components, retrieve in-store activity data, such as product views, with the Activity Tracking API. If you're using B2B2C Commerce, then employ the Product Recommendation API as a wire adapter to deliver recommendations within a custom Lightning web component. For B2B Commerce, use Commerce Einstein Recommendations Connect APIs to select and deliver recommendations, while ensuring appropriate product entitlement filtering.

## SEE ALSO:

[Einstein Release Notes](#)

## Create B2B and B2C Custom Components with Commerce Einstein Recommendations and Activities APIs

Combine the power of Commerce Einstein Recommendations with the flexibility of a customized front-end user experience. For custom B2B and B2C Commerce Einstein Recommendations components, retrieve in-store activity data, such as product views, with the Activity Tracking API. If you're using B2B2C Commerce, then employ the Product Recommendation API as a wire adapter to deliver recommendations within a custom Lightning web component. For B2B Commerce, use Commerce Einstein Recommendations Connect APIs to select and deliver recommendations, while ensuring appropriate product entitlement filtering.

**Where:** This change applies to B2B Commerce on Lightning Experience and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

## SEE ALSO:

[Commerce Einstein Webstore Recommendations \(can be outdated or unavailable during release preview\)](#)

## Omnichannel Inventory

Manage inventory availability at the product level.

## IN THIS SECTION:

[Manage Inventory Availability at the Product Level](#)

Exclude a product SKU from a location group to manage inventory at the product level. The excluded product isn't included in the available-to-order or available-to-fulfill counts for the location group, but it remains exposed in other groups where it's not excluded. SKUs will also remain exposed at the individual location-level used for in-store use cases. Use Omnichannel Inventory Impex files to append, replace, and delete product SKU exclusions.

### Manage Inventory Availability at the Product Level

Exclude a product SKU from a location group to manage inventory at the product level. The excluded product isn't included in the available-to-order or available-to-fulfill counts for the location group, but it remains exposed in other groups where it's not excluded. SKUs will also remain exposed at the individual location-level used for in-store use cases. Use Omnichannel Inventory Impex files to append, replace, and delete product SKU exclusions.

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

SEE ALSO:

[Inventory Impex \(can be outdated or unavailable during release preview\)](#)

## Salesforce Order Management

Manage key aspects of your order workflow with new report templates and keep your customers happy with enhanced routing options and expanded discount functionality.

IN THIS SECTION:

[Gain Insights into Order Data with Report Templates](#)

Use the new templates to create reports that deliver insights into orders and sales, fulfillment states, refunds, cancellations, and discounts. The Order Management report templates are distributed in an unlocked package. Install the report templates from the package.

[Apply Discounts to Orders at Any Stage in the Fulfillment Process](#)

You can now apply discounts to orders in the ordered, partially ordered, allocated, and fulfilled states.

[Manage the Priority and Capacity of Your Fulfillment Locations](#)

Enhance your order routing by ranking locations by priority. You can now also limit the number of fulfillment orders assigned to a location by specifying its capacity.

[The B2C Commerce Integration Automatically Creates Web Stores as Needed](#)

If you don't set up web stores for your B2C Commerce storefront, then the integration creates them as needed based on ingested order data.

## Gain Insights into Order Data with Report Templates

Use the new templates to create reports that deliver insights into orders and sales, fulfillment states, refunds, cancellations, and discounts. The Order Management report templates are distributed in an unlocked package. Install the report templates from the package.

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

**How:** Open the [Install Order Management Basic Reports](#) page and follow the instructions in Help.

SEE ALSO:

[Install the Order Management Basic Reports Package \(can be outdated or unavailable during release preview\)](#)

[Order Management Report Templates \(can be outdated or unavailable during release preview\)](#)

## Apply Discounts to Orders at Any Stage in the Fulfillment Process

You can now apply discounts to orders in the ordered, partially ordered, allocated, and fulfilled states.

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

SEE ALSO:

[Discount Order Items \(can be outdated or unavailable during release preview\)](#)

## Manage the Priority and Capacity of Your Fulfillment Locations

Enhance your order routing by ranking locations by priority. You can now also limit the number of fulfillment orders assigned to a location by specifying its capacity.

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

## The B2C Commerce Integration Automatically Creates Web Stores as Needed

If you don't set up web stores for your B2C Commerce storefront, then the integration creates them as needed based on ingested order data.

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

**Why:** You don't have to manually set up web stores for your storefront anymore. However, when the integration creates a web store, it doesn't assign an existing location. When a web store is created without an assigned location, the platform creates a location record to assign to it. If your org includes any custom validations on the Location object, they must account for these automatically created locations.

SEE ALSO:

[Salesforce Order Management Implementation Guide](#)

## Customization

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Make your org more secure thanks to updated restriction rules and permissions. Improve system performance and health with enhancements to the way picklist management and values are handled. Get better address data accuracy and improve user experience with Custom Address Fields (beta).

IN THIS SECTION:

### [Sharing](#)

Grant secure access to external objects with restriction rules. Restriction rules no longer apply to creating records. Scoping and restriction rules support single picklists in record criteria and user criteria. Plus, a more granular permission governs access to users' personally identifiable information (PII) when admins secure it using the Enhanced Personal Information Management setting.

### [Fields](#)

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Get email notifications when custom picklist fields have more than 4,000 inactive values and then use this information to bulk delete the inactive unused values. Save more time managing your picklists with the ability to delete, activate, deactivate, or replace multiple custom picklist field values at once.

### [Globalization](#)

Enable the new locale format standard via a release update. Hmong and Punjabi are available as platform-only languages. The UI for Salesforce Maps and Loyalty Management is available in more languages. And translations changed for some standard object, tab, and field names.

### [Permissions](#)

Create permission set and permission set group assignments with an expiration date, and review the release update for this change. And monitor the assignment of critical user permissions by creating transaction security policies.

### [External Services](#)

Register more APIs, update more External Services registrations, and call your External Service registrations directly from Apex.

### [Salesforce Connect](#)

Salesforce Connect adapter for Amazon DynamoDB (generally available) and Salesforce Connect adapter for Amazon Athena (pilot) integrate AWS data natively with Salesforce business applications and take advantage of the features offered by the Salesforce Platform.

### [Einstein Prediction Builder](#)

Discover the new Guided Setup flow to build predictions. The new flow lets you quickly iterate your predictions and save your settings so you can build when you're ready. Data Checker also automatically checks if you have enough records to build and lets you know whether you can build successfully.

### [General Setup](#)

Say goodbye to the page layout when customizing related lists. Now you can customize them right in the Lightning App Builder with the new Dynamic Related List - Single component. Say hello to 19 new Date and Time, Math, and Text functions to make your formulas even more robust.

## Sharing

Grant secure access to external objects with restriction rules. Restriction rules no longer apply to creating records. Scoping and restriction rules support single picklists in record criteria and user criteria. Plus, a more granular permission governs access to users' personally identifiable information (PII) when admins secure it using the Enhanced Personal Information Management setting.

### IN THIS SECTION:

#### [Control Access to External Object Records with Restriction Rules](#)

Restriction rules allow certain users to access only the records that are essential to their work. To apply this layer of security to data that's stored outside your Salesforce org, set a restriction rule on external object records.

#### [Create and Edit Records That a Restriction Rule Applies To](#)

Restriction rules no longer prevent users from creating or editing a record. Users can create a record that a restriction rule subsequently blocks their access to. A user can edit a record so that a restriction rule blocks subsequent access to the record based on the value they changed.

#### [Adjust Restriction Rules Permissions](#)

To standardize the way that permissions work, users with the View All or Modify All permission can now access records that a restriction rule applies to. The View All or Modify All permissions now work just like the Modify All Data and View All Data permissions. Restriction rules no longer block access to records for users assigned View All or Modify All for an object.

#### [Preserve User Access to Personal Information Fields](#)

To ensure that the appropriate users can access personally identifiable information (PII) in Summer '22, update those users' permissions. Users with broad permissions such as View All Data and View All Users can no longer view personal information. To give users access to personal information, assign the View Concealed Field Data permission, which replaces the View User Records with PII permission.

#### [Build More Flexible Restriction and Scoping Rules with Single Picklists](#)

To restrict record access based on a custom picklist value, add a single picklist to your restriction or scoping rule. Single picklists are supported in record criteria, 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.

### Delete Obsolete Shares Asynchronously

When deleting a group, such as a public group, the shares to the group become obsolete. Salesforce removes obsolete shares at off-peak times to minimize wait times and maximize available resources for other operations. This feature is turned on by default in the Summer '22 release.

## Control Access to External Object Records with Restriction Rules

Restriction rules allow certain users to access only the records that are essential to their work. To apply this layer of security to data that's stored outside your Salesforce org, set a restriction rule on external object records.

**Where:** Restriction rules are available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. External objects are available with Salesforce Connect and Files Connect.

**How:** To create and manage restriction rules for external object records, add a restriction rule from the External Data Sources page in Setup. Only external objects created using the Salesforce Connect: OData 2.0, OData 4.0, and Cross-Org adapters support restriction rules.

External objects don't appear in Object Manager. To navigate to an external object, from Setup, in the Quick Find box, enter *External Data Sources*, and then select **External Data Sources**. Select an external object from the list view on this page. Or find external objects in the Most Recently Used list in Setup.

Admins are responsible for ensuring that rules they create on external objects don't negatively impact performance in Salesforce or in the external system.

### Important:

- Editing or deleting a restriction rule on an external object causes an additional database call, which can result in additional billing when the external data source bills per call.
- When search is enabled for external object records, searching requires additional database calls each time. Avoid additional charges by turning off search for external object records.

As with all restriction rules, using only object fields that are indexed is recommended, especially in record criteria.

### SEE ALSO:

[Developer Guide: Restriction Rules \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Restriction Rule \(can be outdated or unavailable during release preview\)](#)

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

[Object Reference: External Objects \(can be outdated or unavailable during release preview\)](#)

## Create and Edit Records That a Restriction Rule Applies To

Restriction rules no longer prevent users from creating or editing a record. Users can create a record that a restriction rule subsequently blocks their access to. A user can edit a record so that a restriction rule blocks subsequent access to the record based on the value they changed.

**Where:** Restriction rules are available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Because restriction rules no longer apply when a user creates a record, you can observe these behaviors.

- Restriction rules no longer prevent a user from creating a record. Users can create a record even if a restriction rule's criteria blocks their access to the record after they create it.
- Editing a field on a record can cause a restriction rule to block access to that record. Based on the edited value, the user can no longer view, edit, or delete the record.



**How:** Create and manage restriction rules by navigating to a supported object in the Object Manager.

## Adjust Restriction Rules Permissions

To standardize the way that permissions work, users with the View All or Modify All permission can now access records that a restriction rule applies to. The View All or Modify All permissions now work just like the Modify All Data and View All Data permissions. Restriction rules no longer block access to records for users assigned View All or Modify All for an object.

**Where:** Restriction rules are available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Find the View All or Modify All permissions in Object Permissions in Permission Sets.

## Preserve User Access to Personal Information Fields

To ensure that the appropriate users can access personally identifiable information (PII) in Summer '22, update those users' permissions. Users with broad permissions such as View All Data and View All Users can no longer view personal information. To give users access to personal information, assign the View Concealed Field Data permission, which replaces the View User Records with PII permission.

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

**How:** To maintain a user's access, including work.com users, to personal information fields, assign the user to a permission set in Setup that grants the user the View Concealed Field Data permission.

## Build More Flexible Restriction and Scoping Rules with Single Picklists

To restrict record access based on a custom picklist value, add a single picklist to your restriction or scoping rule. Single picklists are supported in record criteria, 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 in Lightning Experience to customers using Unlimited or Performance Edition with Signature Support or Program Architect or Technical Account Manager professional services.

**How:** To use a picklist in your rule's record criteria, navigate to Object Manager in Setup and select an object. Click **Restriction Rules** or **Scoping Rules**. Name and describe the rule, and then activate it. Select a picklist as the type field in record criteria, and choose a picklist value to determine the records that the rule applies to.

SEE ALSO:

[Salesforce Help: Create a Restriction Rule \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Custom Picklist Field \(can be outdated or unavailable during release preview\)](#)

## 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 personally 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, guest users can't see their own email information.

SEE ALSO:

[Salesforce Help: Manage Personal User Information Visibility for External Users \(can be outdated or unavailable during release preview\)](#)  
[Release Updates](#)

## Delete Obsolete Shares Asynchronously

When deleting a group, such as a public group, the shares to the group become obsolete. Salesforce removes obsolete shares at off-peak times to minimize wait times and maximize available resources for other operations. This feature is turned on by default in the Summer '22 release.

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

SEE ALSO:

[Salesforce Help: Asynchronous Deletion of Obsolete Shares \(can be outdated or unavailable during release preview\)](#)

## Fields

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Get email notifications when custom picklist fields have more than 4,000 inactive values and then use this information to bulk delete the inactive unused values. Save more time managing your picklists with the ability to delete, activate, deactivate, or replace multiple custom picklist field values at once.

IN THIS SECTION:

[Get a List of Custom Picklist Fields with Inactive Values](#)

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Get email notifications when custom picklist fields have more than 4,000 inactive values and then use this information to bulk delete the inactive unused values. Previously, you checked each field for inactive values, which is time consuming when there are many custom picklist fields.

[Deliver to Your Customers with Custom Address Fields \(Beta\)](#)

Improve address data accuracy and your users' experience with Custom Address Fields (beta). For example, add a Warehouse Address field to a standard or custom object. Users can populate a custom address field manually, or they can use the Google lookup to search for an address. Then you can access each address that's stored in a custom address field, either as a structured compound data type or as individual address components.

### [Clean Up Inactive Picklist Values \(Beta\)](#)

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. You can now bulk delete inactive unused picklist values. Previously, custom picklists with many inactive values were difficult to maintain because you deleted inactive values one at a time.

### [Bulk Manage Picklist Values \(Beta\)](#)

Save more time managing your picklists. You can now delete, activate, deactivate, or replace multiple custom picklist field values at once. Previously, you modified them one at a time.

### [Learn Which Picklist Values Are Duplicates](#)

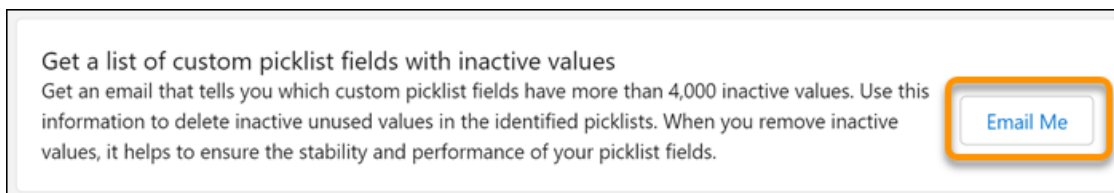
You now get a descriptive message that tells you which picklist values are duplicates when you add new picklist values. Previously, you saw a message that reported only that there were duplicate values.

## Get a List of Custom Picklist Fields with Inactive Values

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Get email notifications when custom picklist fields have more than 4,000 inactive values and then use this information to bulk delete the inactive unused values. Previously, you checked each field for inactive values, which is time consuming when there are many custom picklist fields.

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

**How:** From Setup, in the Quick Find box, enter *Settings*, and then select **Picklist Settings**. From the Picklist Settings page, click **Email Me** to receive an email with the picklist fields and the number of inactive values. This feature is available only for custom picklists with predefined values.



SEE ALSO:

[Salesforce Help: Get a List of Custom Picklist Fields with Inactive Values \(can be outdated or unavailable during release preview\)](#)

## Deliver to Your Customers with Custom Address Fields (Beta)

Improve address data accuracy and your users' experience with Custom Address Fields (beta). For example, add a Warehouse Address field to a standard or custom object. Users can populate a custom address field manually, or they can use the Google lookup to search for an address. Then you can access each address that's stored in a custom address field, either as a structured compound data type or as individual address components.

**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](#). To discuss the feature and ask questions, join the [Custom Address Fields Beta Program](#) group on the Trailblazer Community.

**How:** Before you enable custom address fields, review the [Custom Address Fields \(Beta\) Requirements and Limitations](#). Custom address fields use the State and Country picklists. By default, all countries, territories, and their states and provinces are visible to users. To specify the available picklist values in Salesforce, configure State and Country/Territory Picklists before you enable custom address fields.

SEE ALSO:

[Salesforce Help: Custom Address Fields \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Custom Address Fields Developer Guide \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Clean Up Inactive Picklist Values (Beta)

Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. You can now bulk delete inactive unused picklist values. Previously, custom picklists with many inactive values were difficult to maintain because you deleted inactive values one at a time.

**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](#).

**How:** Opt in to Bulk Delete Inactive Picklist Values (beta) from the Picklist Settings page. From the Inactive Values section of the picklist field, click **Delete Unused Values**. This feature is available only for custom picklists with predefined values.

Inactive Values				
		Delete Selected	Activate Selected	Replace Selected
		Delete Unused Values		
<input type="checkbox"/> Action	Values	API Name	Modified By	
<input type="checkbox"/> Del   <a href="#">Activate</a>	Country to country	Country to country	<a href="#">Admin User</a> , 2/11/2022, 9:32 AM	
<input type="checkbox"/> Del   <a href="#">Activate</a>	Exchange rate	Exchange rate	<a href="#">Admin User</a> , 2/11/2022, 9:14 AM	
<input type="checkbox"/> Del   <a href="#">Activate</a>	Locale adjustment	Locale adjustment	<a href="#">Admin User</a> , 2/11/2022, 9:14 AM	

After you delete unused values, if a picklist is unbound and the total number of inactive values falls below the limit, the picklist is set to bound.

SEE ALSO:

[Salesforce Help: Bulk Delete Inactive Picklist Values \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Bulk Manage Picklist Values (Beta)

Save more time managing your picklists. You can now delete, activate, deactivate, or replace multiple custom picklist field values at once. Previously, you modified them one at a time.

**Where:** This change applies to Lightning Experience and Salesforce Classic in all editions. Advanced Picklist Values Management (beta) is available in all sandboxes. To enable this feature in production, contact your account executive.



**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:** Opt in to Advanced Picklist Values Management (beta) from the Picklist Settings page. Then navigate to the custom field definition page. In the Values and Inactive Values sections, you see a checkbox next to each picklist value. You can select multiple values and use

one of the new buttons: **Delete Selected**, **Deactivate Selected**, **Replace Selected**, or **Activate Selected**. This feature is available only for custom picklists with predefined values.

Values					
<div> <a>New</a> <a>Reorder</a> <a>Replace</a> <a>Printable View</a> <a>Chart Colors</a> </div> <div> <a>Delete Selected</a> <a>Deactivate Selected</a> <a>Replace Selected</a> </div>					
<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> <a>Edit</a> <a>Del</a> <a>Deactivate</a>	Coupon	Coupon	<input type="checkbox"/>	Assigned dynamically	<a>Admin User</a> , 2/10/2022, 4:35 PM
<input type="checkbox"/> <a>Edit</a> <a>Del</a> <a>Deactivate</a>	Currency rate	Currency rate	<input type="checkbox"/>	Assigned dynamically	<a>Admin User</a> , 2/10/2022, 4:35 PM
<input checked="" type="checkbox"/> <a>Edit</a> <a>Del</a> <a>Deactivate</a>	Income	Income	<input type="checkbox"/>	Assigned dynamically	<a>Admin User</a> , 2/11/2022, 9:14 AM
<input checked="" type="checkbox"/> <a>Edit</a> <a>Del</a> <a>Deactivate</a>	Cost of living	Cost of living	<input type="checkbox"/>	Assigned dynamically	<a>Admin User</a> , 2/11/2022, 9:14 AM
<input type="checkbox"/> <a>Edit</a> <a>Del</a> <a>Deactivate</a>	Out of state	Out of state	<input type="checkbox"/>	Assigned dynamically	<a>Admin User</a> , 2/11/2022, 9:32 AM

Inactive Values				
<div> <a>Delete Selected</a> <a>Activate Selected</a> <a>Replace Selected</a> <a>Delete Unused Values</a> <small>Beta!</small> </div>				
<input type="checkbox"/> Action	Values	API Name	Modified By	
<input checked="" type="checkbox"/> <a>Del</a> <a>Activate</a>	Country to country	Country to country	<a>Admin User</a> , 2/11/2022, 9:32 AM	
<input type="checkbox"/> <a>Del</a> <a>Activate</a>	Exchange rate	Exchange rate	<a>Admin User</a> , 2/11/2022, 9:14 AM	
<input type="checkbox"/> <a>Del</a> <a>Activate</a>	Locale adjustment	Locale adjustment	<a>Admin User</a> , 2/11/2022, 9:14 AM	

#### SEE ALSO:

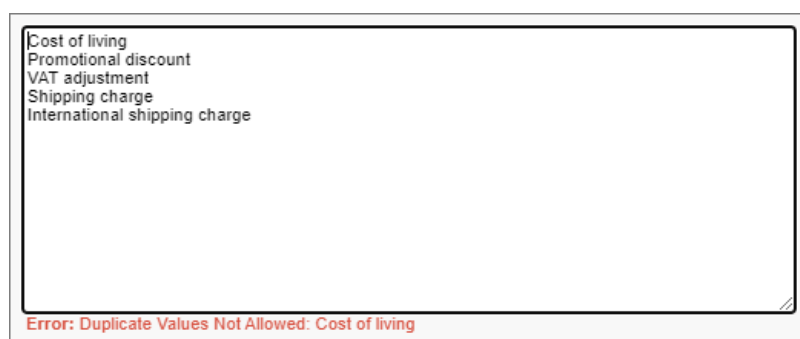
[Salesforce Help: Delete, Deactivate, Replace, or Activate Multiple Picklist Values \(Beta\)](#) (can be outdated or unavailable during release preview)

## Learn Which Picklist Values Are Duplicates

You now get a descriptive message that tells you which picklist values are duplicates when you add new picklist values. Previously, you saw a message that reported only that there were duplicate values.

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

**How:** From the Values section in the picklist field definition, click **New** to add new picklist values. When you click **Save**, any duplicate values are listed in the error message.



## Globalization

Enable the new locale format standard via a release update. Hmong and Punjabi are available as platform-only languages. The UI for Salesforce Maps and Loyalty Management is available in more languages. And translations changed 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 Hmong and Punjabi](#)

Hmong and Punjabi are now available as platform-only languages, and users can select the new Hmong (United States) and Punjabi (India) locales.

[Use Salesforce Maps and Loyalty Management in More Languages](#)

The Salesforce Maps UI is now available in Polish and our fully supported languages. The Loyalty Management UI is now available in Croatian, Polish, and Slovenian.

[Review Updated Label Translations](#)

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names in German, Japanese, Korean, and Norwegian.

## 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 Salesforce 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 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. From Setup, in the Quick Find box, enter *User Interface*, and select **User Interface**. Then select **Enable ICU formats for en\_CA locale**, and save your changes.

## SEE ALSO:

[Salesforce Help: Go Global with New International Locale Formats \(can be outdated or unavailable during release preview\)](#)

[Trailblazer Community Group: ICU Locale Formats Adoption](#)

[Release Updates](#)

## Connect with Customers Who Speak and Read Hmong and Punjabi

Hmong and Punjabi are now available as platform-only languages, and users can select the new Hmong (United States) and Punjabi (India) locales.

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

SEE ALSO:

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

[Salesforce Help: Select Your Language, Locale, and Currency \(can be outdated or unavailable during release preview\)](#)

## Use Salesforce Maps and Loyalty Management in More Languages

The Salesforce Maps UI is now available in Polish and our fully supported languages. The Loyalty Management UI is now available in Croatian, Polish, and Slovenian.

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

SEE ALSO:

[Salesforce Help: User Interface Language Support \(can be outdated or unavailable during release preview\)](#)

## Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names in German, Japanese, Korean, and Norwegian.

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

**How:** To review the changes, see the knowledge article, [Summer '22 Translated Terminology Update](#), and download the attached list of changes. If you want to use a different translation for tab and field labels, you can change the name.

SEE ALSO:

[Salesforce Help: Rename Object, Tab, and Field Names \(can be outdated or unavailable during release preview\)](#)

## Permissions

Create permission set and permission set group assignments with an expiration date, and review the release update for this change. And monitor the assignment of critical user permissions by creating transaction security policies.

IN THIS SECTION:

[Enable Permission Set Expiration and Enhanced UI \(Release Update\)](#)

With this update enabled, you can assign an expiration date to each permission set or permission set group. Permission set and permission set group assignments also use a new Lightning Experience interface and an improved workflow. Users can be assigned to permission sets or permission set groups with or without an expiration date. When a permission set or permission set group has an expiration date, users can lose access to functionality after the expiration date. By default, permission set and permission set group assignments don't expire. This update was first available in Summer '22.

[Manage Permission Set Assignment Expiration with an Enhanced User Experience \(Generally Available\)](#)

How you manage assignments of permission sets and permission set groups has been simplified, and this feature is now generally available. After you enable this feature in User Management Settings, you can access the improved interface with the Manage Assignments button. As part of this change, we deprecated the Manage Assignment Expiration button.

### [Create Transaction Security Policies for Critical User Permissions \(Generally Available\)](#)

Use transaction security policies, now generally available, to monitor changes made in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create policies to notify you and block changes. You can also track multi-factor authentication for user interface logins.

### [Manage Your Permission Assignments with the User Access and Permissions Assistant](#)

Analyze and report on permission assignments with the User Access and Permissions Assistant. Manage your permission set groups easily, and convert to permission sets that you can assign. Previously, this feature was known as Permissions Helper.

## Enable Permission Set Expiration and Enhanced UI (Release Update)

With this update enabled, you can assign an expiration date to each permission set or permission set group. Permission set and permission set group assignments also use a new Lightning Experience interface and an improved workflow. Users can be assigned to permission sets or permission set groups with or without an expiration date. When a permission set or permission set group has an expiration date, users can lose access to functionality after the expiration date. By default, permission set and permission set group assignments don't expire. This update was first available in Summer '22.

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

**When:** Salesforce enforces this update in Winter '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For **Enable Permission Set & Permission Set Group Assignments with Expiration Dates**, follow the testing and activation steps.

SEE ALSO:

[Manage Permission Set Assignment Expiration with an Enhanced User Experience \(Generally Available\)](#)

[Salesforce Help: Permission Set and Permission Set Group Assignment Expiration \(can be outdated or unavailable during release preview\)](#)

## Manage Permission Set Assignment Expiration with an Enhanced User Experience (Generally Available)

How you manage assignments of permission sets and permission set groups has been simplified, and this feature is now generally available. After you enable this feature in User Management Settings, you can access the improved interface with the Manage Assignments button. As part of this change, we deprecated the Manage Assignment Expiration button.

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

**Why:** For example, you have a consultant team that must evaluate sales contracts as part of a project with a set end date. The consultants need access to the Contract object and other permissions via a permission set group. When the project ends, you don't want the consultant team to access the sales contracts any longer.

You first create a filter for the users based on their location. You can potentially have thousands of users, so a filter lets you easily select the users working on the project. Then you assign these users to the permission set group and set the expiration date as the project's end.

**How:** Enable **Permission Set & Permission Set Group Assignments with Expiration Dates** in User Management Settings. Then from the Permission Set Group or Permission Set page, click **Manage Assignment**.



On the Current Assignments page, view a list of the users that are assigned to the permission set or the permission set group. To create a user assignment, click **Add Assignment**. On the Add Assignment page, search for users in the list with the search field. To create a filtered view of users, create a list view, and then select the filter icon and set your filter logic.

SEE ALSO:

[Enable Permission Set Expiration and Enhanced UI \(Release Update\)](#)

[Salesforce Help: Permission Set and Permission Set Group Assignment Expiration \(can be outdated or unavailable during release preview\)](#)

## Create Transaction Security Policies for Critical User Permissions (Generally Available)

Use transaction security policies, now generally available, to monitor changes made in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create policies to notify you and block changes. You can also track multi-factor authentication for user interface logins.

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

SEE ALSO:

[Monitor Critical User Permissions \(Generally Available\)](#)

[Developer Guide: PermissionSetEvent \(can be outdated or unavailable during release preview\)](#)

[Developer Guide: PermissionSetEventStore \(can be outdated or unavailable during release preview\)](#)

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

## Manage Your Permission Assignments with the User Access and Permissions Assistant

Analyze and report on permission assignments with the User Access and Permissions Assistant. Manage your permission set groups easily, and convert to permission sets that you can assign. Previously, this feature was known as Permissions Helper.

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

**How:** To use this feature, download the app from AppExchange. Complete the tasks to enable the Tooling API for the app. And then create and assign permission sets for users who must access the app.

SEE ALSO:

[Salesforce Help: User Access and Permissions Assistant \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Install the User Access and Permissions Assistant \(can be outdated or unavailable during release preview\)](#)

## External Services

Register more APIs, update more External Services registrations, and call your External Service registrations directly from Apex.

IN THIS SECTION:

[Call External Services Registrations Natively from Apex](#)

Now you can access External Services registered actions directly from Apex to tap into reusable functionality when writing Apex code. Previously, actions created through External Services were exposed exclusively for invocation through Flow or Einstein Bots.

### [Update an Existing Schema Connected to Flow](#)

If a registration is in use by a flow, now you can update it with a new, compatible API specification version. Previously, you couldn't update a registered schema that was in use by a flow. If the new schema version isn't compatible, the edit workflow notifies you which operations and schema objects are in use by which flows and by which Apex classes. With this information, you know which existing references are incompatible so that you can remove them before saving your updated registration.

### [Register More APIs](#)

Now you can register an external service without manually editing the schema before registration to conform to the 80-character limit for derived operation and object developer names. This enables you to register more APIs with less friction.

## Call External Services Registrations Natively from Apex

Now you can access External Services registered actions directly from Apex to tap into reusable functionality when writing Apex code. Previously, actions created through External Services were exposed exclusively for invocation through Flow or Einstein Bots.

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

**How:** The registered services are strongly typed in Apex with the registration's schema as Apex types that reflect your registered service's specification. This process is similar to making a callout to an external service with the Apex `Http Class`, but without writing boilerplate code.

SEE ALSO:

[Salesforce Help: Invoke External Service Callouts Using Apex \(can be outdated or unavailable during release preview\)](#)

## Update an Existing Schema Connected to Flow

If a registration is in use by a flow, now you can update it with a new, compatible API specification version. Previously, you couldn't update a registered schema that was in use by a flow. If the new schema version isn't compatible, the edit workflow notifies you which operations and schema objects are in use by which flows and by which Apex classes. With this information, you know which existing references are incompatible so that you can remove them before saving your updated registration.

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

SEE ALSO:

[Salesforce Help: Edit, Delete, Save As, and View an External Service \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Appendix 1: Schema Update Considerations \(can be outdated or unavailable during release preview\)](#)

## Register More APIs

Now you can register an external service without manually editing the schema before registration to conform to the 80-character limit for derived operation and object developer names. This enables you to register more APIs with less friction.

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

**How:** For all new registrations, names are resolved automatically. For existing registrations where an operation activation was prevented due to naming constraints, make a copy of the registration by following the Save As instructions in [Edit, Delete, Save As, and View an External Service](#). The names for all operations are then resolved automatically.

SEE ALSO:

[External Services: External Services Considerations \(see the External Service Apex Class Names and Developer Names section\)](#)

## Salesforce Connect

Salesforce Connect adapter for Amazon DynamoDB (generally available) and Salesforce Connect adapter for Amazon Athena (pilot) integrate AWS data natively with Salesforce business applications and take advantage of the features offered by the Salesforce Platform.

### IN THIS SECTION:

#### [Securely Connect Data Across Amazon DynamoDB and Salesforce \(Generally Available\)](#)

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.

#### [Securely Connect to Amazon Athena and Perform Interactive Queries from Salesforce \(Pilot\)](#)

Use the new Salesforce Connect adapter for Amazon Athena to integrate AWS data natively with Salesforce and run interactive ad hoc queries. Take advantage of Amazon Athena's capability to analyze structured data in a variety of formats and get fast query results even when you perform complex queries on large datasets.

## Securely Connect Data Across Amazon DynamoDB and Salesforce (Generally Available)

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.

**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 more.
- Define object relationships for data captured in single-table or multi-table design patterns.
- Access DynamoDB data mapped to external objects programmatically via SOQL and Apex, including DML.

**How:** Use the Amazon DynamoDB type to define an external data source and connect Salesforce to data that's stored in DynamoDB.


### SEE ALSO:

[Salesforce Help: Access External Data with the Salesforce Connect Adapter for Amazon DynamoDB \(can be outdated or unavailable during release preview\)](#)

## Securely Connect to Amazon Athena and Perform Interactive Queries from Salesforce (Pilot)

Use the new Salesforce Connect adapter for Amazon Athena to integrate AWS data natively with Salesforce and run interactive ad hoc queries. Take advantage of Amazon Athena's capability to analyze structured data in a variety of formats and get fast query results even when you perform complex queries on large datasets.

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

 **Note:** Salesforce Connect adapter for Amazon Athena 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:** Use the Amazon Athena type to define an external data source and connect Salesforce to the interactive query service. To participate in the pilot program, contact your Salesforce account executive.

SEE ALSO:

[Salesforce Help: Work with External Data Sources](#)

## Einstein Prediction Builder

Discover the new Guided Setup flow to build predictions. The new flow lets you quickly iterate your predictions and save your settings so you can build when you're ready. Data Checker also automatically checks if you have enough records to build and lets you know whether you can build successfully.

IN THIS SECTION:

[Validate Your Predictions Automatically with Data Checker](#)

Build AI predictions with confidence and save time. Data Checker now validates whether you have enough data before you build and provides alerts you as go. Simply adjust your settings, if needed, to successfully build a prediction.

[Enable Einstein Prediction Builder with Guided Setup](#)

Build AI-powered predictions with ease. Use the new guided setup flow for more context in each stage in the build process and build relevant prediction models for your business. Catch errors early and iterate as you go. You can even save your settings and build when you're ready.

## Validate Your Predictions Automatically with Data Checker

Build AI predictions with confidence and save time. Data Checker now validates whether you have enough data before you build and provides alerts you as go. Simply adjust your settings, if needed, to successfully build a prediction.

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

**Who:** This feature is available to admins with CRM Analytics Plus, Einstein Predictions, EinsteinBuilderFree, or Platform Plus licenses.

**Why:** As you build your prediction, Data Checker provides a status and summary of your data at the top of each Einstein Prediction Builder page.

Let's say you want to predict the likelihood of winning an opportunity. In Einstein Prediction Builder, you choose the Opportunity object. You then segment your data for a specific region and define example records (past won and lost opportunities) that Einstein must learn from. As you define your prediction fields and records to predict on your dataset narrows down further. Data Checker checks whether you have enough data from the time you create a prediction until you build. It checks for the completeness of data and provides a summary so you can adjust your data and settings before you build.

As you build, Data Checker gives you feedback about your prediction data.

A checkmark indicates the prediction has enough data to build successfully.

The screenshot shows the 'Data Checker' panel with a green header and a checkmark icon. The text states: 'Einstein checks your data to see if you have enough records to build a prediction.' Below this is a table with two columns: 'Records' and 'Required'.

	Records	Required
✓ All Account records	9,170	400
✓ Example Records	1,384	400
✓ Records to Predict	7,786	1

Below the table, there is a note: 'Matched data in your Salesforce org. Using clicks not code, quickly configure your data and input settings. You can build intelligent predictions that get smarter over time.'

A question mark indicates Data Checker couldn't get an accurate record count but you can still build the prediction.

The screenshot shows the 'Data Checker' panel with a grey header and a question mark icon. A 'Retry Data Checker' link is at the top. The text states: 'Einstein checks your data to see if you have enough records to build a prediction.' Below this is a table with two columns: 'Records' and 'Required'.

	Records	Required
✓ All Account records	9,170	400
✓ Example Records	1,384	400
ⓘ ? Records to Predict	?	1

Below the table, there is a section titled 'Resolve the error' with the following list:

- Adjust your filter settings.
- Retry Data Checker.
- If you still run into issues, contact Salesforce Support.

An error indicates you don't have enough records to build the prediction with your current settings. Data Checker also warns you when the same records are used in your Yes and No Examples.

The screenshot shows the 'Data Checker' panel with a red header and an error icon. The text states: 'Einstein checks your data to see if you have enough records to build a prediction.' Below this is a table with two columns: 'Records' and 'Required'.

	Records	Required
✗ Segment of Account records	148	400
> ✗ Example Records	148	400
> ✗ Records to Predict	0	1

Below the table, there is a section titled 'Resolve the error' with the following list:

- Not enough segment records. Adjust your Segment filter settings and try again.

## Enable Einstein Prediction Builder with Guided Setup

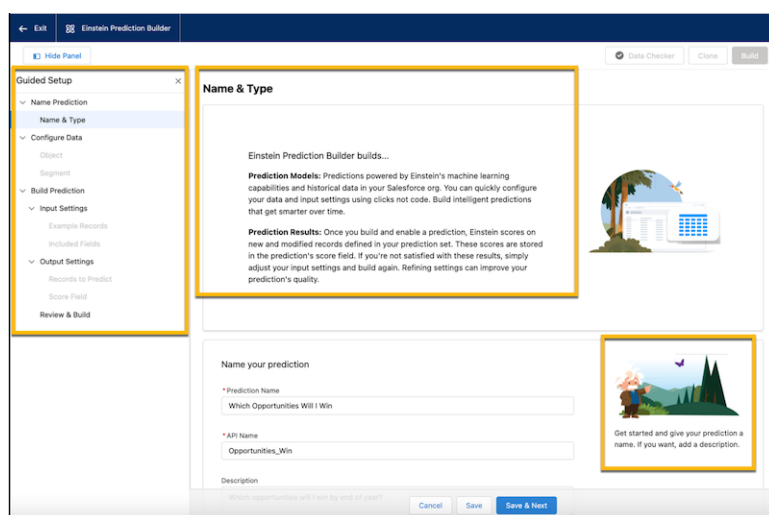
Build AI-powered predictions with ease. Use the new guided setup flow for more context in each stage in the build process and build relevant prediction models for your business. Catch errors early and iterate as you go. You can even save your settings and build when you're ready.

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

**Who:** This feature is available to admins with the CRM Analytics Plus, Einstein Predictions, EinsteinBuilderFree, or Platform Plus licenses.

**Why:** Guided Setup walks you through setup choices, allowing for optimization of data and settings as you build. Using learning cards, useful tips, and Salesforce Help, the new setup flow guides you through each stage of building. It also differentiates the input and output settings so you can understand how these settings affect your prediction model:

- Input settings: Example records and included fields
- Output settings: Records to predict on and score field



As you build, Data Checker checks the completeness of your Salesforce data and provides a detailed summary. It indicates issues early so you can build successfully.

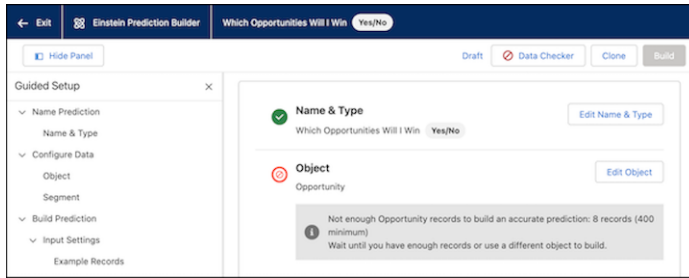
Draft

Data Checker

Einstein checks your data to see if you have enough records to build a prediction.

	Records	Required
Segment of Account records	148	400
<div> Resolve the error <ul style="list-style-type: none"> <li>Not enough segment records. Adjust your Segment filter settings and try again.</li> </ul> </div>		
Example Records	148	400
Records to Predict	0	1

If issues aren't resolved as you build, you get a summary your data in the relevant section in Review and Build page. With the Guided Setup, simply adjust your settings until you have enough records to build successfully.



## General Setup

Say goodbye to the page layout when customizing related lists. Now you can customize them right in the Lightning App Builder with the new Dynamic Related List - Single component. Say hello to 19 new Date and Time, Math, and Text functions to make your formulas even more robust.

### IN THIS SECTION:

#### [Customize and Filter Related Lists in the Lightning App Builder](#)

Customize related lists directly from the Lightning App Builder instead of the page layout editor with the new Dynamic Related List – Single component. Choose the list's fields and sort order, apply filters, and give the list a descriptive name. To see the most relevant records, set up two or more related lists with different filters on the same object. For example, on the Contact record page, create one related list to see only the opportunities created in the last 30 days. Then, create a second related list to see all opportunities with an amount over \$500,000.

#### [Strengthen Formulas with New Functions](#)

Make your formulas more robust by using the new Date and Time, Math, and Text functions. Unless specified otherwise, you can use the new functions everywhere that you include a formula, such as formula fields, validation rules, approval processes, and workflow rules.

## Customize and Filter Related Lists in the Lightning App Builder

Customize related lists directly from the Lightning App Builder instead of the page layout editor with the new Dynamic Related List – Single component. Choose the list's fields and sort order, apply filters, and give the list a descriptive name. To see the most relevant records, set up two or more related lists with different filters on the same object. For example, on the Contact record page, create one related list to see only the opportunities created in the last 30 days. Then, create a second related list to see all opportunities with an amount over \$500,000.

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

### SEE ALSO:

[Salesforce Help: Standard Lightning Page Components \(can be outdated or unavailable during release preview\)](#)

## Strengthen Formulas with New Functions

Make your formulas more robust by using the new Date and Time, Math, and Text functions. Unless specified otherwise, you can use the new functions everywhere that you include a formula, such as formula fields, validation rules, approval processes, and workflow rules.

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

**How:** Grouped by type, here are the new functions for building formulas.

Type	Function	Description
Date and Time	DAYOFYEAR	Returns the day of the calendar year (from 1 through 366).
Date and Time	FORMATDURATION	Formats the number of seconds with optional days, or the difference between times or dateTimes as HH:MM:SS.
Date and Time	ISOWEEK	Returns the ISO 8601-week number (from 1 through 53) for the given date, ensuring that the first week starts on a Monday.
Date and Time	ISOYEAR	Returns the ISO 8601 week-numbering year in four digits for the given date, ensuring that the first day is a Monday.
Date and Time	UNIXTIMESTAMP	Returns the number of seconds since 1 Jan 1970 for the given date, or number of seconds in the day for a time.
Math	ACOS	Returns the arc cosign of the number in radians, if the given number is between -1 and 1. Otherwise returns NULL.
Math	ASIN	Returns the arc sine of the number in radians, if the given number is from -1 through 1. Otherwise returns NULL.
Math	ATAN	Returns the arc tangent of the number in radians.
Math	ATAN2	Returns the arc tangent of the quotient of y and x in radians.
Math	CHR	Returns a string with the first character's code point as the given number.
Math	COS	Returns the cosine of the number in radians, if the given number is between -1 and 1. Otherwise returns NULL.
Math	FROMUNIXTIME	Returns the dateTime that represents the given number as the seconds elapsed since 1 Jan 1970.
Math	PI	Returns pi.
Math	PICKLISTCOUNT	Returns the number of selected values in a multi-select picklist.
Math	SIN	Returns the sine of the number, where the number is given in radians.
Math	TAN	Returns the tangent of the number, where the number is given in radians.
Math	TRUN	Truncates a number to a specified number of digits.
Text	ASCII	Returns the first character's code point from the given string as a number.



Type	Function	Description
Text	INITCAP	Returns the text as lowercase with the first character of each word in uppercase.

SEE ALSO:

[Salesforce Help: Formula Operators and Functions by Context](#)(can be outdated or unavailable during release preview)

## Development

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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](#)

Light DOM is in beta. Use new modules instead of native APIs to create notifications from your Lightning web components. Debug your code running with Lightning Web Security more easily.

#### [Einstein Vision](#)

Use the power of artificial intelligence (AI) to add personalization to documents. Extract structured data from custom forms and invoices with Einstein OCR (beta).

#### [Visualforce](#)

Increase the security of your Visualforce pages by reviewing and enabling these release updates.

#### [Apex](#)

The user mode database operations feature is now in beta. Use the new `scope` attribute in the `@AuraEnabled` annotation to enable global caching of Apex controller methods. You can't overload `@AuraEnabled` methods. Call invocable actions from Apex code using the `Invocable.Action` class methods.

#### [API](#)

Improvements have been made to the API, a GraphQL API is available (Beta), and legacy versions have been retired or deprecated.

#### [Packaging](#)

Determine which Apex classes have insufficient code coverage. Create licenses for specific features and user categories with the Partner Licensing Platform.

#### [Development Environments](#)

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

#### [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.

#### [DevOps Center \(Beta\)](#)

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps best practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

#### [Salesforce Functions](#)

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

### [AppExchange Partners](#)

Analyze external object usage with AppExchange App Analytics.

### [Change Data Capture](#)

Use TextArea fields to enrich change events. Filter your change event stream (pilot).

### [Platform Events](#)

Use custom channels to group platform events into one stream. Filter your event stream (beta). Get the result of asynchronous event publishing in Apex (pilot).

### [Event Bus](#)

Use the Pub/Sub API to publish and subscribe to events. Stream your Salesforce events to Amazon EventBridge (Beta).

### [New and Changed Items for Developers](#)

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

## Lightning Components

Light DOM is in beta. Use new modules instead of native APIs to create notifications from your Lightning web components. Debug your code running with Lightning Web Security more easily.



**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:

#### [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.

#### [Synthetic Shadow Aligns Closer to Native Shadow](#)

Prepare for native shadow DOM with changes to synthetic shadow that follow web standards.

#### [Relaxed Save-Time Validation Rules for Aura Components](#)

When you save an Aura component, some general JavaScript validation rules are now removed. The rules are still available in the Aura plugin for ESLint. Validations using ESLint are done separately from saving your code to Salesforce. The linting results are informational only.

#### [Create Notifications with New Alert, Confirm, and Prompt Modules](#)

Use the new modules `LightningAlert`, `LightningConfirm`, and `LightningPrompt` instead of native APIs to create notifications from your Lightning web components. Chrome and Safari plan to end support for cross-origin use of the `window.alert()`, `window.confirm()`, and `window.prompt()` native APIs. Each new module creates a modal that functions like its API counterpart and works in cross-origin iframes.

#### [Debug Your Code More Easily to Run with Lightning Web Security](#)

Dig deep into your code as it runs with Lightning Web Security. Now you have greater visibility into your code as it runs in a JavaScript sandbox. Previously, you saw your source code with Lightning Web Security's runtime changes in your web developer tools, which could make it difficult to find problems in your code. The features are optimized for Chrome DevTools.

#### [Improved User Experience for LWS Distortion Viewer](#)

The LWS Distortion Viewer tool makes it easier for you to find information about Lightning Web Security's dynamic modifications to web APIs.

### [Distortions Added to Lightning Web Security](#)

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

### [Disable Pull-to-Refresh in Mobile Components](#)

Fire a custom event from a Lightning component to disable pull-to-refresh on any screen in the Salesforce mobile app that contains the component. Disabling pull-to-refresh reduces the possibility of losing in-progress work by accidentally refreshing a page while you're entering data.

### [Access Device Contacts from a Lightning Web Component](#)

Use the ContactsService API to create a customized contact import feature, create or update records with contact data, or otherwise reduce the friction of adding contact information to Salesforce from a mobile device.

### [Build Components in Mixed Shadow Mode \(Developer Preview\)](#)

With mixed shadow mode, Lightning web components can use native shadow DOM even when the synthetic shadow polyfill is applied.

### [Use Salesforce Page Objects with UTAM](#)

Write UI tests for Lightning Experience and the Salesforce mobile app using JavaScript or Java page objects provided by Salesforce. These page objects help you to use UI Test Automation Model (UTAM) to test custom Lightning web components and interact with many of the UI elements built by Salesforce.

### [Enable Secure Static Resources for Lightning Components \(Update, Postponed\)](#)

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## 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 in 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](#).

Light DOM is generally available for Experience Builder sites.

**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>
    <p>Hello World</p>
  </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>
    <p>Hello World</p>
  </my-header>
</my-app>
```

 **Tip:** If you see Salesforce CLI or lint errors, update the Salesforce CLI and the Salesforce Extension Pack (Expanded) in VS Code.

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.

LWC doesn't scope styles automatically for you. To prevent styles from bleeding in or out of a component, use a `*.scoped.css` file to implement scoped styles for a component.

Importantly, 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.

#### SEE ALSO:

[Lightning Web Components Developer Guide: Light DOM \(can be outdated or unavailable during release preview\)](#)

[LWR Sites for Experience Cloud: Pages and Components in the LWR Template](#)

[Salesforce CLI Setup Guide: Update Salesforce CLI](#)

## Synthetic Shadow Aligns Closer to Native Shadow

Prepare for native shadow DOM with changes to synthetic shadow that follow web standards.

**Where:** This change applies to Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

**Why:** Many developers have depended on several characteristics of synthetic shadow that are non-standard. As LWC prepares to migrate to native shadow DOM, these changes can result in minor differences between synthetic and native shadow.

**How:** LWC has corrected these non-standard behaviors in synthetic shadow.

- Previously, `assignedSlot` returned `null` when you created a slotted element outside of synthetic shadow DOM on a page that contains both native and synthetic shadow DOM. LWC now returns the `<slot>` element correctly.
- Previously, `elementsFromPoint` returned only elements that were visible in the DOM when shadow DOM is involved. LWC now returns all elements to match the browser's native behavior.

## Relaxed Save-Time Validation Rules for Aura Components

When you save an Aura component, some general JavaScript validation rules are now removed. The rules are still available in the Aura plugin for ESLint. Validations using ESLint are done separately from saving your code to Salesforce. The linting results are informational only.

**Where:** This change applies to Aura components in Lightning Experience and Salesforce Classic.

**How:** ESLint uses many more general JavaScript rules to analyze your component code compared to save-time validations, which focus on specific rules written and maintained by Salesforce. Validation with ESLint gives you more information.

To continue to use the general JavaScript rules that were removed from save-time validation, use the [Aura plugin for ESLint](#).

SEE ALSO:

[Lightning Aura Components Developer Guide: Validations for Aura Component Code](#)

## Create Notifications with New Alert, Confirm, and Prompt Modules

Use the new modules `LightningAlert`, `LightningConfirm`, and `LightningPrompt` instead of native APIs to create notifications from your Lightning web components. Chrome and Safari plan to end support for cross-origin use of the `window.alert()`, `window.confirm()`, and `window.prompt()` native APIs. Each new module creates a modal that functions like its API counterpart and works in cross-origin iframes.

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

**Why:** For more information about the end of support from Chrome and Safari, see [Preparing Your Components for the Removal of `alert\(\)`/`confirm\(\)`/`prompt\(\)`](#).

**How:** Unlike the `window.*()` APIs, these modules' `.open()` functions don't halt execution on the page, and they each return a promise. Use `async/await` or `.then()` for any code that you want to execute after the modal closes.

These examples show how to use `LightningAlert`, `LightningConfirm`, and `LightningPrompt` in Lightning web components. See [New and Changed Aura Components](#) on page 243 for examples using Aura syntax with the `lightning:alert`, `lightning:confirm`, and `lightning:prompt` components.

This example creates an alert modal with an error message and "OK" button. The `.open()` function returns a promise that resolves when the user clicks "OK."

```
<!-- c/myApp.html -->
<template>
  <lightning-button onclick={handleAlertClick} label="Open Alert Modal">
  </lightning-button>
</template>
```

```
// c/myApp.js
import { LightningElement } from 'lwc';
import LightningAlert from 'lightning/alert';

export default class MyApp extends LightningElement {
  async handleAlertClick() {
    await LightningAlert.open({
      message: 'this is the alert message',
      theme: 'error', // a red theme intended for error states
      label: 'Error!', // this is the header text
    });
    //Alert has been closed
  }
}
```

```

    }
}

```

This example creates a headerless confirm modal with two buttons, "OK" and "Cancel". The `.open()` function returns a promise that resolves to `true` when the user clicks "OK" and `false` when they click "Cancel."

```

<!-- c/myApp.html -->
<template>
    <lightning-button onclick={handleConfirmClick} label="Open Confirm Modal">
    </lightning-button>
</template>

```

```

// c/myApp.js
import { LightningElement } from 'lwc';
import LightningConfirm from 'lightning/confirm';

export default class MyApp extends LightningElement {
    async handleConfirmClick() {
        const result = await LightningConfirm.open({
            message: 'this is the prompt message',
            variant: 'headerless',
            label: 'this is the aria-label value',
            // setting theme would have no effect
        });
        //Confirm has been closed
        //result is true if OK was clicked
        //and false if cancel was clicked
    }
}

```

This example creates a prompt modal with a header, message, and two buttons. If the user inputs text and clicks "OK" in the prompt, the `.open()` function returns a promise that resolves to the input value, but if the user clicks "Cancel" it resolves to `null`.

```

<!-- c/myApp.html -->
<template>
    <lightning-button onclick={handlePromptClick} label="Open Prompt Modal">
    </lightning-button>
</template>

```

```

// c/myApp.js
import { LightningElement } from 'lwc';
import LightningPrompt from 'lightning/prompt';

export default class MyApp extends LightningElement {
    handlePromptClick() {
        LightningPrompt.open({
            message: 'this is the prompt message',
            //theme defaults to "default"
            label: 'Please Respond', // this is the header text
            defaultValue: 'initial input value', //this is optional
        }).then((result) => {
            //Prompt has been closed
            //result is input text if OK clicked
            //and null if cancel was clicked
        });
    }
}

```

```

    }
}

```

SEE ALSO:

[Component Library](#)[Blog Post: Preparing Your Components for the Removal of `alert\(\)`/`confirm\(\)`/`prompt\(\)`](#)

## Debug Your Code More Easily to Run with Lightning Web Security

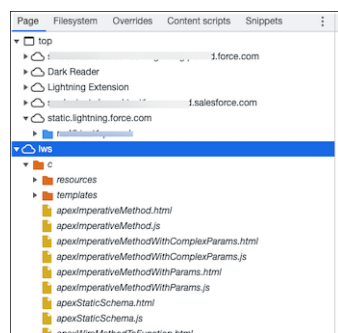
Dig deep into your code as it runs with Lightning Web Security. Now you have greater visibility into your code as it runs in a JavaScript sandbox. Previously, you saw your source code with Lightning Web Security's runtime changes in your web developer tools, which could make it difficult to find problems in your code. The features are optimized for Chrome DevTools.

**Where:** This change applies to Lightning Experience in all editions and Experience Cloud sites.

**How:** Debugging improvements occur at two levels. Some are available by default when you enable debug mode in Salesforce. Others require you to select a setting in Chrome DevTools.

Enable [Debug Mode](#) for your Salesforce user account to see these improvements in source display while debugging your component code as it runs in a Salesforce org.

- Source location has changed so that you can find your files more easily in the Page tab of the Sources panel. Instead of the `lightning/n/modules` folder, look for the `lws` folder. Expand the folder and see your component files organized under their namespace folder. Here you see the `c` namespace and its components on the current page.



- Source mapping is improved so that the sandboxed code in the `lws` folder now looks closer to your components' source code. You can inspect it, use breakpoints, and so on, in the Sources panel.

In Chrome DevTools, set **Enable console formatter** to see these additional debugging improvements.

- Improved stack trace display in the Console filters out LWS calls to give you a clearer picture of errors in your components.
- Informative console logs show information about LWS in `console` methods such as `console.warn` and `console.info`. For example, `console.warn` is called when an object mutation is tracked on one side of the sandbox and not the other.

SEE ALSO:

[Lightning Web Components Developer Guide: Debug with LWS Enabled](#)

## Improved User Experience for LWS Distortion Viewer

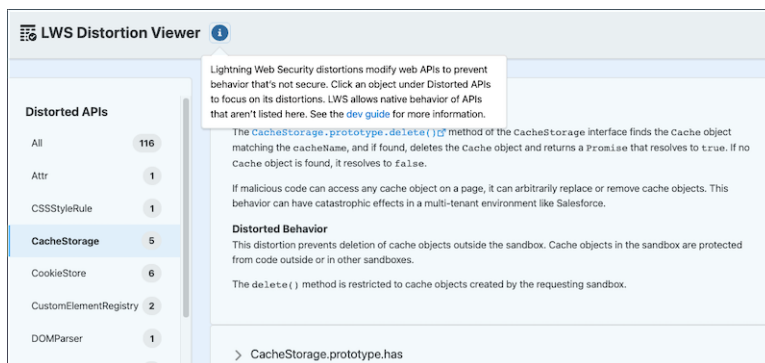
The LWS Distortion Viewer tool makes it easier for you to find information about Lightning Web Security's dynamic modifications to web APIs.

**Where:** This change applies to the [LWS Distortion Viewer](#) in the Lightning Component Library.

**Why:** These improvements make the tool more informative and easier to use.

- Distortions added to LWS in this release are included.
- An info button after the Distortion Viewer title shows brief instructions and a link to Distortion Viewer documentation in the Lightning Web Components Developer Guide.
- The Distortion APIs panel on the left side scrolls independently instead of together with the content panel, making it easier to find APIs and view distortion documentation.
- The Filter list was removed.

Here you can see the info bubble in the updated LWS Distortion Viewer.



SEE ALSO:

[Distortions Added to Lightning Web Security](#)

[Lightning Web Components Developer Guide: Look Up Distortion Details in LWS Distortion Viewer](#)

## Distortions Added to Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

These APIs have distortions documented in the [LWS Distortion Viewer](#).

- `CSSStyleRule.prototype.style` getter
- `CacheStorage.prototype.delete`
- `CacheStorage.prototype.has`
- `CacheStorage.prototype.keys`
- `CacheStorage.prototype.match`
- `CacheStorage.prototype.open`
- `Document.prototype.replaceChildren`
- `History.prototype.pushState`
- `History.prototype.replaceState`
- `Navigator.sendBeacon`



- `Node.prototype.insertBefore`
- `Node.prototype.removeChild`
- `Node.prototype.replaceChild`
- `Notification` Constructor
- `Range.prototype.deleteContents`
- `Range.prototype.extractContents`
- `Range.prototype.insertNode`
- `SVGAnimateElement: attributeName attribute`
- `SVGAnimateElement: from attribute`
- `SVGAnimateElement: to attribute`
- `SVGAnimateElement: values attribute`
- `SVGElement.prototype.nonce`
- `SVGSetElement: attributeName attribute`
- `SVGSetElement: to attribute`
- `TrustedTypePolicyFactory.createPolicy`
- `Window.prototype.getComputedStyle`
- `WindowEventHandles.onstorage`
- `Window.prototype.postMessage`
- `Window.prototype.structuredClone`
- `XSLTProcessor.prototype.transformToDocument`
- `XSLTProcessor.prototype.transformToDocument`
- `XSLTProcessor.prototype.transformToFragment`
- `XSLTProcessor.prototype.transformToFragment`

For information about ESLint rules, see [Install ESLint Rules for Lightning Web Security](#).

#### SEE ALSO:

[Lightning Web Components Developer Guide: Look Up Distortion Details in LWS Distortion Viewer](#)

[Lightning Web Components Developer Guide: Install ESLint Rules for Lightning Web Security](#)

## Disable Pull-to-Refresh in Mobile Components

Fire a custom event from a Lightning component to disable pull-to-refresh on any screen in the Salesforce mobile app that contains the component. Disabling pull-to-refresh reduces the possibility of losing in-progress work by accidentally refreshing a page while you're entering data.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in all editions except Database.com. This event has no effect in Lightning Experience or Salesforce Classic.

**When:** This feature is available starting the week of June 13, 2022.

**Why:** Pull-to-refresh is a long-established convention in mobile apps as a way to reload data on a mobile app screen. Using pull-to-refresh replaces the need to add a refresh or reload button to every page. It's the default behavior for nearly all screens in the Salesforce mobile app. When you're accessing read-only data such as a browsing a list or viewing a record, there's no risk of data loss if you intentionally or accidentally pull-to-refresh.

However, if you're composing or writing data—such as entering text into text fields on a new record screen or following a custom, multi-step workflow—there's potential for data loss if you trigger a refresh. Pull-to-refresh reloads the current page without preserving any kind of state. This refresh takes you back to the original, empty page state, losing anything you've entered along the way. Not cool.

**How:** Pull-to-refresh can be disabled by firing a `CustomEvent` in JavaScript, which you can do from both Lightning web components and Aura components. Pull-to-refresh is disabled on any page that includes a component that fires this event. You can add the component to a page in code, or you can add the component to a page using, for example, Lightning App Builder.

For additional details and complete code examples, see [“Disable Pull-to-Refresh in the Salesforce Mobile App”](#) (can be outdated or unavailable during release preview) in the *Lightning Web Components Developer Guide*.

## Access Device Contacts from a Lightning Web Component

Use the `ContactsService` API to create a customized contact import feature, create or update records with contact data, or otherwise reduce the friction of adding contact information to Salesforce from a mobile device.

**Where:** This change applies to the Mobile Publisher apps.



**Note:** Using the `ContactsService` API to create contact-based features works only in the mobile app, and not on mobile or desktop web.

**Why:** Long gone are the days of the paper address book. Today, everyone carries dozens or hundreds of contacts everywhere they go. Their address book is on the device where they're most likely to use it: their phone, or another mobile device. `ContactsService` makes it possible to develop a contact import process tailored to *your* audience, ensuring that you reach them wherever they are.

**How:** Using `ContactsService` in your Lightning web component is straightforward.

1. Import `ContactsService` into your component definition.
2. Test to make sure `ContactsService` is available before you call contacts-related functions.
3. Use the `getContacts()` function to select and access contacts.

For complete details, see [Access Contacts on a Mobile Device](#) in the *Lightning Web Components Developer Guide* (can be outdated or unavailable during release preview).

## Build Components in Mixed Shadow Mode (Developer Preview)

With mixed shadow mode, Lightning web components can use native shadow DOM even when the synthetic shadow polyfill is applied.

**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:** Mixed shadow mode is available as a developer preview. This 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:** All major browsers now support [shadow DOM](#). Salesforce maintains the [synthetic shadow polyfill](#) for legacy browsers such as older versions of Microsoft Edge. To simplify development and testing, the polyfill is used even on browsers that support shadow DOM. With mixed shadow mode, you gain the speed and efficiency of using native shadow as much as possible in your app. And you can more readily migrate to use native shadow fully in the future.

**How:** Mixed shadow mode is disabled by default. Contact Salesforce Customer Support to enable mixed shadow mode.

Synthetic components can contain native components, but the inverse isn't supported. Here's an example of an app with mixed mode components.

```
<!-- c-app -->
<c-app>
  <c-native>
    #shadow-root
    |   <div>Your content for the native component</div>
  </c-native>
  <c-synthetic>
    <div>Your content for the synthetic component</div>
  </c-synthetic>
</c-app>
```

To enable mixed shadow mode on a component, set the static `shadowSupportMode` property to `any`.

```
// native.js
import { LightningElement } from 'lwc';

export default class NativeComponent extends LightningElement {
  static shadowSupportMode = 'any';
}
```

Valid values for `shadowSupportMode` include:

- `any`—Renders the whole component subtree in native shadow DOM where possible. If the browser doesn't support shadow DOM, the subtree renders in synthetic shadow.
- `reset`—Enables a subclass to opt out of receiving the `shadowSupportMode` value from its superclass. `reset` applies only if the component's superclass is using `any` and no parent components are using `any`.

By default, Lightning Experience and Experience Cloud include the synthetic shadow polyfill. When the polyfill is present, `reset` defaults to synthetic shadow. If the polyfill isn't present, such as in Lightning Out or LWC Open Source, `shadowSupportMode` has no impact and components render in native mode.

Synthetic shadow and native shadow have several differences. For example, apps rely on global style sheets to apply styles throughout synthetic shadow DOM. But in native shadow, a component's styles get added to the component bundle. And synthetic shadow doesn't support some shadow DOM features such as `::part`.

SEE ALSO:

[Synthetic Shadow Aligns Closer to Native Shadow](#)

[Lightning Web Components Developer Guide: Mixed Shadow Mode \(Developer Preview\)](#) (can be outdated or unavailable during release preview)

## Use Salesforce Page Objects with UTAM

Write UI tests for Lightning Experience and the Salesforce mobile app using JavaScript or Java page objects provided by Salesforce. These page objects help you to use UI Test Automation Model (UTAM) to test custom Lightning web components and interact with many of the UI elements built by Salesforce.

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

**How:** Get the artifact for JavaScript page objects using npm. For more information, see the [utam-js-recipes](#) repo.

Get the artifact for Java page objects from Maven Central. For more information, see the [utam-java-recipes](#) repo.

SEE ALSO:

[UTAM Developer Guide](#)

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

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Experience Builder sites, and all versions of the Salesforce app.

**When:** This update has been postponed indefinitely.

**Why:** To improve security, this update serves all static resources from the visualforce domain instead of the lightning domain. This change prevents a script included in a static resource from accessing the document in the lightning domain due to the same-origin security policy.

SEE ALSO:

[Lightning Aura Components Developer Guide: \\$Resource](#)

[Lightning Web Components Developer Guide: Access Static Resources](#)

[Release Updates](#)

## Einstein Vision

Use the power of artificial intelligence (AI) to add personalization to documents. Extract structured data from custom forms and invoices with Einstein OCR (beta).

IN THIS SECTION:

[Extract Structured Data from Custom Forms with Einstein OCR \(Beta\)](#)

Quickly extract data from custom forms, such as insurance, mortgages, and healthcare forms, into Salesforce records. The OCR model analyzes the document layout and content and extracts the corresponding values from the user-defined fields in your custom form.

[Use Einstein OCR to Extract Structured Data from Invoices \(Beta\)](#)

Quickly extract structured data from invoices into Salesforce records. The OCR model analyzes the document layout and content and extracts the values for a predefined form entity list in your invoice. Supported entities include invoice\_number, invoice\_date, due\_date, purchase\_order, total\_amount, total\_tax\_amount, and amount\_due.

SEE ALSO:


[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision](#)

[Einstein Release Notes](#)

## Extract Structured Data from Custom Forms with Einstein OCR (Beta)

Quickly extract data from custom forms, such as insurance, mortgages, and healthcare forms, into Salesforce records. The OCR model analyzes the document layout and content and extracts the corresponding values from the user-defined fields in your custom form.

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

 **Note:** This 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 extract structured data from a custom form, 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. Download the [form template](#) and run these commands.

Extract data from a local image:

```
curl -X POST -H "Authorization: Bearer <TOKEN>"https://api.einstein.ai/v2/vision/ocr -F
modelId="tabulatev2" -F task="form" -F formTemplateContent="@/path/to/82092117.json" -F
sampleContent="@/path/to/82092117.png"
```

Extract data from an image URL:

```
curl -X POST -H "Authorization: Bearer <TOKEN>"https://api.einstein.ai/v2/vision/ocr -F
modelId="tabulatev2" -F task="form" -F formTemplateContent="@/path/to/82092117.json" -F
sampleLocation="https://storage.googleapis.com/sfr-ocr-apis-research/samples/82092117.png"
```

## Use Einstein OCR to Extract Structured Data from Invoices (Beta)

Quickly extract structured data from invoices into Salesforce records. The OCR model analyzes the document layout and content and extracts the values for a predefined form entity list in your invoice. Supported entities include `invoice_number`, `invoice_date`, `due_date`, `purchase_order`, `total_amount`, `total_tax_amount`, and `amount_due`.

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

 **Note:** This 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 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.

Extract data from a local image:

```
curl -X POST -H "Authorization: Bearer <TOKEN>" https://api.einstein.ai/v2/vision/ocr -F
task="text" -F modelId="tabulateV2" -F task="invoice" -F
sampleContent="@/path/to/invoice_sample.png"
```

Extract data from an image URL:

```
curl -X POST -H "Authorization: Bearer <TOKEN>" https://api.einstein.ai/v2/vision/ocr -F
task="text" -F modelId="tabulateV2" -F task="invoice" -F
sampleLocation="https://storage.googleapis.com/sfr-ocr-apis-research/invoice_sample.png"
```

## Visualforce

Increase the security of your Visualforce pages by reviewing and enabling these release updates.

For more information on features affected by these enhancements, refer to the [Visualforce Developer's Guide](#).

## IN THIS SECTION:

[Apply Your Content Security Policy \(CSP\) to Visualforce Pages](#)

To protect your users and your network, allow your custom Visualforce pages to make requests only to the external websites that you trust. Experience Cloud sites and Lightning Experience pages already use your CSP Trusted Sites list for this purpose. Now you can use the same list to manage the sites that you trust for your custom Visualforce pages.

[Protect Your Visualforce Pages with Cross-Origin Opener Policy \(COOP\)](#)

Help shield your custom Visualforce pages from external attacks. When you enable COOP, each top-level custom Visualforce page opens in a new browsing context group. This process prevents direct access between other browser tabs and your Visualforce page and the page's content. For example, a process that opens your page in a pop-up window can't access the page's content for potential cross-origin attacks.

[Restrict Page Resource Requests with Cross-Origin Embedder Policy \(COEP\)](#)

To safeguard your custom Visualforce pages, only allow content from external sources that trust your page. When you enable COEP, externally sourced embedded content loads only when the origin states that your page or domain can load its content. Embedded content can include images, documents, and widgets.

[Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing \(Release Update\)](#)

To improve security, this update validates the Apex get or set method access modifier and throws an error if the Visualforce Expression Language can't invoke the method. When accessing Apex getter or setter methods defined by custom controllers, the Visualforce Expression Language incorrectly validates the access modifiers of the methods. Developers can sometimes access unauthorized get or set methods on Apex classes. This update was first available in Summer '22 and is enforced in Winter '23.

[Prevent Consecutive API Navigation Calls \(Release Update\)](#)

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.

[Enable Visualforce JavaScript Remoting Enforcement \(Release Update\)](#)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update was first available in Summer '22 and is enforced in Winter '23.

## Apply Your Content Security Policy (CSP) to Visualforce Pages

To protect your users and your network, allow your custom Visualforce pages to make requests only to the external websites that you trust. Experience Cloud sites and Lightning Experience pages already use your CSP Trusted Sites list for this purpose. Now you can use the same list to manage the sites that you trust for your custom Visualforce pages.

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

**How:** To allow access to a trusted site from secured Visualforce pages, add the site on the CSP Trusted Sites Setup page with a context of All or Visualforce pages. To secure a Visualforce page via your updated CSP settings, set the page's `cspHeader` attribute to `true`.

## SEE ALSO:

[Salesforce Help: Manage CSP Trusted Sites \(can be outdated or unavailable during release preview\)](#)

[Visualforce Developer Guide: apex:page \(can be outdated or unavailable during release preview\)](#)

## Protect Your Visualforce Pages with Cross-Origin Opener Policy (COOP)

Help shield your custom Visualforce pages from external attacks. When you enable COOP, each top-level custom Visualforce page opens in a new browsing context group. This process prevents direct access between other browser tabs and your Visualforce page and the page's content. For example, a process that opens your page in a pop-up window can't access the page's content for potential cross-origin attacks.

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

**How:** Browser access checks use the headers for your Visualforce site and external sites that you access from your page. To preserve your users' access to the required content, we recommend that you review the expected behavior and test COOP in a sandbox before you enable this feature in production.

SEE ALSO:

[Salesforce Help: Protect Your Visualforce Pages with Cross-Origin Opener Policy \(COOP\) \(can be outdated or unavailable during release preview\)](#)

## Restrict Page Resource Requests with Cross-Origin Embedder Policy (COEP)

To safeguard your custom Visualforce pages, only allow content from external sources that trust your page. When you enable COEP, externally sourced embedded content loads only when the origin states that your page or domain can load its content. Embedded content can include images, documents, and widgets.

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

SEE ALSO:

[Salesforce Help: Restrict Page Resource Requests with Cross-Origin Embedder Policy \(COEP\) \(can be outdated or unavailable during release preview\)](#)

## Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing (Release Update)

To improve security, this update validates the Apex get or set method access modifier and throws an error if the Visualforce Expression Language can't invoke the method. When accessing Apex getter or setter methods defined by custom controllers, the Visualforce Expression Language incorrectly validates the access modifiers of the methods. Developers can sometimes access unauthorized get or set methods on Apex classes. This update was first available in Summer '22 and is enforced in Winter '23.

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

**When:** This update was first available in Summer '22 and is enforced 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:** To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing, follow the testing and activation steps.

Follow the access modifier requirements in the [Apex Developer Guide](#) so that Visualforce can parse your expression. For example, to make an Apex class and a get or set 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, getter or setter isn't visible.

## Prevent Consecutive API Navigation Calls (Release Update)

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.

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

**When:** This update has been postponed indefinitely.

## Enable Visualforce JavaScript Remoting Enforcement (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update was first available in Summer '22 and is enforced in Winter '23.

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

**When:** This update was first available in Summer '22 and is enforced in Winter '23. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** To improve security of the Visualforce JavaScript Remoting API, this update modifies how the CSRF token is created for the Visualforce `$RemoteAction` global variable. This validation adds more protection to API remoting calls by guest users. Also, this update validates the `{"apexType": "Object"}` parameter used by the Visualforce `$RemoteAction` global variable against the Apex method parameter and throws an error if the `apexType` parameter is invalid. This validation prevents users from providing Apex objects that they can't access or providing Apex objects that don't satisfy the Apex method parameter.

**How:** We recommend performing these testing steps in a sandbox environment to evaluate the impact and fix any validation errors before it's auto-enabled in Winter '23.

1. From Setup, in the Quick Find box, enter *Release Updates*, then select **Release Updates**. Select **Enable Visualforce JavaScript Remoting Enforcement**, but don't activate the release update yet.
2. Search your application code to find all Visualforce JavaScript Remoting API calls. An API call consists of Apex controller methods and Visualforce JavaScript to invoke the methods.

The Remoting API invokes Apex controller methods with an `@RemoteAction` annotation. The Apex controller methods use this signature to deserialize an Apex object type:

```
@RemoteAction
global static String myMethod(String inputArgument) { ... }
```

The Visualforce pages use this JavaScript to invoke Apex controller methods and serialize Apex object types:

```
Visualforce.remoting.Manager.invokeAction(
    ' {!$RemoteAction.MyController.myMethod}',
    myArgument,
    function(result, event){...}
    ...
```

3. Enable the release update test run to see if any of your Visualforce Javascript Remoting API calls fail validation. Manually test each path that uses Visualforce JavaScript Remoting. The console log throws an exception or an error message when it encounters an invalid Apex controller or CSRF token. To learn how to troubleshoot invalid calls to the API, review [our list of Visualforce Remoting API errors](#).
4. Review each validation failure, and take steps to correct the Visualforce JavaScript Remoting API usage in your code. When you've finished testing all your Visualforce JavaScript Remoting API calls, disable the release update test run and transfer the code changes to production. In production, enable the release update or wait for it to be automatically enabled in Winter '23.

To resolve more complex validation errors, consider revising your application code. For example, if your application code references an `apexType` parameter for an Apex object that's reserved for internal use, rewrite the code to provide a valid `apexType` parameter.





**Note:** Making calls to the Visualforce JavaScript Remoting API can cause unexpected changes in your page's behavior. If you have to periodically refresh your page so that your CSRF token doesn't expire, add the Apex controller to a profile to grant access through the profile instead of the token.

#### SEE ALSO:

[Visualforce Developer Guide: Common Visualforce JavaScript Remoting API Validation Errors Release Updates](#)

## Apex

The user mode database operations feature is now in beta. Use the new `scope` attribute in the `@AuraEnabled` annotation to enable global caching of Apex controller methods. You can't overload `@AuraEnabled` methods. Call invocable actions from Apex code using the `Invocable.Action` class methods.

For more information on these enhancements, refer to the [Apex Developer Guide](#) and the [Apex Reference Guide](#).

#### IN THIS SECTION:

##### [Secure Apex Code with User Mode Database Operations \(Beta\)](#)

Declare if Apex runs database operations in user mode or system mode. The new Database methods support an `AccessLevel` parameter that lets you run database operations in user mode instead of in the default system mode.

##### [Choose Global Cache Scope for Apex Controller Methods](#)

The `@AuraEnabled` annotation is enhanced with a `scope` attribute. Setting the scope to `global` enables Apex methods to be cached in a global cache such as the Salesforce CDN.

##### [Overloads Aren't Allowed on @AuraEnabled Methods](#)

You can't overload `@AuraEnabled` annotated methods. An error message is displayed during compilation to warn you of overloads.

##### [Call Invocable Actions from Apex \(Developer Preview\)](#)

`Invocable.Action` is a new Apex class that allows you to call invocable actions from Apex code. For the developer preview, this feature is available only in scratch orgs.

##### [Call External Services Registrations from Apex](#)

External Services connect your Salesforce org to a service outside of Salesforce, such as an employee banking service. After you register the external service, you can call it natively in your Apex code.

##### [Get Fairer Resources When Running Apex Tests](#)

Your Apex tests are likely to run faster now because testing resources are better distributed. This improvement helps ensure that you get fair and optimal resource allocation. Previously, certain testing patterns tended to over-consume available resources through a substantial number of concurrent tests. Unfair resource allocation sometimes resulted, which required test execution throttling to ensure optimized and equally distributed resource use across the instance.

#### SEE ALSO:

[Apex: New and Changed Items](#)

## Secure Apex Code with User Mode Database Operations (Beta)

Declare if Apex runs database operations in user mode or system mode. The new Database methods support an `AccessLevel` parameter that lets you run database operations in user mode instead of in the default system mode.

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



**Note:** 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 doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. 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. You can provide feedback and suggestions for the feature in the [Trailblazer Community](#).

**Why:** Apex code runs in system mode by default, which means that it runs with substantially elevated permissions over the user running the code. To enhance the security context of Apex, you can specify user mode access for database operations. Field-level security (FLS) and object permissions of the running user are respected in user mode, unlike in system mode. User mode always applies sharing rules; in system mode they're controlled by the [class sharing keywords](#).

**How:** You can indicate the mode of the operation by using `WITH USER_MODE` or `WITH SYSTEM_MODE` in your SOQL query. This example specifies user mode.

```
List<Account> acc = [SELECT Id FROM Account WITH USER_MODE];
```

Database operations can specify user or system mode. This example inserts a new account in user mode.

```
Account acc = new Account (Name='test');  
insert as user acc;
```

The new `AccessLevel` class represents the two modes in which Apex runs database operations. Use this new class to define the execution mode as user mode or system mode. Use these new overloaded methods to perform DML and query operations.

- `Database.query` methods
- `Search.query` methods
- Database DML methods (`insert`, `update`, `upsert`, `merge`, `delete`, `undelete`, and `convertLead`)

SEE ALSO:

[System Namespace](#)

## Choose Global Cache Scope for Apex Controller Methods

The `@AuraEnabled` annotation is enhanced with a `scope` attribute. Setting the scope to `global` enables Apex methods to be cached in a global cache such as the Salesforce CDN.

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

SEE ALSO:

[Cache Apex Calls for Guest Users Only \(Beta\)](#)

## Overloads Aren't Allowed on @AuraEnabled Methods

You can't overload `@AuraEnabled` annotated methods. An error message is displayed during compilation to warn you of overloads.

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

## Call Invocable Actions from Apex (Developer Preview)

Invocable.Action is a new Apex class that allows you to call invocable actions from Apex code. For the developer preview, this feature is available only in scratch orgs.

**Where:** This change applies to Lightning Experience and Salesforce Classic scratch orgs.



**Note:** Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

**How:** To enable this feature in your scratch org, add a reference to `CallIAFromApex` in the `project-scratch-def.json` file in your SFDX project.

```
{
  "orgName": "my company", "edition": "Developer",
  "features": [ "CallIAFromApex" ],
  "settings": {
    ...
  }
}
```

After you modify the file, reference `Invocable.Action` in your Apex code. This example uses the standard invocable action “`chatterPost`” to post a message to the current user's feed.

```
Invocable.Action action = Invocable.Action.createStandardAction('chatterPost');
action.setInvocationParameter('text', 'This is a test.');
```

```
action.setInvocationParameter('type', 'User');
action.setInvocationParameter('subjectNameOrId', UserInfo.getUserId());
List<Invocable.Action.Result> results = action.invoke();
if (results.size() > 0 && results[0].isSuccess()) {
    System.debug('Created feed item with ID: ' +
results[0].getOutputParameters().get('feedItemId'));
}
```

This example calls a custom invocable action named `Doubler` that returns a number that's twice the input value.

```
Invocable.Action action = Invocable.Action.createCustomAction('apex', 'Doubler');
action.setInvocationParameter('input', 1);
List<Invocable.Action.Result> results = action.invoke();

if (results.size() > 0 && results[0].isSuccess()) {
    System.debug('Result is: ' + results[0].getOutputParameters().get('output'));
}
```

## Call External Services Registrations from Apex

External Services connect your Salesforce org to a service outside of Salesforce, such as an employee banking service. After you register the external service, you can call it natively in your Apex code.

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

**How:** Objects and operations defined in the external service's registered API specification become Apex classes and methods in the `ExternalService` namespace. The registered service's schema types map to Apex types, and are strongly typed, making the Apex

compiler do the heavy lifting for you. For example, you can make a type-safe callout to an external service from Apex, eliminating the need to use the `Http` class or perform transforms on JSON strings.

SEE ALSO:

[Salesforce Help: Invoke External Service Callouts Using Apex \(can be outdated or unavailable during release preview\)](#)

## Get Fairer Resources When Running Apex Tests

Your Apex tests are likely to run faster now because testing resources are better distributed. This improvement helps ensure that you get fair and optimal resource allocation. Previously, certain testing patterns tended to over-consume available resources through a substantial number of concurrent tests. Unfair resource allocation sometimes resulted, which required test execution throttling to ensure optimized and equally distributed resource use across the instance.

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

SEE ALSO:

[Apex Developer Guide: Testing Best Practices](#)

## API

Improvements have been made to the API, a GraphQL API is available (Beta), and legacy versions have been retired or deprecated.

IN THIS SECTION:

### [An Error Code Has Been Added to the Platform](#)

The `410 : GONE` error code is now available for use by the Salesforce Platform. This error is returned if you use a Platform API, such as REST API, with an operation or resource that has been retired or removed.

### [Get Notifications When You Retrieve the Maximum Deployable Number of Custom Fields with Metadata API](#)

To improve the developer experience, now you receive an API notification each time you retrieve 90% or more of the maximum number of custom fields that you can deploy at once with Metadata API. The maximum custom fields for one deployment is 45,000. The custom fields retrieved in one package.xml file are: 1) the sum of the fields on each object in the CustomObjects section of package.xml and 2) the sum of the custom fields in the CustomFields section of package.xml. You can still retrieve above the deployable maximum up to [the limit on total size of retrieved files](#). But you must use more than one deployment to deploy all of the custom fields. Previously, there wasn't a clear way to tell when you retrieved close to or above the maximum custom fields allowed in one deployment.

### [Ensure that Each Metadata Component in a Deployment Has a Unique Name](#)

To prevent deployment failure, make sure that each component in a Metadata API deployment has a unique name. The deployment process doesn't allow duplicate metadata component names or names that resolve to be duplicates, such as a symbol and the UTF-8 encoded symbol. Previously, it appeared that the API allowed functionally duplicate component names, but the process overwrote the first component saved in the database with the second component saved. An improvement to the way that deployed metadata components are saved in the database now prevents overwriting and so the deployment fails.

### [Query with GraphQL API \(Beta\)](#)

Aggregate records, request explicit fields, introspect the schema, and more with the GraphQL API for Salesforce. GraphQL is an open-source data query and mutation platform for APIs. Use the GraphQL API instead of REST APIs to send and receive data more efficiently and make your app perform better. Your app can query for all the data that you want in a single request, and the response contains only the data you need.

### [Retrieve Accessible PDFs with the Analytics Download API](#)

Download your Analytics assets as images or PDFs with ease. Use the Analytics Download API to download CRM Analytics dashboards and lenses and Lightning reports. The Analytics Download API can be used in workflows, custom Analytics implementations, and even in CRM Analytics link widgets.

### [Legacy API Versions 7.0 Through 20.0 Are Now Retired \(Release Update\)](#)

Versions 7.0 through 20.0 of the Salesforce Platform API are now retired and unavailable. Requests to these versions now fail with an error message indicating that the requested endpoint has been deactivated. The Release Card was first available in Spring '21 and this change was first announced in November 2019.

### [Legacy API Versions 21.0 Through 30.0 Are Being Retired \(Release Update\)](#)

Versions 21.0 through 30.0 of the Salesforce Platform API are being retired in Summer '23. They are now deprecated and are no longer supported by Salesforce. The Release Card was first available in Summer '21 and this change was first announced in October 2020.

## An Error Code Has Been Added to the Platform

The `410 : GONE` error code is now available for use by the Salesforce Platform. This error is returned if you use a Platform API, such as REST API, with an operation or resource that has been retired or removed.

SEE ALSO:

[REST API Developer Guide: Status Codes and Error Responses](#)

[SOAP API Developer Guide: Core Data Types Used in API Calls](#)

## Get Notifications When You Retrieve the Maximum Deployable Number of Custom Fields with Metadata API

To improve the developer experience, now you receive an API notification each time you retrieve 90% or more of the maximum number of custom fields that you can deploy at once with Metadata API. The maximum custom fields for one deployment is 45,000. The custom fields retrieved in one package.xml file are: 1) the sum of the fields on each object in the CustomObjects section of package.xml and 2) the sum of the custom fields in the CustomFields section of package.xml. You can still retrieve above the deployable maximum up to [the limit on total size of retrieved files](#). But you must use more than one deployment to deploy all of the custom fields. Previously, there wasn't a clear way to tell when you retrieved close to or above the maximum custom fields allowed in one deployment.

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To prevent deployment failure, make sure that each component in a Metadata API deployment has a unique name. The deployment process doesn't allow duplicate metadata component names or names that resolve to be duplicates, such as a symbol and the UTF-8 encoded symbol. Previously, it appeared that the API allowed functionally duplicate component names, but the process overwrote the first component saved in the database with the second component saved. An improvement to the way that deployed metadata components are saved in the database now prevents overwriting and so the deployment fails.

## Query with GraphQL API (Beta)

Aggregate records, request explicit fields, introspect the schema, and more with the GraphQL API for Salesforce. GraphQL is an open-source data query and mutation platform for APIs. Use the GraphQL API instead of REST APIs to send and receive data more efficiently and make your app perform better. Your app can query for all the data that you want in a single request, and the response contains only the data you need.

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



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

**How:** Use GraphQL's introspection system to explore the schema to see which APIs can be called and the types they return. To request a resource to be added to the schema or give feedback on the GraphQL API, comment on the [GraphQL IdeaExchange post](#).

SEE ALSO:

[Salesforce Developer's Blog: Introducing the Salesforce GraphQL API](#)

[GraphQL API \(Beta\) Developer Guide: What is the GraphQL API \(Beta\)? \(can be outdated or unavailable during release preview\)](#)

[GraphQL web site: Introspection](#)

## Retrieve Accessible PDFs with the Analytics Download API

Download your Analytics assets as images or PDFs with ease. Use the Analytics Download API to download CRM Analytics dashboards and lenses and Lightning reports. The Analytics Download API can be used in workflows, custom Analytics implementations, and even in CRM Analytics link widgets.

**Where:** The CRM Analytics for Slack app works with CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. Available for use where approved by a workspace admin and installed in Slack.

**Who:** Users must have the following permissions: Connect Salesforce with Slack, Subscribe to CRM Analytics Assets, Add Recipients to CRM Analytics Notifications, Subscribe to Dashboards, Subscribe to Dashboards: Add Recipients, Subscribe to Reports, and Subscribe to Reports: Add Recipients.

**How:** To use the Analytics Download API, your org must have CRM Analytics for Slack enabled. For more information, see [Enable Salesforce for Slack Integrations](#).

Use the GET request on the Analytics Download resource to download an Analytics asset as a PDF or an image.

```
/services/data/v55.0/analytics/download/<assetType>/Id.<png|pdf>
```

The response is binary data of the PDF or image of the Analytics dashboard or lens. For a Lightning report, the response is an Excel or CSV attachment.

For more information, see the [Analytics Download](#) resource in the *Salesforce Reports and Dashboards REST API Developer Guide*.

## Legacy API Versions 7.0 Through 20.0 Are Now Retired (Release Update)

Versions 7.0 through 20.0 of the Salesforce Platform API are now retired and unavailable. Requests to these versions now fail with an error message indicating that the requested endpoint has been deactivated. The Release Card was first available in Spring '21 and this change was first announced in November 2019.

**Where:** This change affects these API versions.

### Bulk API


16.0, 17.0, 18.0, 19.0, 20.0

### SOAP API

7.0, 8.0, 9.0, 10.0, 11.0, 11.1, 12.0, 13.0, 14.0, 15.0, 16.0, 17.0, 18.0, 19.0, 20.0

### REST API

20.0

 **Note:** This change affects *all* REST APIs that use URLs 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.

**How:** Customers and partners must modify or upgrade their applications to function with more current API versions.

If you request any resource or use an operation from a removed API version

- REST API returns `410 : GONE`.
- SOAP API returns `500 : UNSUPPORTED_API_VERSION`.
- Bulk API returns `400 : InvalidVersion`.

For more information, see [Salesforce Platform API Versions 7.0 through 20.0 Retirement](#).

## Legacy API Versions 21.0 Through 30.0 Are Being Retired (Release Update)

Versions 21.0 through 30.0 of the Salesforce Platform API are being retired in Summer '23. They are now deprecated and are no longer supported by Salesforce. The Release Card was first available in Summer '21 and this change was first announced in October 2020.

**Where:** This change affects these API versions:

### Bulk API


21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

### SOAP API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

### REST API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

 **Note:** This change affects all REST APIs that use URLs beneath `/services/data/vXX.X/`, including:

- Bulk API
- Connect REST API
- IoT REST API
- Lightning Platform REST API
- Metadata API
- Place Order REST API
- Reports and Dashboards REST API
- Tableau CRM REST API
- Tooling API

This change applies to Salesforce Classic and Lightning Experience in Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled org editions.

**When:** You can continue to use these legacy API versions until Summer '23 is released. At that time, these legacy versions will be retired and unavailable. When these legacy versions are retired, applications consuming these versions of the APIs will experience disruption. The requests will fail with an error message indicating that the requested endpoint has been deactivated.

### How:

- Customers and partners should modify or upgrade their applications to function with more current API versions available to prevent disruption. Moving to newer versions of our APIs offers advanced capabilities with improved security and performance.

- Before the Summer '23 release, customers and partners must modify or upgrade their applications to function with more current API versions.

Use the API Total Usage event to identify requests made from old or unsupported API versions of Platform SOAP API, REST API, and Bulk API.

For more information, see [Salesforce Platform API Versions 21.0 through 30.0 Retirement](#).

## Packaging

Determine which Apex classes have insufficient code coverage. Create licenses for specific features and user categories with the Partner Licensing Platform.

### IN THIS SECTION:

#### [Determine Which Apex Classes Have Insufficient Code Coverage](#)

To help you determine how to improve code coverage for your packages, we've extended the output of the Salesforce CLI package version report command. When you run `sfdx force:package:version:report --verbose`, we display a list of Apex classes that aren't passing code coverage requirements, from lowest to highest code coverage percentage.

#### [Create Licenses for Specific Features and User Categories with the Partner Licensing Platform \(Developer Preview\)](#)

The Partner Licensing Platform transforms how you price, license, and distribute your applications. Use custom permission set licenses to increase and diversify revenue by selling multiple tiers, versions, or supplements for your products. Create licenses that can be assigned to specific user types only. And recover revenue for products that previously were restricted only contractually.

## Determine Which Apex Classes Have Insufficient Code Coverage

To help you determine how to improve code coverage for your packages, we've extended the output of the Salesforce CLI package version report command. When you run `sfdx force:package:version:report --verbose`, we display a list of Apex classes that aren't passing code coverage requirements, from lowest to highest code coverage percentage.

**Where:** This change applies to unlocked and second-generation managed packages created using Salesforce CLI.

**Why:** If your package version isn't passing code coverage, run this command to uncover which Apex classes need more code coverage.


**How:** To display a report directly in Salesforce CLI, run `sfdx force:package:version:report --verbose`. To create a report in JSON, run `sfdx force:package:version:report --verbose --json`.

Code coverage details for Apex classes are also available in the Tooling API. Use the `CodeCoveragePercentage` field in the `Package2Version` object.

## Create Licenses for Specific Features and User Categories with the Partner Licensing Platform (Developer Preview)

The Partner Licensing Platform transforms how you price, license, and distribute your applications. Use custom permission set licenses to increase and diversify revenue by selling multiple tiers, versions, or supplements for your products. Create licenses that can be assigned to specific user types only. And recover revenue for products that previously were restricted only contractually.

**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.



**Why:** By default, custom permission set licenses are foundation licenses that entitle assigned users access to the package namespace, foundation features, and any included licensed features. Now you can create supplement custom licenses so that you can sell additional licensed functionality on top of your foundation custom licenses.

You can specify the types of users that can be assigned your licenses. For example, you can create a license for internal Salesforce users and a separate license for external Experience Cloud users for a lower price where both licenses are technically restricted. And you can indicate whether access to the package is blocked for assigned users when all custom permission set licenses expire.

**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 ISVforce Guide.

SEE ALSO:

[ISVforce Guide: Partner Licensing Platform \(Developer Preview\) \(can be outdated or unavailable during release preview\)](#)

## Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

IN THIS SECTION:

[Create Scratch Orgs More Easily with Org Shape \(Generally Available\)](#)

Features, settings, edition, limits, and licenses determine what we refer to as an org's shape. We know it's not easy to build a scratch org definition that mirrors the features and settings in your production org. With Org Shape for Scratch Orgs, you can leave building the scratch org definition to us. After you capture the org's shape, you can spin up scratch orgs based on it.

[Updates to Developer Edition Org Expiration Policy](#)

Due to capacity planning best practices, we've changed our Developer Edition (DE) org expiration policy. DE orgs that haven't been logged into for 180 days (reduced from 365 days) are marked as inactive and queued for deletion.

SEE ALSO:

[Sign up for a Developer Edition Org](#)

[Salesforce Help: Sandboxes](#)

[Salesforce DX Developer Guide: Scratch Orgs](#)

## Create Scratch Orgs More Easily with Org Shape (Generally Available)

Features, settings, edition, limits, and licenses determine what we refer to as an org's shape. We know it's not easy to build a scratch org definition that mirrors the features and settings in your production org. With Org Shape for Scratch Orgs, you can leave building the scratch org definition to us. After you capture the org's shape, you can spin up scratch orgs based on it.

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

**When:** This feature is generally available on June 11, 2022.

**How:** Enable Org Shape for Scratch Orgs in both the source org and the Dev Hub org. If you don't have access to the Org Shape Setup page in these orgs, ask your Salesforce admin for help.

SEE ALSO:

[Salesforce DX Developer Guide: Create a Scratch Org Based on an Org Shape](#)

## Updates to Developer Edition Org Expiration Policy

Due to capacity planning best practices, we've changed our Developer Edition (DE) org expiration policy. DE orgs that haven't been logged into for 180 days (reduced from 365 days) are marked as inactive and queued for deletion.

**Where:** This change applies to Developer Edition orgs.

**When:** This change will occur on or after July 10, 2022.

**How:** You'll receive an email that provides details about your impending expiration date. To continue using your DE org, simply log in before the date indicated in the email. If you don't wish to continue using your inactive DE org, no action is required.

SEE ALSO:

[Salesforce Help: Developer Org Expiration](#)

## Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy.

IN THIS SECTION:

[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.

[Develop from Anywhere Using Salesforce Code Builder \(Beta\)](#)

Code Builder (Beta) is a modern, web-based development environment that makes it easy for Salesforce developers to develop from anywhere without downloading software.


## 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.


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

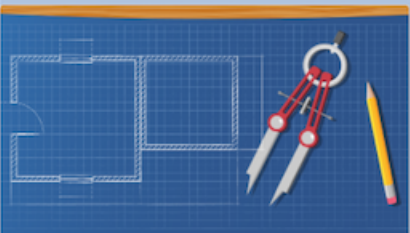
We recommend that you integrate performance testing into your release cycle. Performance Assistant guides you through the three phases of performance testing: Learn, Prepare, and Analyze and Optimize.


**SETUP**  
**Performance Assistant**

## The Path to Building Performant Solutions in Salesforce

Welcome to Performance Assistant, your guide through the journey of performance testing for scalability. Follow the step-by-step guidance in each section, starting with Learn.






**Learn**

Learn the basics of scalability and understand the performance testing process from end to end.

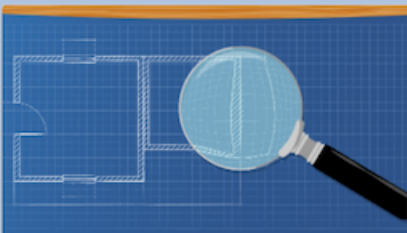
[Go to Steps](#)



**Prepare**

Create your performance testing strategy, develop a test plan, and schedule your test.

[Go to Steps](#)




**Analyze and Optimize**

Interpret your test results, identify performance hotspots, and optimize your solution.

[Go to Steps](#)

In each phase, Performance Assistant provides guidance and resources to help you test your system with confidence. You can visit Performance Assistant at any time during testing.


**SETUP**  
**Performance Assistant**

**Analyze and Optimize**

Review your test results and develop an action plan for your regular release cycle.

[← Execute](#)

- 1 **Interpret Your Results**  
After you run your performance test, you can view the results in the Performance Assistant.
- 2 **Optimize Your Solution**  
Use your analysis to identify and address performance issues in your solutions.
- 3 **Integrate Performance Testing**  
Now that you completed your test, you can integrate performance testing into your development lifecycle.

**Prepare**

A well-crafted plan helps you get the most out of your test with Salesforce.

[← Learn](#)

- 1 **Run Baseline Tests**  
Define the business scenarios to test.
- 2 **Generate Your Test Plan**  
Complete the following table to generate your test plan.

Business Scenarios	Request Rate
Scenario 1	10
Checkout Flow	20
Vaccine Scheduler	30
Scenario 2	40
Scenario 3	50
Scenario 4	60
Scenario 5	70

**Learn**

To ensure your Salesforce implementation can grow with your future needs, develop solutions with scale and performance in mind. Learn about scalability and performance testing, and how they impact your Salesforce org. Then learn some best practices to incorporate into your development lifecycle.

[← Home](#)

- 1 **Learn About Scalability and Performance**  
How does scalability impact your application performance, user experience, and productivity?
- 2 **Learn About Performance Testing at Salesforce**  
Understand the mechanics of performance testing.
- 3 **The Performance Testing Process**  
Walk through the stages of performance testing and understand what tooling is needed.

[Prepare →](#)

Sound familiar? This application became generally available in Spring '22, but it needed to be enabled manually. Performance Assistant now appears in your Setup menu automatically. It's ready for the spotlight.

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](#)

## Develop from Anywhere Using Salesforce Code Builder (Beta)

Code Builder (Beta) is a modern, web-based development environment that makes it easy for Salesforce developers to develop from anywhere without downloading software.

**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](#).

**When:** After July 13, Salesforce Code Builder becomes available to customers as an open Beta Service in Summer '22.

**Why:** With Code Builder, we give you a modern development environment that includes your favorite languages and frameworks, such as Apex, SOQL, and Lightning Web Components, all from within a browser.

**How:** Download Code Builder (Beta) managed package from AppExchange. Look for further announcements and go to [Code Builder documentation](#) to learn about how you can try Code Builder.

## DevOps Center (Beta)

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps best practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

Are you looking for an alternative to change sets based on modern development best practices? We thought so.

## IN THIS SECTION:

[Manage and Release Changes Easily and Collaboratively with DevOps Center \(Beta\)](#)

Manage your changes and releases using the DevOps Center point-and-click interface, or directly from the source control system, or a combination of both. Under the hood, we manage the source control branches so developers and builders can focus on development tasks.

[What's New in DevOps Center Beta?](#)

You asked, and we listened. We've added these new features and improved capabilities to DevOps Center for beta.

## SEE ALSO:

[Salesforce Help: Install and Configure DevOps Center](#)

[Salesforce Help: Manage and Release Changes Easily and Collaboratively with DevOps Center](#)

## Manage and Release Changes Easily and Collaboratively with DevOps Center (Beta)

Manage your changes and releases using the DevOps Center point-and-click interface, or directly from the source control system, or a combination of both. Under the hood, we manage the source control branches so developers and builders can focus on development tasks.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Developer, 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](#).

**When:** The DevOps Center beta launch begins on June 20, 2022. Join the [DevOps Center Trailblazer group](#) to get the latest information on timing, to find links to documentation and videos, and to ask questions.

**Who:** DevOps Center is available to all customers and can be enabled from the Setup menu. To use DevOps Center, add team members as users in the org in which DevOps Center is installed. Users also require a GitHub account and access to their team's GitHub repository.

**Why:** Unlike change sets, where you manually track your changes, changes are captured in a source control system. Say goodbye to spreadsheets. You have a single source of truth for configuration and code, which improves collaboration across all functions: admins, developers, release managers, QA, and other business stakeholders.

**How:** Enable DevOps Center in the org in which you plan to install DevOps Center, accept the license agreement, and then install the managed package. From Setup, enter *DevOps Center* in the Quick Find box, then select **DevOps Center**.

## What's New in DevOps Center Beta?

You asked, and we listened. We've added these new features and improved capabilities to DevOps Center for beta.

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## New Features in Public Beta


These features were added for the public beta.

### DevOps Center and GitHub Interoperability (Hybrid Team Flows): Part II

We've added additional capabilities to support a broader hybrid team flow. We have more support for team members working together both inside and outside of DevOps Center.

For developers who prefer to perform the majority of their development work entirely outside of DevOps Center, they can merge the pull request in GitHub, commit the changes to the work item feature branch, and create the pull request. Back in DevOps Center, everything is properly reflected.

- Developers can create a work item feature branch inside or outside of DevOps Center.
- Developers can perform their work using the tools of their choice, for example, within an org or using an IDE such as Salesforce Extensions for VS Code.
- Developers can commit their changes, and create and merge pull requests (reviews) either inside or outside of DevOps Center.

 **Important:** If you're working directly in GitHub, there can be a delay between when these actions happen and when they're reflected in DevOps Center. If you take subsequent actions on the related objects in DevOps Center before they are reflected, you may see unexpected or inconsistent behavior.

### Enable and Install DevOps Center through Setup

Enabling DevOps Center is self-service from the DevOps Center Setup page. After you click the toggle to enable DevOps Center and accept the license terms, you can launch the package installer directly from this page.

### Support for the Project `.forceignore` File

DevOps Center honors the `.forceignore` file, if one exists in the project repository. The file exists in the source control repository and tells DevOps Center which files to ignore when deploying and retrieving metadata. DevOps Center indicates that files are ignored and provides the ability to view a list of ignored files.

Files that are contained or match patterns in the project `.forceignore` file aren't listed in the list of changes and, therefore, can't be committed to the source control repository from DevOps Center. Similarly, if the files listed in the `.forceignore` file exist in the repository, the files aren't deployed upon promotion.

See *Salesforce DX Developer Guide*: [How to Exclude Source When Syncing or Converting](#) for more information on the `.forceignore` file.

### Deleted Metadata

DevOps Center supports deleted metadata. If you delete a component in the development environment and pull the change, it appears as the REMOVE change type. When you commit and subsequently promote this change, the component is removed from the target stages, leveraging the Metadata API's destructive changes functionality.

### List View Filtering and Search

The Work Item list view supports filtering and searching. You can filter the view by Assigned To, Status, and Dev Environment. You can search the Subject and Work Item ID fields.

## New Features Added in Closed Beta


We added these features and usability improvements beyond what was previously provided in the pilot.

### DevOps Center and GitHub Interoperability (Hybrid Team Flows): Part I

We supported more interactions both inside and outside of DevOps Center for team members to review and merge changes directly in the source control system.

- A developer *merges* a pull request directly in GitHub. When the pull request is merged, it's effectively "half-promoted" because it has been merged but not yet deployed into the org associated with that repository branch. DevOps Center indicates this state and guides the user to complete the promotion in DevOps Center.
- Mergeability, as determined by GitHub, is honored by DevOps Center.

- You can indicate that a work item is **Ready to Promote** only when the changes are deemed mergeable. Mergeability is determined by GitHub and is based on either merge conflicts or custom [Mergeability Rules in GitHub](#). If GitHub identifies merge conflicts with the changes, then the changes can't be promoted until the conflicts are resolved.
- Similarly, if your repo uses custom mergeability rules that haven't been met for the changes, then the changes can't be promoted until those rules are met.

 **Important:** If you're working directly in GitHub, there can be a delay between when these actions happen and when they're reflected in DevOps Center. If you take subsequent actions on the related objects in DevOps Center before they are reflected, you may see unexpected or inconsistent behavior.

### Development Environment Synchronization

DevOps Center makes it easier to keep your development environments up to date with the latest source of truth. DevOps Center tracks the differences between each development environment and the first integrated stage of the pipeline. This synchronization process ensures that you're developing against the latest integrated source of truth, including changes from other teammates.

Keeping your development environment synchronized is a best practice for avoiding merge errors and code conflicts, and preventing downstream release headaches.

### Manually Add Any Metadata

You can select and add any metadata source files to your commit, not just the ones that DevOps Center determines have changed.

### Never Status for Work Items

You can now change a work item status to Never, which is useful in the following situations:

- You have a work item that you no longer plan to implement.
- You attempted to promote a work item and it failed due to a "bad" metadata file in the work item. You want to remove the "bad" file from the work item.
- You want to basically start over on a work item.

### Activity History

DevOps Center now shows a comprehensive history of all key events, including promotions, commits, synchronizations, work item status changes, and errors (failures). Activity History is available on each Work Item and on the pipeline. This feature allows you to maintain and view a record of events and associated details for auditing, trouble-shooting, and general visibility purposes.

### Work Item List View Sorting

You can now sort the Work Item list view by any of the visible columns.

### Improved Navigation Through Our Application Header

DevOps Center contains a header that provides access to the org's default home page and active user information. You can easily navigate out of the DevOps Center application to the rest of your org, and have visibility into the active logged-in user with the ability to log out.

## Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

### IN THIS SECTION:

#### [Salesforce Functions Updates](#)

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 provides a platform for custom, elastically scalable business logic using the language and tools of your choice.

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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 provides a platform for custom, elastically scalable business logic using the language and tools of your choice.

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 external object usage with AppExchange App Analytics.

IN THIS SECTION:

[Analyze External Object Usage with AppExchange App Analytics](#)

Gain insight into how subscribers use your managed packages. Usage data now includes create, read, update, and delete (CRUD) data about your external objects associated with external data sources with Salesforce Connect. Filter on the `custom_entity_type` field by `ExternalObject` in your package usage summaries and package log files.

## Analyze External Object Usage with AppExchange App Analytics

Gain insight into how subscribers use your managed packages. Usage data now includes create, read, update, and delete (CRUD) data about your external objects associated with external data sources with Salesforce Connect. Filter on the `custom_entity_type` field by `ExternalObject` in your package usage summaries and package log files.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Developer edition. AppExchange App Analytics is available only for managed packages that 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:

[Package Usage Logs](#)

[Package Usage Summaries](#)

[External Data Sources with Salesforce Connect](#)

## Change Data Capture

Use TextArea fields to enrich change events. Filter your change event stream (pilot).



## IN THIS SECTION:

[Filter Your Stream of Change Events \(Pilot\)](#)

Receive only the change events that you're interested in instead of all record changes for an entity. Use a filter in a channel member and specify the fields and values to filter change events on. Only the matched change events are delivered to your CometD client. With fewer events delivered, you make more efficient use of your event delivery allocation.

[Enrich Change Events with TextArea Fields](#)

You can now add TextArea fields as enriched fields in your change events. Previously, only Text fields were supported.

[Receive Change Event Notifications for More Objects](#)

With Change Data Capture, you can now receive notifications of record changes for the AppExtension, BriefcaseAssignment, BriefcaseDefinition, CommerceEntitlementBuyerGroup, CommerceEntitlementPolicy, CommerceEntitlementProduct, Expense, FieldServiceMobileSettings, IndividualApplication, Order, OrderItem, Product2, ServiceReport, ServiceReportLayout, and ServiceTerritoryLocation objects.

## Filter Your Stream of Change Events (Pilot)

Receive only the change events that you're interested in instead of all record changes for an entity. Use a filter in a channel member and specify the fields and values to filter change events on. Only the matched change events are delivered to your CometD client. With fewer events delivered, you make more efficient use of your event delivery allocation.

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



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

**How:** With the Customize Application permission, you can configure stream filtering using Tooling API or Metadata API. To create a channel, use PlatformEventChannel. To add a filter expression for a change event, use PlatformEventChannelMember.

For instance, to receive change events only for accounts whose industry is Agriculture and number of employees is over 1,000, specify this filter expression in the PlatformEventChannelMember.FilterExpression field for AccountChangeEvent.

```
Industry='Agriculture' AND NumberOfEmployees>1000
```

The fields you select in the filter expression are automatically added as enriched fields. As a result, change events always contain the non-empty selected fields, even when they're unchanged, and the events can be filtered. In the example filter expression, the Industry and NumberOfEmployees fields are added to the received changed events in the filtered channel if they have a non-empty value.


**Note:**

- This pilot feature supports CometD subscribers. It doesn't support Apex triggers.
- For the pilot, namespaces and managed packages aren't supported.
- All field types supported for enriched fields are supported in filter expressions.

## Enrich Change Events with TextArea Fields

You can now add TextArea fields as enriched fields in your change events. Previously, only Text fields were supported.

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

 **Note:** This change doesn't apply to TextArea (Long), TextArea (Rich), or TextArea (Encrypted) fields.

SEE ALSO:

[Change Data Capture Developer Guide: Enrich Change Events with Extra Fields When Subscribed with CometD](#)

## Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for the AppExtension, BriefcaseAssignment, BriefcaseDefinition, CommerceEntitlementBuyerGroup, CommerceEntitlementPolicy, CommerceEntitlementProduct, Expense, FieldServiceMobileSettings, IndividualApplication, Order, OrderItem, Product2, ServiceReport, ServiceReportLayout, and ServiceTerritoryLocation objects.

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

**How:** Change Data Capture is available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel.

## Platform Events

Use custom channels to group platform events into one stream. Filter your event stream (beta). Get the result of asynchronous event publishing in Apex (pilot).

IN THIS SECTION:

### [Group Platform Events into One Stream with a Custom Channel](#)

With a custom channel, you can receive a stream of event messages corresponding to one or more platform events defined in Salesforce. For example, if you defined platform events corresponding to orders for different regions, one client can subscribe to all those events and process them. Custom channels are supported in CometD clients only and you can add filters (beta) to them. By using only one client to subscribe to all events and using filters, your subscriptions are optimized.

### [Filter Your Stream of Platform Events with Custom 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, subscribers can make more efficient use of the event delivery allocation. This feature, offered last release in beta, continues to be a publicly available beta.

### [Get the Result of Asynchronous Platform Event Publishing in Apex \(Pilot\)](#)

Get the final result of an event publish operation through an Apex callback that you implement. Previously, you could get the intermediate queueing result only of an event publish operation, not the final result. Event publishing is asynchronous, and the immediate result returned in SaveResult is the result of queuing the publish operation in Salesforce. When resources are available, the system carries out the event publish operation, and the final result is sent in an Apex callback.

## Group Platform Events into One Stream with a Custom Channel

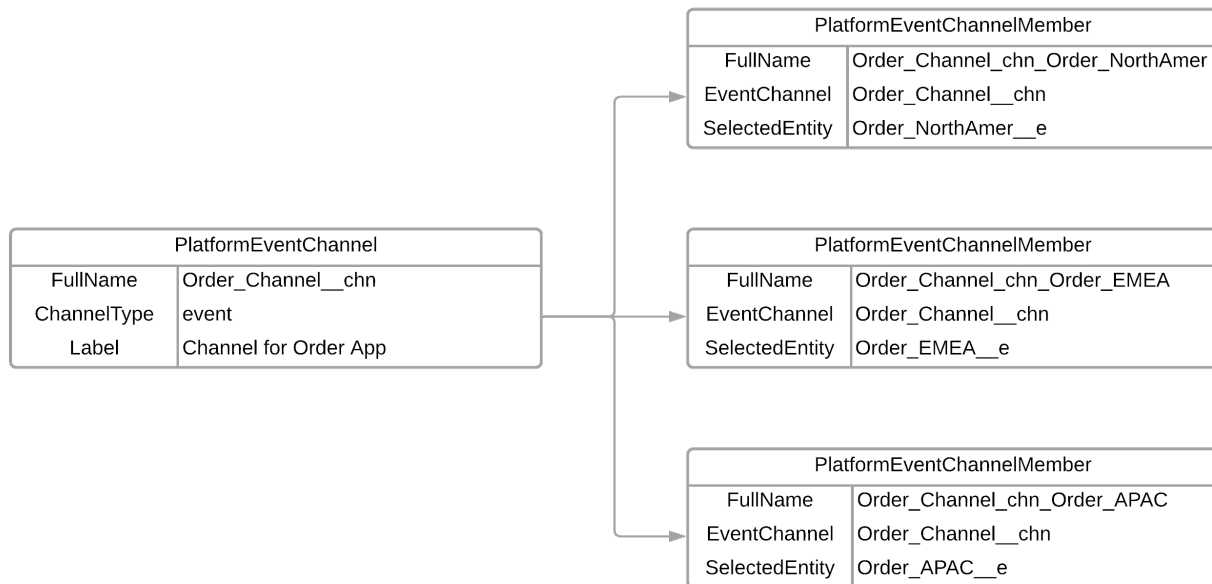
With a custom channel, you can receive a stream of event messages corresponding to one or more platform events defined in Salesforce. For example, if you defined platform events corresponding to orders for different regions, one client can subscribe to all those events and process them. Custom channels are supported in CometD clients only and you can add filters (beta) to them. By using only one client to subscribe to all events and using filters, your subscriptions are optimized.

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

**How:** Create a custom channel, and specify the platform events it contains in Tooling API and Metadata API using PlatformEventChannel and PlatformEventChannelMember.

Custom channels are supported for high-volume custom platform events that you define. They aren't supported for legacy standard-volume custom platform events or standard platform events, such as real-time event monitoring events.

For Performance, Unlimited, and Enterprise editions, you can add up to 50 distinct platform events as part of channel members to a channel. For Developer Edition and Professional Edition with the API add-on, this allocation is 5 distinct platform events. If the same platform event is a member of multiple channels, it's counted once toward the allocation.



As part of this change, we added the `EventApiName` field to event messages to distinguish the messages received on a custom channel. The field contains the type of event and is available in CometD clients that use a Streaming API endpoint with API version 55.0 and later. For example, this event message has an `EventApiName` of `Order_EMEA__e`, which means that it's an `Order_EMEA__e` event.

```
{
  "schema": "e8jMOnID4xDThlaPBMx5gg",
  "payload": {
    "City__c": "London",
    "CreatedById": "005RM000002Qu16YAC",
    "Amount__c": 20,
    "CreatedDate": "2022-03-29T13:45:19.230Z",
    "Order_Number__c": "2"
  },
  "event": {
    "EventApiName": "Order_EMEA__e",
    "EventUuid": "218544ad-0472-4315-970f-8825a2802de6",
    "replayId": 10306
  }
}
```

## Filter Your Stream of Platform Events with Custom 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, subscribers can make more efficient use of the event delivery allocation. This feature, offered last release in beta, continues to be 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](#).

**How:** With the Customize Application permission, you can configure stream filtering using Tooling API or Metadata API. 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:**

- This beta feature is supported for high-volume custom platform events that you define. It isn't supported for legacy standard-volume custom platform events or standard platform events such as real-time event monitoring events.
- This beta feature supports CometD subscribers. It doesn't support other types of subscribers such as Apex triggers, flows, and processes.
- In beta, namespaces and managed packages aren't supported.

## Get the Result of Asynchronous Platform Event Publishing in Apex (Pilot)

Get the final result of an event publish operation through an Apex callback that you implement. Previously, you could get the intermediate queueing result only of an event publish operation, not the final result. Event publishing is asynchronous, and the immediate result returned in `SaveResult` is the result of queuing the publish operation in Salesforce. When resources are available, the system carries out the event publish operation, and the final result is sent in an Apex callback.

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**How:** The publish callback is an Apex class that implements the `EventBus.EventPublishCallback` interface. The interface includes two methods: `onSuccess` and `onFailure`.

```
public class MyPublishCallbackClass implements EventBus.EventPublishCallback {
    public void onSuccess(EventBus.SuccessResult successResult) {
        // Your implementation.
        // ...
    }

    public void onFailure(EventBus.FailureResult failureResult) {
        // Your implementation.
        // ...
    }
}
```

If the asynchronous publish operation is successful, the `onSuccess` method is invoked. If it isn't successful, the `onFailure` method is invoked. Each method takes a parameter that contains the result of the publish operation.

Apex publish callbacks are available for high-volume platform events. Legacy standard-volume events aren't supported.

## Event Bus

Use the Pub/Sub API to publish and subscribe to events. Stream your Salesforce events to Amazon EventBridge (Beta).

### IN THIS SECTION:

#### [Develop Event-Driven Apps with Pub/Sub API \(Generally Available\)](#)

Publish and subscribe to platform events and change data capture events using Pub/Sub API, a secure, highly performant, and scalable API based on gRPC. Use one of the 11 supported programming languages, including Python, Java, Go, and Node. Get peace of mind with final publishing results instead of intermediate queueing results. And with subscription flow control, fine-tune the number of event messages that you receive based on your event processing speed.

#### [Connect Salesforce Events with Amazon EventBridge in AWS \(Beta\)](#)

Use Event Bus Relay to send platform events and change data capture events from Salesforce to 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 events from AWS back to Salesforce, where subscribers can process them using Salesforce Platform capabilities.

## Develop Event-Driven Apps with Pub/Sub API (Generally Available)

Publish and subscribe to platform events and change data capture events using Pub/Sub API, a secure, highly performant, and scalable API based on gRPC. Use one of the 11 supported programming languages, including Python, Java, Go, and Node. Get peace of mind with final publishing results instead of intermediate queueing results. And with subscription flow control, fine-tune the number of event messages that you receive based on your event processing speed.

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

**When:** This feature is available later in the Summer '22 release.

**Why:** Simplify your development by using a single API to manage your events, including publishing, subscribing, and retrieving the event schema. For help with development and troubleshooting, you can call on the gRPC developer community. With Pub/Sub API, you can employ cross-cloud integration capabilities so that your event-driven apps can be integrated across Salesforce clouds.

### SEE ALSO:

[Pub/Sub API Documentation](#)

[gRPC Documentation](#)

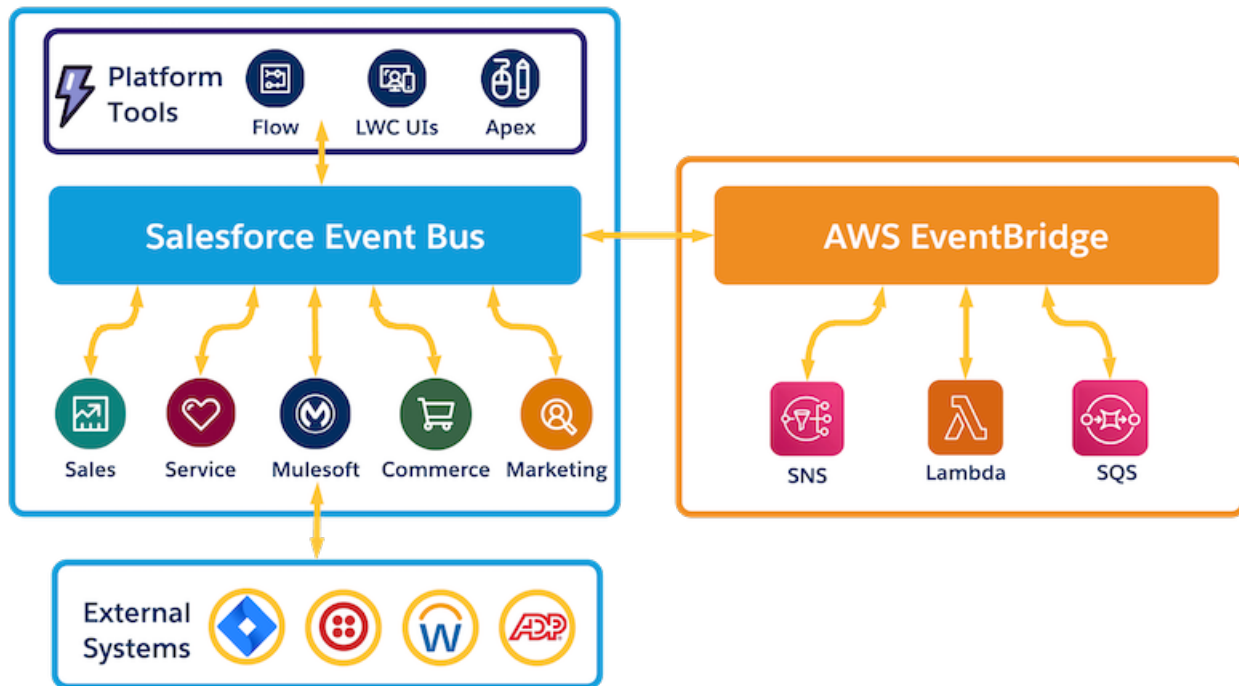
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**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This feature is not available for Hyperforce customers.

**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](#). To join the beta, contact your Salesforce Account or Success team.

**How:** This diagram shows the bidirectional flow of events between Salesforce and Amazon EventBridge.



## 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. Get the Pardot business units the context user has access to, and 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 55.0.

## Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

### IN THIS SECTION:

#### [New and Changed Lightning Web Components](#)

Build UI easily with these new and changed components.

#### [New and Changed Modules for Lightning Web Components](#)

Do more with Lightning web components by using modules.

#### [New and Changed Aura Components](#)

Build UI easily with these new and changed components.

## New and Changed Lightning Web Components

Build UI easily with these new and changed components.

### Changed Lightning Web Components

The following components have changed.

#### **lightning-dual-listbox**

Screen readers now read out moved items and their destination when a user moves items between lists.

#### **lightning-formatted-rich-text**

The HTML tags `b` and `i` are no longer supported. This component now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

Screen readers now read out all HTML element tags that mark text as bold, italic, and other formatted emphasis.

#### **lightning-input-rich-text**

The HTML tags `b` and `i` are no longer supported. This component now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

Screen readers now read out HTML element tags that mark text as bold, italic, and other formatted emphasis in the text editor.

## Accessibility Changes from Spring '22

These components had accessibility improvements in the last release that weren't announced.

Previously these components used `input` elements to create select-only comboboxes. The components now use `button` elements for select-only comboboxes to comply with the [Lightning Design System combobox blueprint](#), which was updated to meet ARIA 1.2 accessibility guidelines.

- `lightning-combobox`
- `lightning-input-address`
- `lightning-input-field`
- `lightning-input-name`

### SEE ALSO:

[Component Library](#)

## New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

### New Modules

These modules are now available.

#### **lightning/alert**

Provides a `LightningAlert.open()` function to create an alert modal that returns a promise on close.

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for details.

#### **lightning/analyticsSmartDataDiscoveryApi (Beta)**

This module includes new wire adapters to work with Einstein Discovery stories.

- `getStories`—Returns a collection of Einstein Discovery stories.

```
import { LightningElement, wire } from 'lwc';
import { getStories } from 'lightning/analyticsSmartDataDiscoveryApi';

export default class GetStories extends LightningElement {
  @wire(getStories)

  onGetStories({ data, error }) {
    if (error) {
      console.log('getStories ERROR:', error);
    } else if (data) {
      console.log('getStories RESPONSE:', data.stories);
    }
  }
}
```

#### **lightning/confirm**

Provides a `LightningConfirm.open()` function to create a confirm modal that returns a promise on close.

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for details.

#### **lightning/prompt**

Provides a `LightningPrompt.open()` function to create a prompt modal that returns a promise on close.

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for more details.

### Changed Modules

These modules have a new wire adapter or JavaScript function.

#### **lightning/analyticsWaveApi**

This module includes new wire adapters and methods for working with dataset versions and templates.

The new wire adapters are:

- `getActions`—Returns a collection of Salesforce actions for an Analytics user.
- `getDataConnectorSourceObjectDataPreviewWithFields`—Returns the fields of a source object for preview.
- `getDatasetVersion`—Returns a specific version of an Analytics dataset.
- `getDatasetVersions`—Returns a collection of all of the versions for an Analytics dataset.
- `getDependencies`—Returns the dependencies for an Analytics asset.



- `getSecurityCoverageDatasetVersion`—Returns the security coverage for a specific Analytics dataset.
- `getWaveTemplate`—Returns an Analytics template.
- `getWaveTemplateConfig`—Returns the configuration for an Analytics template.
- `getWaveTemplateReleaseNotes`—Returns the release notes for an Analytics template.
- `getWaveTemplates`—Returns a collection of Analytics templates.

The new methods are:

- `createDatasetVersion`—Generates a new version of an Analytics dataset by dataset ID.
- `updateDataset`—Updates an Analytics dataset by dataset ID.
- `updateDatasetVersion`—Updates an existing version of an Analytics dataset by dataset ID and version ID.

Use these wire adapters and methods to retrieve Analytics datasets and make updates.

```
import { LightningElement, api, wire } from "lwc";
import { updateDataset } from 'lightning/analyticsWaveApi';
import { ShowToastEvent } from 'lightning/platformShowToastEvent';

export default class UpdateDataset extends LightningElement {
  @api datasetId; // or fetch the ID
  updatedDataset = {
    "label" : "My Updated Dataset",
    "description" : "Updated dataset"
  }

  update(event) {
    updateDataset({ id: this.datasetId, dataset: this.updatedDataset })
      .then(() => {
        this.dispatchEvent(
          new ShowToastEvent({
            title: 'Success',
            message: 'Dataset updated',
            variant: 'success'
          })
        );
      })
      .catch(error => {
        this.dispatchEvent(
          new ShowToastEvent({
            title: 'Error updating dataset',
            message: error.body.message,
            variant: 'error'
          })
        );
      });
  }
}
```

### **lightning/uiListsApi**

This module now includes the `getListInfosByName` wire adapter to return metadata for a batch of list views.

```
import { LightningElement, wire } from 'lwc';
import { getListInfosByName } from 'lightning/uiListsApi';
import ACCOUNT_OBJECT from '@salesforce/schema/Account';
```

```
export default class WireListInfosByName extends LightningElement {

    listInfos;
    @wire(getListInfosByName, {
        names: ['$${ACCOUNT_OBJECT.objectApiName}.AllAccounts']
    })
    listInfo({ error, data }) {
        if (data) {
            this.listInfos = data.results.map(({ result }) => result);
        }
    }
}
```

**lightning/uiRecordApi**

**getRecords**—Gets data for a batch of records at once. You can request multiple objects or different record types.

```
import { LightningElement, wire } from 'lwc';
import { getRecords } from 'lightning/uiRecordApi';
import NAME_FIELD from '@salesforce/schema/Contact.Name';
import PHONE_FIELD from '@salesforce/schema/Contact.Phone';

export default class GetRecordsExample extends LightningElement {
    @wire(getRecords, {
        records: [
            {
                recordIds: ['003XXXXXXXXXXXXXXXXX', '003XXXXXXXXXXXXXXXXX'],
                fields: [NAME_FIELD],
                optionalFields: [PHONE_FIELD]
            }
        ]
    }) records;
}
```

**updateRecord**—These parameters from the [User Interface API](#) have been added.

- allowSaveOnDuplicate
- apiName
- fields
- triggerOtherEmail
- triggerUserEmail
- useDefaultRule

**lightning/uiRelatedListApi**

This module includes new wire adapters to get records and metadata for a batch of related lists.

- **getRelatedListRecordsBatch**—Returns record data for a batch of related lists.
- **getRelatedListInfoBatch**—Returns metadata for a batch of related lists.

These wire adapters to get records, metadata, and record count for a related list are now generally available.

- **getRelatedListRecords**—Returns record data for a related list.
- **getRelatedListInfo**—Returns metadata for a related list.
- **getRelatedListsInfo**—Returns metadata for related lists in an object's default layout.

- `getRelatedListCount`—Returns the record count for a related list.

```
import { LightningElement, wire } from 'lwc';
import { getRelatedListRecordsBatch } from 'lightning/uiRelatedListApi';

export default class LdsGetRelatedListRecordsBatch extends LightningElement {
  @wire(getRelatedListRecordsBatch, {
    parentRecordId: '001RM000003UNu6YAG',
    relatedListParameters: [
      {
        relatedListId: 'Contacts',
        fields: ['Contact.Name', 'Contact.Id']
      },
      {
        relatedListId: 'Opportunities',
        fields: ['Opportunity.Name', 'Opportunity.Amount']
      }
    ]
  })
}
```

For more information, see [Lightning Web Components Dev Guide: lightning/uiRelatedListApi](#) (can be outdated or unavailable during release preview).

These modules contain deprecated wire adapters or JavaScript functions.

### **lightning/uiRecordApi**

This module includes deprecated wire adapters and functions.

- `getRecordUi` (Deprecated)—Support for this wire adapter ends on May 1, 2023. We recommend using the `getRecord` and `getRecords` wire adapters instead. To load object info for lookup records, use `getRecord`, followed by `getObjectInfo` for the primary record, and `getObjectInfos` for all lookup field object infos. Retrieving a layout using an alternative wire adapter isn't currently supported.
- `getRecordInput` (Deprecated)—Support for this function ends on May 1, 2023. We recommend constructing the record object in your code with the `apiName` and `fields` properties instead.
- `refresh` (Deprecated)—Support for this function ends on May 1, 2023. We recommend using `refreshApex` or `getRecordNotifyChange` instead.

### **@salesforce/apex**

This module includes a partially deprecated function.

`refreshApex`—This function is deprecated for the non-Apex usage of the function. Support for non-Apex usage of the function ends on May 1, 2023. We recommend using the `getRecordNotifyChange` function instead to refresh record data returned by a non-Apex wire adapter. `refreshApex` continues to be supported for data returned by a wire adapter that uses Apex.

SEE ALSO:

[Component Library](#)

[Create Notifications with New Alert, Confirm, and Prompt Modules](#)

## **New and Changed Aura Components**

Build UI easily with these new and changed components.

## New Aura Components

These components are new and require API version 55.0 and later.

### **lightning:alert**

Provides a `LightningAlert.open()` function to create an alert modal that returns a promise on close.

```
<!-- c:myApp.cmp -->
<aura:component>
    <aura:import library="lightning:alert" property="LightningAlert" />
    <lightning:button onclick="{! c.openAlert }" label="Open Alert"/>
</aura:component>
```

```
/* c:myAppController.js */
({
    openAlert: function(cmp, event) {
        this.LightningAlert.open({
            message: 'this is the alert message',
            theme: 'error',
            label: 'Error!',
        }).then(function() {
            console.log('alert is closed');
        });
    }
});
```

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for details.

### **lightning:confirm**

Provides a `LightningConfirm.open()` function to create a confirm modal that returns a promise on close.

```
<!-- c:myApp.cmp -->
<aura:component>
    <aura:import library="lightning:confirm" property="LightningConfirm" />
    <lightning:button onclick="{! c.openConfirm }" label="Open Confirm"/>
</aura:component>
```

```
/* c:myAppController.js */
({
    openConfirm: function(cmp, event) {
        this.LightningConfirm.open({
            message: 'this is the confirm message',
            theme: 'warning',
            label: 'Please Confirm',
        }).then(function(result) {
            // result is true if clicked "OK"
            // result is false if clicked "Cancel"
            console.log('confirm result is', result);
        });
    }
});
```

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for more details.

**lightning:prompt**

Provides a `LightningPrompt.open()` function to create a prompt modal that returns a promise on close.

```
<!-- c:myApp.cmp -->
<aura:component>
    <aura:import library="lightning:prompt" property="LightningPrompt" />
    <lightning:button onclick="{! c.openPrompt }" label="Open Alert"/>
</aura:component>

/* c:myAppController.js */
({
    openPrompt: function(cmp, event) {
        this.LightningPrompt.open({
            message: 'this is the prompt message',
            variant: 'headerless',
            label: 'Please Respond',
            defaultValue: 'default input value',
        }).then(function(result) {
            // result is input value if clicked "OK"
            // result is null if clicked "Cancel"
            console.log('prompt result is', result);
        });
    }
});
```

See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) for more details.

**Changed Aura Components**

These components have changed.

**lightning:dualListbox**

Screen readers now read out moved items and their destination when a user moves items between lists.

**lightning:formattedRichText**

The HTML tags `b` and `i` are no longer supported. This component now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

Screen readers now read out all HTML element tags that mark text as bold, italic, and other formatted emphasis.

**lightning:inputRichText**

The HTML tags `b` and `i` are no longer supported. This component now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

Screen readers now read out HTML element tags that mark text as bold, italic, and other formatted emphasis in the text editor.

**lightning:omniToolkitAPI**

This component has a new event.

- `lightning:omniChannelWorkFlagUpdated`—Lets users get alerts for a flag change on the work that they own.

This component also has two new methods.

- `raiseAgentWorkFlag({workId, message})`—Raises a flag for this agent work item. Returns a promise that resolves to `true` on success.
  - `workId`—The ID of the work item to raise the flag on.
  - `message`—Optional. The message associated with this flag.

- `lowerAgentWorkFlag({workId})` —Lowers a flag for this agent work item. Returns a promise that resolves to `true` on success.
  - `workId`—The ID of the work item to lower the flag on.

## Accessibility Changes from Spring '22

These components had accessibility improvements in the last release that weren't announced.

Previously these components used `input` elements to create select-only comboboxes. The components now use `button` elements for select-only comboboxes to comply with the [Lightning Design System combobox blueprint](#), which was updated to meet ARIA 1.2 accessibility guidelines.

- `lightning:combobox`
- `lightning:inputAddress`
- `lightning:inputField`
- `lightning:inputName`

SEE ALSO:

[Component Library](#)

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[CommercePayments Namespace](#)

The `CommercePayments` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

[ExternalService Namespace](#)

The `ExternalService` namespace provides dynamically generated Apex service interfaces and Apex classes for complex object data types.

[Invocable Namespace \(Developer Preview\)](#)

The new `Invocable` namespace is used for calling invocable actions. It has these classes and methods.

[System Namespace](#)

The `System` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

[Apex: New Features](#)

## CommercePayments Namespace

The `CommercePayments` namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New or Changed Methods in Existing Classes

### Indicates whether this payment method can be used for recurring payments.

Use the new `autopay` property in the `CardPaymentMethodRequest` class to specify whether a token is being requested so the payment method can be used for recurring payments.

## ExternalService Namespace

The `ExternalService` namespace provides dynamically generated Apex service interfaces and Apex classes for complex object data types.

The `ExternalService` namespace doesn't define a fixed set of classes. The namespace reflects OpenAPI-compatible external service registrations with active operations for type-safe outbound calls. The object schema, in the API specification that is associated with the registered external service, maps to Apex types.

SEE ALSO:

[Salesforce Help: Invoke External Service Callouts Using Apex \(can be outdated or unavailable during release preview\)](#)

## Invocable Namespace (Developer Preview)

The new `Invocable` namespace is used for calling invocable actions. It has these classes and methods.



**Note:** Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

## New Classes

### Call invocable actions from Apex code

The new `Invocable.Action` class has these methods:

#### Create an empty invocation in preparation for making an action call

Use the `Invocable.Action.addInvocation()` method to create an empty invocation to which parameters can be added.

#### Clear the existing invocations from the action

Use the `Invocable.Action.clearInvocation()` method.

#### Create a wrapper for a custom invocable action

Use the `Invocable.Action.createCustomAction(type, name)` method.

#### Create a wrapper for a custom invocable action in a specified namespace

Use the `Invocable.Action.createCustomAction(type, namespace, name)` method.

#### Create a wrapper for a standard invocable action

Use the `Invocable.Action.createStandardAction(type)` method to create a wrapper for a Salesforce standard invocable action.

#### Get the name of an invocable action

The `Invocable.Action.getName()` method returns a string with the name of an invocable action.

#### Get the namespace of an invocable action

The `Invocable.Action.getNamespace()` method returns a string with the namespace of an invocable action. This method applies to custom invocable actions only.

**Get the type of an invocable action**

The `Invocable.Action.getType()` method returns a string with the invocable action type.

**Invoke an invocable action from Apex code**

The `Invocable.Action.invoke()` method returns an `Invocable.Action.Result` object.

**Determine whether an invocable action is standard**

The `Invocable.Action.isStandard()` method returns true if the invocable action is a Salesforce standard invocable action.

**Set a value for an invocable action parameter**

The `Invocable.Action.setInvocationParameter(parameterName, parameterValue)` method sets a named parameter to the specified value.

**Initialize the invocation for an action**

The `Invocable.Action.setInvocations(List<Map<String, Object>> invocations)` method initializes the invocations for an action from a preexisting list of invocations.

**Return the invocable action**

The `Invocable.Action.Result.getAction()` method returns the action that was invoked and caused a result to be returned.

**Provides error information from invocable actions called from Apex code**

The new `Invocable.Action.Error` class has these methods:

**Get the error code returned by an invocable action**

The `Invocable.Action.Error.getCode()` method returns a string containing an error code returned by an invocable action.

**Get the error message returned by an invocable action**

The `Invocable.Action.Error.getMessage()` method returns a string containing the error message returned by an invocable action.

**Provides results from invocable actions called from Apex code**

The new `Invocable.Action.Result` class has these methods:

**Get a list of the parameter values set for an invocable action**

The `Invocable.Action.Result.getInvocationParameters()` method returns a list that contains the input parameter values for each invocation of an action. Each map in the list contains a key for the name of each input parameter.

**Get a list of the parameter values returned by an invocable action**

The `Invocable.Action.Result.getOutputParameters()` method returns a list that contains the result for each invocation of an action. Each map in the list contains a key for the name of each output parameter.

**Determine if an invocable action ran without errors**

The `Invocable.Action.Result.isSuccess()` method returns true when the invocable action ran successfully.

**Get errors that were returned by an invocable action**

The `Invocable.Action.Result.getErrors()` method returns a list of `Invocable.Action.Error` objects.

## System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

### New Classes

**Define the modes that Apex database operations execute in (Beta)**

Use the two properties of the `AccessLevel` class to specify either user mode or system mode (default).



## New or Changed Methods in Existing Classes

### Specify whether certain database operations run in user mode or system mode (Beta)

Use the new overloaded DML methods in the `System.Database` and `System.Search` classes. The new methods add a parameter, `accessLevel`, to specify the execution mode. An example of a new method is

`Database.insert(recordToInsert, allOrNone, accessLevel)`. These method groups have new overloaded methods:

- `Database.convertLead()`
- `Database.countQuery()`
- `Database.delete()`
- `Database.insert()`
- `Database.merge()`
- `Database.undelete()`
- `Database.update()`
- `Database.upsert()`
- `Search.find()`
- `Search.query()`
- `Search.suggest()`

### Asynchronously create records for cases, leads, and custom objects

Use the `createRecordAsync` method in the `System.Network` class.

## Changed Exceptions

### Get the list of inaccessible fields when a DML operation, running in user mode, throws a `QueryException` (Beta)

Use the new `QueryException.getInaccessibleFields()` method.

SEE ALSO:

[Secure Apex Code with User Mode Database Operations \(Beta\)](#)

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

Create custom experiences in Salesforce using Connect in Apex. Get the Pardot business units the context user has access to, and 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 Connect in Apex Classes](#)

These classes are new.

[Changed Connect in Apex Input Classes](#)

These input classes have changes.

[Changed Connect in Apex Output Classes](#)

These output classes have changes.

[Changed Connect in Apex Enums](#)

These enums have changes.

SEE ALSO:

[Connect REST API](#)

[Apex Reference Guide: ConnectApi Namespace](#)

[Connect REST API Developer Guide](#)

## New Connect in Apex Classes

These classes are new.

### Commerce

These new methods are in the `ConnectApi.CommerceBuyerExperience` class.

#### Submit a job to calculate adjustment aggregates for a list of order summary IDs

- `calculateAdjustmentAggregates(webstoreId, orderSummaryIds)`

New output class: `ConnectApi.OrderSummaryAdjustmentAggregatesAsyncOutput`

#### Get a sorted page of order item summaries for a delivery group summary with specific fields and include adjustment details

- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, pageParam, pageSize, sortParam, includeAdjustmentDetails)`

#### Get an order summary

- `getOrderSummary(webstoreId, orderSummaryId, effectiveAccountId)`
- `getOrderSummary(webstoreId, orderSummaryId, effectiveAccountId, fields)`
- `getOrderSummary(webstoreId, orderSummaryId, effectiveAccountId, fields, includeAdjustmentDetails)`

### Order Management

This new method is in the new `Repricing` class.

#### Get details of a product in a web store

- `productDetails(webstoreId, skuOrProductId, effectiveAccountId, currencyCode, locale)`

New response body: `ConnectApi.ProductDetailsOutputRepresentation`

These new methods are in the `Routing` class.

#### Confirm held fulfillment order capacity

- `confirmHeldFOCapacity(confirmHeldFOCapacityInput)`

New response body: `ConnectApi.ConfirmHeldFOCapacityOutputRepresentation`

#### Get location fulfillment order capacity information

- `getFOCapacityValues(getFOCapacityValuesInput)`

New response body: `ConnectApi.GetFOCapacityValuesOutputRepresentation`

**Hold fulfillment order capacity**

- `holdFOCapacity(holdFOCapacityInput)`

New response body: `ConnectApi.HoldFOCapacityOutputRepresentation`

**Release held fulfillment order capacity**

- `releaseHeldFOCapacity(releaseHeldFOCapacityInput)`

New response body: `ConnectApi.ReleaseHeldFOCapacityOutputRepresentation`

**Pardot**

These new methods are in the new `PardotBusinessUnitContext` class.

**Get the Pardot business units the context user has access to**

- `getBusinessUnitContext()`
- `getBusinessUnitContextByIsCurrentStatus(isCurrent)`

New response body: `ConnectApi.PardotBusinessUnitContextOutput`

**Salesforce CDP**

These new methods are in the new `ConnectApi.CdpSegment` class.

**Create a CDP segment**

- `createSegment(input)`

New input class: `ConnectApi.CdpSegmentInput`

New output class: `ConnectApi.CdpSegmentOutput`

**Delete a CDP segment**

- `deleteSegment(segmentId)`

**Get CDP segments**

- `getSegment(segmentId)`
- `getSegments()`

New output class: `ConnectApi.CdpSegmentContainerOutput`

**Update a CDP segment**

- `updateSegment(segmentId, input)`

New input class: `ConnectApi.CdpSegmentInput`

New output class: `ConnectApi.CdpSegmentOutput`

**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](#).

This new method is in the `ConnectApi.ManagedContent` class.

**Get a managed content space**

- `getManagedContentSpace(contentSpaceId)`

New output class: `ConnectApi.ManagedContentSpace`

These new methods are in the `ConnectApi.ManagedContentDelivery` class.

#### Get published contents for a channel

- `getManagedContentsForChannel(channelId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`

New output class: `ConnectApi.ManagedContentDeliveryDocumentCollection`

#### Get published contents for an Experience Cloud site

- `getManagedContentsForSite(siteId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`

New output class: `ConnectApi.ManagedContentDeliveryDocumentCollection`

## Tax Platform

### Apply tax or cancel tax

- `calculateTax(calculateTax)`

New input class: `ConnectApi.CalculateTaxRequest`

New output class: `ConnectApi.CalculateTaxResponse`

## Changed Connect in Apex Input Classes

These input classes have changes.

### Order Management

#### `ConnectApi.AdjustOrderItemSummaryInputRepresentation`

This input class has this new property.

- `allocatedItemsChangeOrderType`—Process to use for `OrderItemSummary` quantities that are currently being fulfilled, defined as `QuantityAllocated - QuantityFulfilled`.

#### `ConnectApi.FindRoutesWithFewestSplitsGroupUsingOCIInputRepresentation`

This input class has this new property.

- `excludeLocations`—List of locations to exclude from the routing calculations.

### Payments

#### `ConnectApi.CardPaymentMethodRequest`

This input class has this new property.

- `autoPay`—Specifies whether a token for recurring payments is being requested (`true`) or not (`false`).

## Changed Connect in Apex Output Classes

These output classes have changes.

## CMS Managed Content

### **ConnectApi.ManagedContentChannel**

This output class has this new property.

- `cacheControlMaxAge`—HTTP cache control max age response header for content delivered from the public channel.

## Commerce

### **ConnectApi.CartSummary**

This output class has this new property.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).
- `taxType`—The tax type of the cart. Gross if prices include tax. Net if prices don't include tax.

### **ConnectApi.CommerceSearchSortRule**

This output class has these changed properties.

- `labelSuffix`—Label suffix of the sort rule. This property was added in version 54.0 but omitted from the documentation.
- `sortOrder`—Sort order for the rule. This property was added in version 54.0 but omitted from the documentation.
- `type`—This property now supports `SortByPricebook`, which uses product prices defined in the specified price book.

### **ConnectApi.OrderItemSummary**

This output class has this new property.

- `adjustmentAggregates`—Adjustment aggregates associated with an order item summary.

### **ConnectApi.OrderSummary**

This output class has this new property.

- `adjustmentAggregates`—Adjustment aggregates associated with the order summary.

### **ConnectApi.ProductSearchResults**

This output class has this new property.

- `correlationId`—Reserved for future use.

## Order Management

### **ConnectApi.AdjustOrderSummaryOutputRepresentation**

This output class has this new property.

- `inFulfillmentChangeOrderId`—ID of the change Order that holds the financial changes applicable to `OrderItemSummary` quantities that are in the process of being fulfilled. This change Order is only created for a request that specified an `allocatedItemsChangeOrderType` of `InFulfillment`.

## Salesforce CDP

### **ConnectApi.CdpQueryOutputV2**

This response body has these changed properties.

- `data`—Type changed from `List<Object>` to `List<ConnectApi.CdpQueryV2Row>`.
- `metadata`—Type changed from `Map<String, Object>` to `Map<String, ConnectApi.CdpQueryMetadataItem>`.

## 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](#).

### **ConnectApi.AbstractManagedContentReference**

This output class has this new property.

- `resourceUrl`—URL to the single content delivery resource.

### **ConnectApi.ManagedContentChannelSummary**

This output class has this new property.

- `domainUrl`—Domain URL of the channel.

### **ConnectApi.ManagedContentDeliveryDocument**

This output class became a subclass of `ConnectApi.AbstractManagedContentDeliveryDocument`. As a result, these properties were removed from `ConnectApi.ManagedContentDeliveryDocument` and are now included in `ConnectApi.AbstractManagedContentDeliveryDocument`.

- `contentKey`
- `contentType`
- `language`
- `managedContentId`
- `publishedDate`
- `title`
- `unauthenticatedUrl`
- `urlName`

### **ConnectApi.ManagedContentTypeSummary**

This output class has this new property.

- `name`—Reserved for future use.

## Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see `ConnectApi` Enums in the *Apex Reference Guide*.

## Commerce

### **ConnectApi.CommerceSearchSortRuleType**

This enum has these changed values.

- `Custom`—This value was removed.
- `SortByPricebook`—Sorts by product prices defined in the specified price book.

## API: New and Changed Items

Access more data objects and metadata types in API version 55.0.

## IN THIS SECTION:

### [New and Changed Objects](#)

Access more data through these new and changed standard objects.

### [New and Changed Standard Platform Events](#)

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

### [REST API](#)

REST API documentation has been updated for clarity and there are new and changed invocable actions.

### [SOAP API](#)

The behavior for some invalid URLs has changed and the SOAP API documentation has been streamlined.

### [Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Review Commerce Einstein and microbatching changes, work with named credentials, and participate in the Site Search and Enhanced CMS Workspaces beta.

### [CRM Analytics REST API](#)

Retrieve recipes by last modified times, status, and scheduled times. Filter folders using query parameters. Use new Pivot V2 recipe nodes and hierarchy steps in dashboards.

### [User Interface API](#)

Do more with related lists.

### [Bulk APIs](#)

Increased Apex limits, added support for populating custom Big Objects with Bulk API 2.0 ingest, and added ten PK chunking enabled objects for better query performance.

### [Tooling API New and Changed Objects](#)

These objects are new, changed, deprecated, or removed in API version 55.0.

### [Metadata API](#)

These types are new, changed, deprecated, or removed in API version 55.0.

### [Lightning Console JavaScript API](#)

The Lightning Console JavaScript API includes new and updated methods that let you customize a Lightning console app and utility bar programmatically.

## New and Changed Objects

Access more data through these new and changed standard objects.

### Salesforce Overall

#### **Get information on the metadata of a related list**

Use the new `RelatedListDefinition` object.

#### **Get information on the metadata of one column in a related list**

Use the new `RelatedListColumnDefinition` object.

### Commerce

#### **REMOVED: `TaxLocaleType` field on the `WebCart` object is removed**

The `TaxLocaleType` field on the `WebCart` object is removed in API version 55.0 and later.

**Review the tax type for your cart**

Use the new `TaxType` field on the `WebCart` object. This value matches the `TaxType` field on the `WebStore` object. This value can't be changed after you activate the store.

**Set the tax type and country for your store**

Use the new `Country` field on the `WebStore` object to set the country for the store. Use the new `DefaultTaxLocaleType` field on the `WebStore` object to set a gross or net tax policy for your store. This value can't be changed after you activate the store.

**View gross or net prices in the cart**

Use the new `GrossAdjustmentAmount`, `GrossUnitPrice`, `NetAdjustmentAmount`, `NetUnitPrice`, `TotalLineGrossAmount`, and `TotalLineNetAmount` fields on the `CartItem` object. Use the new `TotalGrossAmount` and `TotalNetAmount` fields on the `CartItemPriceAdjustment` object.

**Get a list of adjustments for a cart**

Use the new `CartId` field on the `CartItemPriceAdjustment` object.

**Create custom reports for promotions**

Use the new fields `QualifierProductCategoryName`, `QualifierProductName`, and `QualifierProductSku` on the `PromotionQualifier` object to access related values for custom report types.

Use the new fields `TargetProductCategoryName`, `TargetProductName`, and `TargetProductSku` on the `PromotionTarget` object to access related values for custom report types.

**Meet a new special access requirement for CommerceEntitlement objects**

Comply with a new special access rule, the Commerce Buyer and Entitlements Integrator permission, on the `CommerceEntitlementBuyerGroup` and `CommerceEntitlementProduct` objects.

**View price and product without changing values**

Use the new default value, `true`, on the `CanViewPrice` and `CanViewProduct` fields on the `CommerceEntitlementPolicy` object.

**View the membership of a buyer group**

Use the new `BuyerGroupMember` object.

**Sort search results by price**

Use the `SortByPriceBookId` field on the `WebStore` object to choose a price book for sorting search results.

**Get information about extension points for external services**

Use the new `ExtensionPointName` field and the new `Extension` value on the `ExternalServiceProviderType` field, on the `RegisteredExternalService` object.

**Development****Specify trusted sites allowed only for your secured custom Visualforce pages**

Use the new `VisualForce` value in the existing `context` field on the `CspTrustedSite` object.

**BEHAVIOR CHANGE: WSDL for the ShapeRepresentation object has changed.**

`Edition`, `Features`, and `Settings` fields on the `ShapeRepresentation` object have been deprecated from all API versions as a part of Org Shape feature GA. Remove these fields from your Apex and Java code to avoid compilation errors or request failures because the WSDL for the object has changed.

**Event Monitoring****Get more details about Platform SOAP API, Platform REST API, and Bulk API requests using the API Total Usage event type**

Use the `ENTITY_NAME` field to identify which objects are accessed by an API request. Use the `STATUS_CODE` field to see the HTTP response status code returned from an API request. These fields exist on other event types, such as the REST API event type.



**Monitor total API usage in versions 31–49 of the Platform SOAP, Platform REST API, and Bulk APIs**

Use the API Total Usage event type. Previously, this event type monitored usage up to version 30 of the Platform APIs. This event type can help identify requests from old and unsupported API versions.

**See more details about Lightning page performance issues**

Use the `EFFECTIVE_PAGE_TIME_DEVIATION` field to see if a page encounters issues loading. When it does, track specific causes with the `EFFECTIVE_PAGE_TIME_DEVIATION_REASON` field. Use the `EFFECTIVE_PAGE_TIME_DEVIATION_ERROR_TYPE` field to identify if errors originate with your system or on the customer's end.

**Experience Cloud****Cache public data from @wire calls to Apex methods for guest users (beta)**

Use the new `OptionsApexCDNCachingEnabled` field on the Network object.

**Filter knowledge search results by topics**

Use the new `OptionsTopicFilteringForKnowledgeSearchEnabled` field on the Network object.

**Redirect users from an external site to your Experience Cloud site**

Use the `SiteRedirectMapping` object. Introduced in API version 52.0, this object has been added to the *Object Reference Guide*.

**Field Service****Add holidays to your standard operating hours**

Use the new `OperatingHoursHoliday` object.

**Mark holiday shifts**

Use the new `IsHolidayShift` field on the existing `Shift` object.

**See absences in a combined schedule on the mobile app (Beta)**

Use the new `IsScheduleViewResourceAbsences` (Beta) field on the existing `FieldServiceMobileSettings` object.

**Propagate field values from the bundle to the bundle members**

Use the new `ApptBundlePropagatePolicy` object.

**Connect a Service Report to a Digital Signature**

Use the new `DocumentRecipient` object.

**Give customers deeper discounts**

Use the new `AdditionalDiscount` field on the existing `ServiceContract` object.

**Functions****Name and Access Salesforce Functions with Installed Managed Packages**

Control communications across namespaces with the new `Access` field in the `FunctionReference` object.

Use the new `NamespacePrefix` field with both `FunctionReference` and `FunctionInvocationRequest` objects to refer to a component in an installed managed package.

**Mobile****Identify the mobile app security assignment**

The new `MobileSecurityAssignmentId` replaces the `MobileSecurityPolicySetId` field for both `MobileSecurityPolicy` and `MobSecurityCertPinConfig` objects.

## Order Management

### Track location fulfillment order capacity

Use the new `AssignedFoCount`, `FoCapacity`, and `ShouldTrackFoCapacity` fields in the `Location` object.

### Prioritize locations when routing orders

Use the new `Priority` field in the `Location` object.

### BEHAVIOR CHANGE: You can now add `OrderSummaryId` and `Type` values to an existing `OrderPaymentSummary` record

The `OrderSummaryId` and `Type` fields in the `OrderPaymentSummary` object now support the `Create` property.

### BEHAVIOR CHANGE: You can now use the `ExternalReferenceIdentifier` field in the `OrderSummary` object to specify a record in an upsert call

The `ExternalReferenceIdentifier` field in the `OrderSummary` object now supports the `idLookup` property.

## Payments

### Indicate whether the payment method can be used for recurring payments

Use the new `IsAutoPayEnabled` field for the `Alternative Payment Method`, `Card Payment Method`, `Digital Wallet`, and `PaymentMethod` objects.

### Identify the merchant account for payment processing

Use the new `MerchantAccountId` field in the `PaymentGateway` object.

### Retrieve page layout information on the `PaymentGatewayProvided` object

Use the `describeLayout()` call to retrieve page layout information for the `PaymentGatewayProvider` object.

## Quip

### Gather more accurate Quip user engagement metrics

Use the `LastUpdatedDateOnly` field in the `CollabDocumentMetric` and `CollabTemplateMetric` objects. Use the `MetricDateOnly` field in the `CollabDocumentMetric`, `CollabDocumentMetricRecord`, `CollabTemplateMetric`, `CollabTemplateMetricRecord`, and `CollabUserEngagementMetric` objects.

## Media

### Specify an individual Targeting Category that can be used to group multiple targeting segments

Use the new `AdTargetCategory` object.

### Specify an individual Targeting Segment

Use the new `AdTargetCategorySegment` object.

### Support mapping the Target Category to all products, to a specific Media Type, or to a specific Product

Use the new `AdProductTargetCategory` object.

### Specify Ad Quote Line item for a particular category

Use the new `AdQuoteLineAdTarget` object.

### Specify Ad Order Line item for a particular category

Use the new `AdOrderLineAdTarget` object.

## Revenue

### Define the price type used when renewing a subscription for an asset

Use the `RenewalPricingType` on the `Asset` object to select the pricing used when a subscription is renewed.

**Control which type of application can consume information from a record**

Use the new `AppUsageAssignment` object in Subscription Management.

**View the billing information for one billing period of an invoiced subscription**

Use the new `BillingPeriodItem` object in Subscription Management.

**See a summarized view of the billing treatments, or rules, for invoicing orders**

Use the new `BillingPolicy` object in Subscription Management.

**See a summarized view of the billing schedules related to order items, including new orders and amendment orders**

Use the new `BillingScheduleGroup` object in Subscription Management.

**Define the rules that determine how Subscription Management invoices an order item**

Use the new `BillingTreatment` object in Subscription Management.

**Define how an order item's total price is invoiced across the order's lifecycle**

Use the new `BillingTreatmentItem` object in Subscription Management.

**Determine how much tax to credit back to a customer based on the customer's address**

Use the new `CreditMemoAddressGroup` object in Subscription Management.

**See the amount applied from a credit memo to an invoice**

Use the new `CreditMemoInvApplication` object in Subscription Management.

**See collections information on invoices**

Use the `DaysInvoiceOpen` and `DaysInvoiceOverdue` fields on the `Invoice` object to see how long an invoice has been open or overdue. Use the `FullSettlementDate` and `SettlementStatus` fields to track payments on invoices.

Use the `InvoiceBatchRunId` field to see which invoice batch run generated the invoice.

**Store customer addresses used on an invoice**

Use the new `InvoiceAddressGroup` object in Subscription Management.

**See tax information on invoice lines**

Use the `AdjustmentTaxAmount`, `ChargeAmountWithTax`, `ChargeTaxAmount`, `TaxDocumentNumber`, `TaxTransactionNumber`, and `TaxTreatmentId` fields on the `InvoiceLine` object to see details about taxes. Use the `BillingAddressId` and `ShippingAddressId` to refer to billing and shipping addresses, respectively. Use the `LineAmount` field to see the invoice line item charge. Use the `BillingScheduleId` to see the billing schedule that includes this invoice line item.

**Understand what type of order is placed, such as a new sale, cancellation, or renewal**

Use the new `OrderAction` object in Subscription Management.

**Define your company's methods and expectations for payment**

Use the new `PaymentTerm` object in Subscription Management.

**Define the details for the payment terms used in your company**

Use the new `PaymentTermItem` object in Subscription Management.

**Define whether a product is sold as a one-time sale, an evergreen subscription, or as a term-defined subscription**

Use the new `ProductSellingModel` object in Subscription Management.

**Define a many-to-many relationship between a product, how it's sold, and its proration policy**

Use the new `ProductSellingModelOptionjunction` object in Subscription Management.

**Define how subscription prices are calculated for each subscription period, including partial periods and remainder amounts**

Use the new `ProrationPolicy` object in Subscription Management.

**Monitor and troubleshoot errors that occur while processing subscription management requests**

Use the new `RevenueTransactionErrorLog` object in Subscription Management.

## Sales

### Choose Currency, Number, and Picklist Fields to Include or Exclude from Your Forecasts

Use the updated `ForecastingFilter` and `ForecastingFilterCondition` objects. Previously, the objects supported filtering only record type fields in opportunities.

### BEHAVIOR CHANGE: Add users to an Einstein Activity Capture configuration using a profile ID

The `UserId` field on the `UserEmailCalendarSync` object changed to `AssignedId`. `AssignedId` can be the profile or the user ID.

### Specify the label and translated label for forecast category metrics that appear in the Pipeline Inspection view

Use the new `PipelineInspMetricConfig` and `PipelineInspMetricConfigLocalization` objects.

## Salesforce Feedback Management

### BEHAVIOR CHANGE: There are behavior changes in the `InvitationLink` field on the `SurveyInvitation` object

The `Filter` and `Sort` properties are no longer supported for the `InvitationLink` field on the `SurveyInvitation` object.

### Add matrix questions to surveys

Use the new supported value `Matrix` in the existing `QuestionType` field on the `SurveyQuestion` object.

### Specify the ID of the parent question of a survey question

Use the new `RelatedQuestionId` field on the `SurveyQuestion` object.

### Specify the display order of a question within the parent question

Use the new `SubQuestionDisplayOrder` field on the `SurveyQuestion` object.

### Specify the display order of a question choice within the parent question

Use the new `DisplayOrder` field on the `SurveyQuestionChoice` object.

## Salesforce Flow

### View the description of a flow test associated with a flow definition (Beta)

Use the new `FlowTestView` object. For more details, see [Test One, Two, Three, Flow \(Beta\)](#)

### View the results for a flow test associated with a flow version (Beta)

Use the new `FlowTestResult` object. For more details, see [Test One, Two, Three, Flow \(Beta\)](#)

### Track responses to a recommendation when it doesn't have an ID

Use the new `RecommendationKey` field on the existing `Recommendation` object.

### Identify the developer name of the flow definition associated with an orchestration run.

Use the new `OrchestrationDeveloperName` field on the `FlowOrchestrationInstance` object.

### Identify the most recent time a user viewed a record related to an orchestration run.

Use the new `LastReferencedDate` field on the `FlowOrchestrationInstance` object.

### Identify the most recent time a user viewed an orchestration run.

Use the new `LastViewedDate` field on the `FlowOrchestrationInstance` object.

### Identify the most recent time a user viewed a record related to an orchestration work item.

Use the new `LastReferencedDate` field on the `FlowOrchestrationWorkItem` object.

### Identify the most recent time a user viewed an orchestration work item.

Use the new `LastViewedDate` field on the `FlowOrchestrationWorkItem` object.

## Salesforce Scheduler

### Create appointment invitation URL for customers who can use it to book appointments.

Use the new `AppointmentInvitation` object.

### Specify a service resource (employee or contractor) or an asset that's assigned to an appointment invitation.

Use the new `AppointmentInvitee` object.

## Security, Identity, and Privacy

### Use a SAML digest algorithm based on the selected Request Signature Method

Use the new `OptionsUseSameDigestAlgoForSigning` field on the existing `SamlSsoConfig` object. You can edit this field only for legacy SAML configurations created before Spring '22. For configurations created after Spring '22, this field is `true` by default.

### Set up single sign-on with a Microsoft authentication provider

Use the new `Microsoft` value in the existing `ProviderType` field on the `AuthProvider` object.

### BEHAVIOR CHANGE: The `IdTokenIssuer` field on the `AuthProvider` object is now available when configuring a Microsoft authentication provider

Previously, the `IdTokenIssuer` field was available only when configuring an OpenID Connect authentication provider

### BEHAVIOR CHANGE: Search for records in Security Center objects

The property `idLookup` has been added to the:

- `Scope` and `Version` fields on the `TenantSecurityConnectedApp` object
- `ActionBy` field on the `TenantSecurityMobilePolicyTrend` object
- `PackageName` and `Version` fields on the `TenantSecurityPackage` object
- `UserLicense` field on the `TenantSecurityUserActivity` object
- `Context` and `ContextType` fields on the `TenantSecurityUserPerm` object

### Store details on changes to Transaction Security policies in Security Center

Use the new `TenantSecurityTransactionPolicyTrend` object.

### Store details and changes for trusted IP ranges in Security Center

Use the `TenantSecurityTrustedIpRangeTrend` object.

### Store information about Security Center alert rules

Use the `TenantSecurityAlertRuleSelectedTenant` object.

### Identify party and brand relationships on Privacy Center consent objects

Use the `BusinessBrandId` and `PartyRoleId` fields on the existing `ContactPointConsent`, `ContactPointTypeConsent`, and `CommSubscriptionConsent` objects. Introduced in API version 54.0, these fields have been added to the SOAP API Developer Guide.

## Service

### Store more info on shift templates

Use the new `TimeSlotType` field on the existing `ShiftTemplate` object.

### Assign shift activities and track daily adherence with shift segments in Workforce Engagement

Use the new `ShiftSegment` and `ShiftSegmentType` objects.

### Create an intraday forecast in Workforce Engagement

Use the new `IH` value for Intraday in the `WorkloadType` field on the `Workload` object.

### Monitor the day's staffing needs with an intraday capacity plan in Workforce Engagement

Use the new `Intraday` value in the `PlanType` field on the `WorkforceCapacity` object.

**Perform actions on custom objects with Chat API**

Use the updated `SubjectType` field on the `LiveChatObjectAccessConfig` object.

**View a "favorited" transfer destination in the Omni-Channel softphone for voice call transfers**

Use the new `CallCtrAgentFavTrfrDest` object.

**View the sharing entry of a "favorited" transfer destination in the Omni-Channel softphone for voice call transfers**

Use the new `CallCtrAgentFavTrfrDestShare` object.

**Delete MacroUsage records**

Use the delete call on the `MacroUsage` object. This action requires the "Modify All Data" permission.

**View the status and template type of a Service Report**

Use the new `Status` field on the `ServiceReport` object and `TemplateType` field on the `ServiceReportLayout` object. Introduced in API versions 53.0 and 46.0 respectively, these fields have been added to the *Object Reference for the Salesforce Platform*.

## 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.

### Revenue

**Be notified when a Subscription Management cancellation order is complete**

Subscribe to `AssetCancelInitiatedEvent` to receive notifications when a process started by the `/asset-management/assets/collection/actions/initiate-cancellation` REST request is complete.

**Be notified when a Subscription Management renewal order is complete**

Subscribe to `AssetRenewInitiatedEvent` to receive notifications when a process started by the `/asset-management/assets/collection/actions/initiate-renew` REST request is complete.

**Be notified when a Subscription Management billing schedule is created from an order item**

Subscribe to `BillingScheduleCreatedEvent` to receive notifications when the `/actions/standard/CreateBillingScheduleFromOrderItem` REST request is complete.

**Be notified when a Subscription Management asset is created or updated from an order**

Subscribe to `CreateAssetOrderEvent` to receive notifications when the process started by the `/actions/standard/createOrUpdateAssetFromOrder` REST request is complete.

**Be notified when a Subscription Management invoice process request is started**

Subscribe to `InvoiceProcessedEvent` to receive notifications when the process started by the `/commerce/billing/invoices` REST request is complete.

**Be notified when a Subscription Management invoice is voided**

Subscribe to `VoidInvoiceProcessedEvent` to receive notifications when the process started by the `/commerce/billing/invoices/{invoiceId}/actions/void` REST request is complete.

**Be notified when a Subscription Management credit invoice process request is complete**

Subscribe to `CreditInvoiceProcessedEvent` to receive notifications when the process started by the `/commerce/billing/invoices/{invoiceId}/actions/credit` REST request is complete.

**Be notified when a Subscription Management credit memo process request is complete**

Subscribe to `CreditMemoProcessedEvent` to receive notifications when the process started by the `/commerce/billing/credit-memos` REST request or the `/commerce/billing/invoices/{invoiceId}/actions/credit` REST request is complete.

**Be notified when a payment record is created**

Subscribe to `PaymentCreationEvent` to receive notifications when the process started by the `/actions/standard/paymentSale` REST request is complete.

**Security, Identity, and Privacy****View metering-related transaction security policy behavior**

Use the new `ExemptNoAction`, `MeteringBlock`, and `MeteringNoAction` values on the `PolicyOutcome` field on all platform events and event storage objects that Transaction Security supports.

**REST API**

REST API documentation has been updated for clarity and there are new and changed invocable actions.

**Documentation**

The documentation has been improved for version 55.0.

**Documentation****We've clarified HTTP method information in the *REST API Developer Guide***

To improve the clarity of the *REST API Developer Guide*, we split several reference pages so that each page describes only one HTTP method for that resource. Previously, resources that use multiple HTTP methods only had one reference page. Now, each page describes only the relevant usage information and examples for the corresponding HTTP method.

**Invocable Actions**

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through REST API. The following actions have been added or changed:

**Limit the appearance of recommendations or offers in a recommendation strategy flow**

Use the new `limitRepetitions` action.

**Authorize a payment on a credit card**

Use the new `authorizePayment` action.

**Add an item to a Commerce web store cart**

Use the new `addCartItem` action.

**Create a Commerce web store cart**

Use the new `createCart` action.

**Delete a Commerce web store cart**

Use the new `deleteCart` action.

**Confirm held fulfillment order capacity**

Use the new `confirmHeldFulfillmentOrderCapacity` action.

**Get fulfillment order capacity information**

Use the new `getFulfillmentOrderCapacityValues` action.

**Hold fulfillment order capacity**

Use the new `holdFulfillmentOrderCapacity` action.

**Release held fulfillment order capacity**

Use the new `releaseHeldFulfillmentOrderCapacity` action.

**Exclude locations from routing calculations**

Use the new `excludeLocations` input property in the `orderRoutingFindRoutesWithFewestSplitsUsingOCI` action.

**Preview and submit price adjustments to order items in the process of being allocated.**

Use the new `allocatedItemsChangeOrderType` input property in the `adjustOrderItemSummariesPreview` and `adjustOrderItemSummariesSubmit` actions.

**Perform survey sentiment analysis**

Use the new `performSurveySentimentAnalysis` action.

**Send notifications to Slack**

Use the new `sendNotification` actions.

For more information on invocable actions, see the [Actions Developer Guide](#).

## SOAP API

The behavior for some invalid URIs has changed and the SOAP API documentation has been streamlined.

## Changes and Updates

### Changed Responses

**Changed Behavior For Some Invalid URIs**

When using the Enterprise WSDL or the Partner WSDL, the behavior for certain invalid URIs has changed.

- Case 1: The version number is invalid or unparseable. For example

```
https://MyDomainName.my.salesforce.com/c/v55.0
```

```
https://MyDomainName.my.salesforce.com/u/v55.0
```

(That version number is invalid because of the presence of the "v".) The API now defaults to version 21.0. In earlier releases, it defaults to version 7.0.

- Case 2: The WSDL type segment contains extra characters but includes 'c' or 'u'. It may or may not have a valid version number. For example

```
https://MyDomainName.my.salesforce.com/caa/55.0
```

```
https://MyDomainName.my.salesforce.com/au/v55.0
```

The API now fails with an 'InvalidApiUrlException due to Invalid typeSegment' error. In earlier releases, the request passes but defaults to API version 7.0.

### Documentation

**Duplicate content has been removed from the *SOAP API Developer Guide***

To improve content relevance and simplify navigation, some sections of the *SOAP API Developer Guide* have been removed. Previously, sections titled *Object Basics*, *Standard Objects*, *Custom Objects*, *Data Model*, and *Associated Objects* were available in both the *Salesforce Object Reference* and the *SOAP API Guide*. Because this content is about Salesforce objects and isn't specific to SOAP API, we've removed these sections from the *SOAP API Developer Guide*. This content is still available in the *Salesforce Object Reference*.



## Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Review Commerce Einstein and microbatching changes, work with named credentials, and 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 21.0 Through 30.0 Are Being Retired \(Release Update\)](#)

## New and Changed Connect REST API Resources

These resources are new or have changes.

### Briefcase Builder

#### **Get a list of records that were created or modified after a specific time and are related to an offline briefcase**

Make a GET request to the existing `/connect/briefcase/priming-records` resource.

New request parameter: `changedAfterTimestamp`

### Commerce

#### **Submit a job to calculate adjustment aggregates**

Make a POST request to the new

`/commerce/webstores/webstoreId/order-summaries/async-actions/adjustment-aggregates` resource.

New request body: Order Summary Adjustment Aggregates Async Input

New response body: Order Summary Adjustment Aggregates Async Output

#### **Get order items with adjustment details**

Make a GET request to the existing

`/commerce/webstores/webstoreId/order-summaries/orderSummaryId/items` resource.

New request parameter: `includeAdjustmentDetails`

#### **Get an order summary**

Make a GET request to the new `/commerce/webstores/webstoreId/order-summaries/orderSummaryId` resource.

**Get Commerce Einstein recommendations**

Make a GET request to the new `/commerce/webstores/webstoreId/ai/recommendations` resource.

New response body: Commerce Einstein Recommendation Results

**URL changes for Commerce Einstein resources**

These Commerce Einstein resources aren't supported in version 55.0 and later.

- `/commerce/einstein/webstores/webstoreId/status`
- `/commerce/einstein/webstores/webstoreId/configuration`
- `/commerce/einstein/webstores/webstoreId/activities/export-jobs`
- `/commerce/einstein/webstores/webstoreId/activities/export-jobs/jobId`
- `/commerce/einstein/webstores/webstoreId/activities/export-jobs/jobId/file-content`
- `/commerce/einstein/webstores/webstoreId/activities/purge-jobs`
- `/commerce/einstein/webstores/webstoreId/activities/purge-jobs/jobId`

Use these Commerce Einstein resources instead.

- `/commerce/webstores/webstoreId/ai/status`
- `/commerce/webstores/webstoreId/ai/configuration`
- `/commerce/webstores/webstoreId/ai/activities/export-jobs`
- `/commerce/webstores/webstoreId/ai/activities/export-jobs/jobId`
- `/commerce/webstores/webstoreId/ai/activities/export-jobs/jobId/file-content`
- `/commerce/webstores/webstoreId/ai/activities/purge-jobs`
- `/commerce/webstores/webstoreId/ai/activities/purge-jobs/jobId`

## Experience Cloud Sites

**Ingest microbatching records**

Make a POST request to the new `/connect/communities/communityId/microbatching` resource.

New request body: Microbatching Ingestion Input

New response body: Microbatching Ingestion Output

**Non-community URLs are no longer supported for microbatching resources**

These microbatching resources aren't supported in version 55.0 and later.

- `/connect/microbatching/errors`
- `/connect/microbatching/errors/resubmission`

Use these microbatching resources instead.

- `/connect/communities/communityId/microbatching/errors`
- `/connect/communities/communityId/microbatching/errors/resubmission`

## Named Credentials

**Get user external credentials**

Make a GET request to the new `/user-external-credential` resource.

Required request parameter: `externalCredential`

New response body: User External Credential

**Delete a user external credential**

Make a DELETE request to the new `/user-external-credential` resource.

Required request parameter: `externalCredential`

**Get the URL for the OAuth token flow for a user external credential**

Make a POST request to the new `/user-external-credential/auth-url` resource.

Required request parameter: `externalCredential`

New response body: User External Credential Auth URL

## Order Management

**Get details of a product in a web store**

Make a GET request to the new

`/commerce/order-management/webstores/webstoreId/products/skuOrProductId` resource.

New response body: Product Details Output

**Confirm held fulfillment order capacity**

Make a POST request to the new

`/commerce/order-management/routing/fulfillment-order-capacity/actions/confirm-held-capacity` resource.

New request body: Confirm Held FO Capacity Input

New response body: Confirm Held FO Capacity Output

**Get location fulfillment order capacity information**

Make a POST request to the new

`/commerce/order-management/routing/fulfillment-order-capacity/actions/get-capacity-values` resource.

New request body: Get FO Capacity Values Request Input

New response body: Get FO Capacity Values Output

**Hold fulfillment order capacity**

Make a POST request to the new

`/commerce/order-management/routing/fulfillment-order-capacity/actions/hold-capacity` resource.

New request body: Hold FO Capacity Input

New response body: Hold FO Capacity Output

**Release held fulfillment order capacity**

Make a POST request to the new

`/commerce/order-management/routing/fulfillment-order-capacity/actions/release-held-capacity` resource.

New request body: Release Held FO Capacity Input

New response body: Release Held FO Capacity Output

## Pardot

**Get the Pardot business units the context user has access to**

Make a GET request to the new `/connect/pardot/business-unit-context` resource.

New response body: Pardot Business Unit Context Output

## Salesforce CDP

### Get CDP segments

Make a GET request to the new `/ssot/segments` resource.

New response body: Salesforce CDP Segment Container Output

### Create a CDP segment

Make a POST request to the new `/ssot/segments` resource.

New request body: Salesforce CDP Segment Input

New response body: Salesforce CDP Segment Output

### Get a CDP segment

Make a GET request to the new `/ssot/segments/segmentId` resource.

New response body: Salesforce CDP Segment Container Output

### Update a CDP Segment

Make a PATCH request to the new `/ssot/segments/segmentId` resource.

New request body: Salesforce CDP Segment Input

New response body: Salesforce CDP Segment Output

### Delete a CDP segment

Make a DELETE request to the new `/ssot/segments/segmentId` resource.

## 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 published contents for a channel

Make a GET request to the new `/connect/cms/delivery/channels/channelId/contents` resource.

New response body: Managed Content Delivery Document Collection

### Get published contents for an Experience Cloud site

Make a GET request to the new `/connect/sites/siteId/cms/delivery/contents` resource.

New response body: Managed Content Delivery Document Collection

### Publish content

Make a POST request to the new `/connect/cms/contents/publish` resource.

New request body: Managed Content Publish Input

New response body: Managed Content Publish

### Unpublish content

Make a POST request to the new `/connect/cms/contents/unpublish` resource.

New request body: Managed Content Unpublish Input

New response body: Managed Content Unpublish

### Get a managed content space

Make a GET request to the new `/connect/cms/spaces/contentSpaceId` resource.

New response body: Managed Content Space

## Changed Connect REST API Request Bodies

These request bodies have changes.

### Commerce

#### Sort Rule Input

This request body has this changed property.

- `type`—This property now supports `SortByPricebook`, which uses product prices defined in the specified price book.

### Order Management

#### Adjust Order Item Summary Input

This request body has this new property.

- `allocatedItemsChangeOrderType`—Process to use for `OrderItemSummary` quantities that are currently being fulfilled, defined as `QuantityAllocated - QuantityFulfilled`.

#### Find Routes With Fewest Splits Group Using OCI Input

This request body has this new property.

- `excludeLocations`—List of locations to exclude from the routing calculations.

### Payments

#### Card Payment Method Input

This request body has this new property.

- `autoPay`—Specifies whether a token for recurring payments is being requested (`true`) or not (`false`). The token indicates that the payment method can be used for recurring payments.

## Changed Connect REST API Response Bodies

These response bodies have changes.

### CMS Managed Content

#### Managed Content Channel

This response body has this new property.

- `cacheControlMaxAge`—HTTP cache control max age response header for content delivered from the public channel.

### Commerce

#### Application Context

This response body has these new properties.

- `country`—Two-digit ISO code of the store's country.
- `shippingCountries`—Array of two-digit ISO codes of the countries to which purchases in the store can be shipped.
- `taxType`—Tax type of the store. Gross if prices include tax. Net if prices don't include tax.

#### Cart Summary

This response body has two new properties.

- `isSecondary`—Specifies whether the cart is secondary (`true`) or not (`false`).

- `taxType`—The tax type of the cart. Gross if prices include tax. Net if prices don't include tax.

### Commerce Einstein Configuration

This response body has this new property.

- `deploymentEnabled`—Specifies if the Deploy Commerce Einstein toggle is enabled on the Commerce Einstein tab in the Administration Workspace (`true`) or not (`false`).

### Order Item Summary

This response body has this new property.

- `adjustmentAggregates`—Specifies adjustment aggregates associated with the order item summary.

### Order Summary

This response body has this new property.

- `adjustmentAggregates`—Specifies adjustment aggregates associated with the order summary.

### Product Import

This response body has this new property.

- `productTaxPoliciesCreated`—Specifies the number of tax policies created during import.

### Product Search Results

This response body has this new property.

- `correlationId`—Reserved for future use.

### Sort Rule

This response body has these changed properties.

- `labelSuffix`—Label suffix of the sort rule. This property was added in version 54.0 but omitted from the documentation.
- `sortOrder`—Sort order for the rule. This property was added in version 54.0 but omitted from the documentation.
- `type`—This property now supports `SortByPricebook`, which uses product prices defined in the specified price book.

## Order Management

### Adjust Order Summary Output

This response body has this new property.

- `inFulfillmentChangeOrderId`—ID of the change Order that holds the financial changes applicable to `OrderItemSummary` quantities that are in the process of being fulfilled. This change Order is only created for a request that specified an `allocatedItemsChangeOrderType` of `InFulfillment`.

## Service Cloud

### Social Customer Service Configuration

This response body has this new property.

- `isAllFBResponseAccountsEnabled`—Indicates whether the org has access to all Facebook accounts when responding to a post (`true`) or just the Facebook account that the post was sent to (`false`).

## Salesforce CDP

### Salesforce CDP Query Output V2

This response body has these changed properties.

- `data`—Type changed from `Object[]` to `Salesforce CDP Query V2 Row[]`.
- `metadata`—Type changed from `Map<String, Object>` to `Map<String, Salesforce CDP Query Metadata Item>`.

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](#).

### Managed Content Channel Summary

This response body has this new property.

- `domainUrl`—Domain URL of the channel.

### Managed Content Delivery Document

This response body has these changes and this new property.

- `references`—Filter version changed from Small to Big.
- `referencesList`—Filter version changed from Small to Big.
- `resourceUrl`—URL to the single content delivery resource.

### Managed Content Reference

This response body has this new property.

- `resourceUrl`—URL to the single content delivery resource.

### Managed Content Reference Summary

This response body has this new property.

- `resourceUrl`—URL to the single content delivery resource.

### Managed Content Type Summary

This response body has this new property.

- `name`—Reserved for future use.

### Managed Content User Summary

This response body has this new property.

- `name`—Reserved for future use.

## CRM Analytics REST API

Retrieve recipes by last modified times, status, and scheduled times. Filter folders using query parameters. Use new Pivot V2 recipe nodes and hierarchy steps in dashboards.

For information on Einstein Discovery REST APIs, see the [Einstein Discovery REST API Developer Guide](#).

For information on Search Insights REST APIs, see the [Search Insights REST API Developer Guide](#).

### IN THIS SECTION:

[New and Changed CRM Analytics REST API Resources](#)

These resources are new or have changes.

[Changed CRM Analytics REST API Request Bodies](#)

These request bodies have changes.

[Changed CRM Analytics REST API Response Bodies](#)

These response bodies have changes.

## New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

**Get data connectors by user ID**

Make a GET request to the `/wave/dataconnectors/connectorIdOrApiName` resource.

New request parameter: `userId`

**Get recipes by status, last modified before or after times, and next schedule before or after times**

Make a GET request to the `/wave/recipes` resource.

New request parameters: `lastModifiedBefore`, `lastModifiedAfter`, `status`, `nextScheduledBefore`, and `nextScheduledAfter`

**Use the new Dataflow Node Collection in dataflow jobs**

Make a GET request to the `/wave/dataflowjobs/dataflowjobId` resource.

Response body includes new Dataflow Node Collection and Dataflow Node representations.

**Use the new Hierarchy Step in dashboards**

Make a GET request to the `/wave/dashboards/dashboardIdOrApiName` resource.

Response body includes new Hierarchy Step and Hierarchy Step Query representations.

**Create Hierarchy Steps in dashboards**

Make a POST request to the `/wave/dashboards` resource or a PATCH request to `/wave/dashboards/dashboardIdOrApiName` resource.

Request body includes new Hierarchy Step Query and Hierarchy Step Query Input representations.

**Use the new Pivot V2 node in recipes**

Make a GET request to the `/wave/recipes/id` resource.

Response body includes new Pivot V2 representation.

**Use the new Sample Parameters in recipes**

Make a GET request to the `/wave/recipes/id` resource.

Response body includes new Sample Parameters representation.

**Use the new SQL Formula Multivalue Field in recipes**

Make a GET request to the `/wave/recipes/id` resource.

Response body includes new SQL Formula Multivalue Field representation.

**Changed CRM Analytics REST API Request Bodies**

These request bodies have changes.

**Aggregate Parameters Input**

The request body has this new property.

- `pivot_v2`—The pivot V2 field.

**Append Parameters Input**

The request body has this new property.

- `allowImplicitDisjointSchema`—Indicates whether a disjoint schema merge is allowed when automatically mapping fields (`true`) or not (`false`).

**Auto-Install App Configuration Input**

The request body has this new property.

- `dynamicOptions`—A map of dynamic options used to create or update an Analytics app.



**Component Saved View State Input**

The request body has these new properties.

- `cdpObjects`—A map from `cdpObject` name to `cdpObject` state.
- `sObjects`—A map from `sObject` name to `sObject` state.

**Dashboard Saved View State Input**

The request body has these new properties.

- `cdpObjects`—A map from `cdpObject` name to `cdpObject` state.
- `sObjects`—A map from `sObject` name to `sObject` state.

**Dynamic Value Input**

The request body has these new properties.

- `compact`—Indicates whether the resolved value is compact (`true`) or not (`false`).
- `noResultsLabel`—The text to display when no results are found.

**Extract Grain Parameters Input**

The request body has this new property.

- `dateConfigurationName`—The name of the date configuration.

**Filter Item Input**

The request body has these new properties.

- `cdpObject`—the CDP data source to apply the filter to.
- `sObject`—the `sObject` dataset to apply the filter to.

**Filter Item Reference Input**

The request body has these new properties.

- `cdpObject`—the `cdpObject` in the filter section.
- `sObject`—the `sObject` in the filter section.

**Image Parameters Input**

The request body has this new property.

- `altText`—The alternate text for the image.

**Lens Visualization Options Input**

The request body has these new properties.

- `columnTotals`—Indicates whether to display column totals in the table (`true`) or not (`false`).
- `rowTotals`—Indicates whether to display row totals in the table (`true`) or not (`false`).

**Load Parameters Input**

The request body has this new property.

- `sampleDetails`—The sample parameters for the node.

**Query Input**

The request body has these new properties.

- `pivotTotals`—The pivot totals for the query.
- `totals`—The totals for the query.

**Recipe Configuration Fiscal Input**

The request body has this new property.

- `firstDayOfWeek`—The first day of week for the recipe, calendar and fiscal.

**Save Parameters Input**

The request body has this new property.

- `dateConfigurationName`—The name of the date configuration.

**Soql Step Input**

The request body has these new properties.

- `broadcastFacet`—Indicates whether the step broadcasts faceting (`true`) or not (`false`).
- `receiveFacetSource`—The source configuration for the receive facet.

**Table Widget Parameters Input**

The request body has these new properties.

- `columnTotals`—Indicates whether to display column totals in the table (`true`) or not (`false`).
- `rowTotals`—Indicates whether to display row totals in the table (`true`) or not (`false`).

**Changed CRM Analytics REST API Response Bodies**

These response bodies have changes.

**Aggregate Parameters**

The response body has this new property.

- `pivot_v2`—The pivot V2 field.

**Append Parameters**

The response body has this new property.

- `allowImplicitDisjointSchema`—Indicates whether a disjoint schema merge is allowed when automatically mapping fields (`true`) or not (`false`).

**Component Saved View State**

The response body has these new properties.

- `cdpObjects`—A map from `cdpObject` name to `cdpObject` state.
- `sObjects`—A map from `sObject` name to `sObject` state.

**Dashboard Saved View State**

The response body has these new properties.

- `cdpObjects`—A map from `cdpObject` name to `cdpObject` state.
- `sObjects`—A map from `sObject` name to `sObject` state.

**Dataflow Job**

The response body has these new properties.

- `endDate`—The end time of the job execution.
- `inputNodes`—The information for the input nodes.
- `nextRunDate`—The next time to run the job.

- `outputNodes`—The information for the output nodes.
- `retryCount`—The number of retries for the job.

### Dynamic Value

The response body has these new properties.

- `compact`—Indicates whether the resolved value is compact (`true`) or not (`false`).
- `noResultsLabel`—The text to display when no results are found.

### Extract Parameters

The response body has this new property.

- `dateConfigurationName`—The name of the date configuration.

### Filter Item

The response body has these new properties.

- `cdpObject`—the CDP data source to apply the filter to.
- `sObject`—the sObject dataset to apply the filter to.

### Filter Item Reference

The response body has these new properties.

- `cdpObject`—the `cdpObject` in the filter section.
- `sObject`—the `sObject` in the filter section.

### Image Widget Parameters

The response body has this new property.

- `altText`—The alternate text for the image.

### Load Parameters

The response body has this new property.

- `sampleDetails`—The sample parameters for the node.

### Pivot Table Lens Visualization Options

The response body has these new properties.

- `columnTotals`—Indicates whether to display column totals in the table (`true`) or not (`false`).
- `rowTotals`—Indicates whether to display row totals in the table (`true`) or not (`false`).

### Query

The response body has these new properties.

- `pivotTotals`—The pivot totals for the query.
- `totals`—The totals for the query.

### Recipe Configuration Fiscal

The response body has this new property.

- `firstDayOfWeek`—The first day of week for the recipe, calendar and fiscal.

### Table Lens Visualization Options

The response body has these new properties.

- `columnTotals`—Indicates whether to display column totals in the table (`true`) or not (`false`).

- `rowTotals`—Indicates whether to display row totals in the table (`true`) or not (`false`).

### Save Parameters

The response body has this new property.

- `dateConfigurationName`—The name of the date configuration.

### Soql Step

The response body has these new properties.

- `broadcastFacet`—Indicates whether the step broadcasts faceting (`true`) or not (`false`).
- `receiveFacetSource`—The source configuration for the receive facet.
- `visualizationParameters`—The parameters for the step visualization.

### Table Widget Parameters

The response body has these new properties.

- `columnTotals`—Indicates whether to display column totals in the table (`true`) or not (`false`).
- `rowTotals`—Indicates whether to display row totals in the table (`true`) or not (`false`).

### Template Configuration

The response body has these new properties.

- `id`—The ID or fully qualified name of the template.
- `name`—The API name of the template.
- `namespace`—The namespace of the template provider.

### Template Release Notes

The response body has these new properties.

- `id`—The ID or fully qualified name of the template.
- `name`—The API name of the template.
- `namespace`—The namespace of the template provider.

### Wave Features

The response body has these new properties.

- `canUseNLPrediction`—Indicates whether the org has the natural language prediction model enabled (`true`) or not (`false`).
- `canUseUnifiedAnalytics`—Indicates whether the org has the unified analytics enabled (`true`) or not (`false`).
- `orgCanViewTableau`—Indicates whether the org can view Tableau dashboards (`true`) or not (`false`).
- `orgHasEtlOrchestration`—Indicates whether the org has ETL orchestration enabled (`true`) or not (`false`).
- `userCanUseInsights`—Indicates whether the user can access insights (`true`) or not (`false`).

## User Interface API

Do more with related lists.

### Retrieve record data for a related list

To get record data for a related list or batch of related lists without complex URL parameters, use the new `POST` request with these resources.

`/ui-api/related-list-records/`

```
/ui-api/related-list-records/batch/
```

**Filter related list data**

Use the new `where` request parameter when retrieving record data for a related list or batch of related lists via `/ui-api/related-list-records/` or `/ui-api/related-list-records/batch/`.

**Bulk APIs**

Increased Apex limits, added support for populating custom Big Objects with Bulk API 2.0 ingest, and added ten PK chunking enabled objects for better query performance.

**Access More Generous Apex Limits**

Bulk API and Bulk API 2.0 transactions consume the higher of the effective synchronous or asynchronous per-transaction Apex limits, whichever value is greater. There is one exception: Bulk API and Bulk API 2.0 processes consume a unique governor limit for CPU time on Salesforce Servers, isolated from the generic per transaction Apex limit for maximum CPU time.

For more information, see the *Salesforce Developer Documentation*.

*Salesforce Bulk API 2.0 and Bulk API Developer Guide:* "Per-Transaction Apex Limits" in [Limits](#)

*Salesforce Apex Developer Guide:* "Per-Transaction Apex Limits" in [Execution Governors and Limits](#)

**Added Ingest Support for Big Objects in Bulk API 2.0**

Previously, support for Big Objects didn't include Bulk API 2.0 ingest. Now, support for big objects includes ingest and query for Bulk API and Bulk API 2.0.

For more information, see the *Salesforce Developer Documentation*.

*Salesforce Bulk API 2.0 and Bulk API Developer Guide:* [What's the Difference Between Bulk API 2.0 and Bulk API?](#)

*Salesforce Big Objects Implementation Guide:* [Populate a Custom Big Object](#)

**Use Ten 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.

- `ContentDistribution`
- `ContentDocument`
- `ContentVersion`
- `ConversationReason`
- `ConversationReasonExcerpt`
- `ConversationReasonGroup`
- `LoyaltyAggrPointExprLedger`
- `LoyaltyProgramMbrPromotion`
- `LoyaltyProgramPartnerLedger`
- `Voucher`

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](#)

**Tooling API New and Changed Objects**

These objects are new, changed, deprecated, or removed in API version 55.0.

## Salesforce Overall

### Get information on the metadata of a related list

Use the new `RelatedListDefinition` object.

### Get information on the metadata of one column in a related list

Use the new `RelatedListColumnDefinition` object.

### Get information about an object's related lists

Use the new `RelatedListDefinitions` field on the `EntityDefinition` object.

## Development

### Get code coverage details for the Apex classes in your package

Use the `CodeCoveragePercentages` field on the `Package2Version` object.

### Get the metadata information for the external schema of an external data source

Use the new `ExternalDataSrcDescriptor` object.

### Provide a named credential as the callout endpoint for Salesforce Connect adapter for Amazon DynamoDB

Use the `NamedCredentialId` field on the `ExternalDataSource` object.

### Get the trusted sites that only your secured custom Visualforce pages can use

Use the new `VisualForce` value in the `context` field on the `CspTrustedSites` object.

## Einstein

### Manage information about a machine learning (ML) application

Use the new `AIApplication` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

### Manage prediction configuration related to an ML application

Use the new `AIApplicationConfig` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

### Manage information about a modeling data definition associated with an ML application

Use the new `MLDataDefinition` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

### Manage information about a field in a modeling data definition associated with an ML application

Use the new `MLField` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

### Manage information about a data filter associated with an ML application

Use the new `MLFilter` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

### Manage details about a prediction associated with an ML application

Use the new `MLPredictionDefinition` object. Introduced in API version 50.0, this object has been added to the *Tooling API Developer Guide*.

## Sales

### Manage the custom filter for a forecast type

Use the new `ForecastingFilter` and `ForecastingFilterCondition` objects.

### Get more options for creating and managing forecast types

Use the `ForecastingSourceDefinition`, `ForecastingType`, and `ForecastingTypeSource` objects. Introduced in API version 52.0, these objects have been added to the *Tooling API Developer Guide*.

### Specify the label for forecast category metrics that appear in the Pipeline Inspection view

Use the new `PipelineInspMetricConfig` object.

## Salesforce CDP (Customer Data Platform)

### Retrieve metadata when creating Activation Platform packages to publish on AppExchange

Use the new `ActivationPlatform` object. Introduced in API version 54.0, this object has been added to the *Tooling API Developer Guide*.

## Salesforce Flow

### Access object data such as the description and label for a flow test (beta)

Use the new `FlowTest` object. For more information, see [Test One, Two, Three, Flow \(Beta\)](#).

## Security and Identity

### Get the domain partition for your org

Use the new `DomainPartition` field on the existing `OrgDomainLog` object.

## Service

### Define scheduling objectives for your business in Workforce Engagement.

Use the new `SchedulingObjective` object.

### Create scheduling rules to assign the right agents in Workforce Engagement.

Introduced in API version 53.0, use the new `SchedulingRule` object.

## Metadata API

These types are new, changed, deprecated, or removed in API version 55.0.

## Analytics

### Enable new Analytics features for viewing Tableau dashboards, creating legacy dataflows, and rendering embedded Analytics dashboards using Lightning Web Components

Enable these features using new fields on the `AnalyticsSettings` metadata type.

- To enable access to Tableau dashboards, use the `enableOrgCanViewTableau` field.
- To enable the creation of legacy dataflows, use the `enableCreateLegacyDataflows` field.
- To enable embedded Analytics dashboards in Lightning Experience to render using Lightning Web Components, use the `enableWaveLwcDashboards` field.

## Customer Data Platform

### Specify the datastream that a user adds to a datakit

Use the new `DataStreamTemplate` metadata type. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

## Customization

### Enable Custom Address Fields (beta)

Use the new `CustomAddressFieldSettings` metadata type.

### View the internal version of External Services used to register the API specification.

Use the new `systemVersion` field on the `ExternalServiceRegistration` metadata type.

## Development

### Provide a named credential as the callout endpoint for Salesforce Connect adapter for Amazon DynamoDB

Use the `namedCredential` field on the `ExternalDataSource` metadata type.

### Get the metadata information for the external schema of an external data source

Use the new `ExternalDataSrcDescriptor` metadata type.

### Specify trusted sites allowed only for your secured custom Visualforce pages

Use the new `VisualForce` value in the existing `context` field on the `CspTrustedSite` metadata type.

### Protect your Visualforce pages with cross-origin headers

Use the new `enableCoopHeader` and `enableCoepHeader` fields on the existing `SecuritySettings` metadata type.

## Experience Cloud

### Disable Lightning Locker in an Aura or LWR site

Use the new `isLockerServiceEnabled` property in the `mainAppPage.json` file, contained in the `config` folder on the `ExperienceBundle` type. You can disable Lightning Locker only when `isRelaxedCSPLLevel` is set to `true`.

## Field Service

### Enable enhanced scheduling and optimization

Use the new `o2EngineEnabled` field on the `FieldServiceSettings` metadata type. The default value is `false`.

### Specify the work order duration source

Use the new `workOrderDurationSource` field on the `FieldServiceSettings` metadata type.

## Mobile

### Filter records for offline use by whether `targetEntityField` is empty

To evaluate the existing `targetEntityField` on the `BriefcaseDefinition` metadata type by whether the field is empty or not empty, leave `filterValue` blank and set `filterOperator` to the `e` value (equals) or the new `n` value (not equals).

### Add relevant record data to a briefcase using related rules

Use the `relatedRules` field on the existing `BriefcaseDefinition` metadata type. When using `relatedRules`, the `relationshipField` and `relationshipType` fields are also required. Generally available in API version 55.0, these fields have been added to the *Metadata API Developer Guide*.

## Sales

### Change names of cumulative rollups of forecast categories

Use the new `ForecastingItemCategory` standard picklist field, added to [Standard Value Set Names and Standard Picklist Fields](#).

### Manage the custom filter for a forecast type

Use the new `ForecastingFilter` and `ForecastingFilterCondition` metadata types.

### Display Pipeline Inspection metrics as single forecast category rollups

Use the new `enablePipelineInspectionSingleCategoryRollup` field on the `OpportunitySettings` metadata type.

### Show service case insights on opportunities in Pipeline Inspection

Use the new `enableServiceCaseInsights` field on the `OpportunitySettings` metadata type.

### Sort past activities by the date they were completed

Use the new `enableTimelineCompDateSort` field on the `ActivitiesSettings` metadata type. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.



**Determine which assets are related to which email templates**

Introduced in API version 51.0, the `emailTemplates` field on the `ContentAssetRelationships` metadata type has been added to the *Metadata API Developer Guide*.

**Salesforce CDP (Customer Data Platform)****Package web and mobile apps**

Use the new `StreamingAppDataConnector` metadata type.

**Create a data source for Customer Data Platform**

Use the new `DataConnectorIngestApi` metadata type to store connection information specific to Ingestion API. Introduced in API version 54.0, this type has been added to the *Metadata API Developer Guide*.

**Determine which assets are related to which email templates**

The `emailTemplates` field on the `ContentAssetRelationships` metadata type has been added to the *Metadata API Developer Guide*.

**Salesforce Flow****Perform survey sentiment analysis in a flow**

Use the new `performSurveySentimentAnalysis` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

**Use a formula as a flow's entry condition**

Use the new `filterFormula` field on the `FlowStart` subtype of the `Flow` metadata type.

**Limit the appearance of recommendations or offers in a recommendation strategy flow**

Use the new `limitRepetitions` value in the existing `actionType` field on the `Flow` metadata type.

**Publish a `FlowOrchestrationEvent` platform event to wake up a paused orchestration from a flow, Apex, or workbench**

Use the new `$Orchestration.Instance` system variable as the `OrchestrationInstanceId`. For more information, see [Wake Up Paused Orchestrations](#).

**Add section headers to flow screens**

Use the new `regionContainerType` field on the existing `FlowScreenField` subtype of the `Flow` metadata type. Available only when the component type is `Section`.

**Create a flow test associated with a flow version (Beta)**

Use the new `FlowTest` metadata type. For more details, see [Test One, Two, Three, Flow \(Beta\)](#) on page 569

**Send screen flows to Slack (Beta)**

Use the new `slackSendMessageToLaunchFlow` value in the `actionType` field on the `Flow` metadata type. For more information, see [Send Screen Flows to Slack with an Invocable Action \(Beta\)](#).

**Authorize a payment on a credit card**

Use the new `authorizePayment` value in the existing `actionType` field on the `Flow` metadata type.

**Add an item to a Commerce web store cart**

Use the new `addCartItem` value in the existing `actionType` field on the `Flow` metadata type.

**Create a Commerce web store cart**

Use the new `createCart` value in the existing `actionType` field on the `Flow` metadata type.

**Delete a Commerce web store cart**

Use the new `deleteCart` value in the existing `actionType` field on the `Flow` metadata type.

**Confirm held fulfillment order capacity**

Use the new `confirmHeldFulfillmentOrderCapacity` value in the existing `actionType` field on the Flow metadata type.

**Get fulfillment order capacity information**

Use the new `getFulfillmentOrderCapacityValues` value in the existing `actionType` field on the Flow metadata type.

**Hold fulfillment order capacity**

Use the new `holdFulfillmentOrderCapacity` value in the existing `actionType` field on the Flow metadata type.

**Release held fulfillment order capacity**

Use the new `releaseHeldFulfillmentOrderCapacity` value in the existing `actionType` field on the Flow metadata type.

**View the name of the workflow rule a flow migrate from**

Use the `migratedFromWorkflowRuleName` field on the Flow metadata type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

**Evaluate whether records meet conditions after triggering an update**

Use the `doesRequireRecordChangedToMeetCriteria` field on the FlowRule and FlowStart subtype of the Flow metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

**Trigger a flow when a record is deleted**

Use the `delete` value in the existing `recordTriggerType` field on the FlowStart subtype of the Flow metadata type. Introduced in API version 50.0, this value has been added to the *Metadata API Developer Guide*.

**Specify a flow's scheduled paths**

Use the `scheduledPaths` field on the FlowStart subtype of the Flow metadata type. Introduced in API version 51.0, this field has been added to the *Metadata API Developer Guide*.

**Define a flow's scheduled path**

Use the `FlowScheduledPath` subtype of the Flow metadata type. Introduced in API version 51.0, this subtype has been added to the *Metadata API Developer Guide*.

**Specify a flow's filter conditions logic**

Use the `filterLogic` field on the FlowStart subtype of the Flow metadata type. Introduced in API version 50.0, this field has been added to the *Metadata API Developer Guide*.

**Send a notification to Slack**

Use a new `sendNotification` value in the existing `actionType` field on the Flow metadata type. Each `sendNotification` value corresponds to a supported notification type.

**Security and Identity****Bypass metering-based blocks for transaction security policies**

Use the new `bypassMeteringBlock` field on the existing EventSettings metadata type.

**Redirect your force.com sites to your My Domain sites with enhanced domains**

Use the new `redirectForceComSiteURLs` field on the existing MyDomainSettings metadata type.

**Use enhanced domains by default in new sandboxes**

Use the new `useEnhancedDomainsInSandbox` field on the existing MyDomainSettings metadata type.

**Use a SAML digest algorithm based on the Request Signature Method**

Use the new `useSameDigestAlgoForSigning` field on the existing `SamlSsoConfig` metadata type. You can edit this field only for legacy SAML configurations created before Spring '22. For configurations created after Spring '22, this field is `true` by default.

**Set up single sign-on with a Microsoft authentication provider**

Use the new `Microsoft` value in the existing `providerType` field on the `AuthProvider` metadata type.

**BEHAVIOR CHANGE: The `idTokenIssuer` field on the `AuthProvider` metadata type is now available when configuring a Microsoft authentication provider**

Previously, the `idTokenIssuer` field was available only when configuring an OpenID Connect authentication provider.

**Get the domain partition for your org**

Use the new `domainPartition` field on the existing `MyDomainSettings` metadata type.

**Configure required values when using Apple as a third-party authentication provider**

Use the `appleTeam` and `ecKey` fields on the existing `AuthProvider` metadata type. Introduced in API version 48.0, these fields have been added to the *Metadata API Developer Guide*.

## Slack

**Customize your app's info, configuration, and connection**

Use the new `slackapps` metadata type. For more information, see [Apex SDK for Slack](#)

**Compose components into views to guide users through your app's capabilities.**

Use the file suffix `.view` for the view definition. This type extends the [MetadataWithContent](#) metadata type.

## Service

**Turn on the Intraday Management dashboard and track agents' daily schedule adherence**

Use the new `enableIntradayManagement` and `enableRealTimeAdherence` fields on the `WorkforceEngagementSettings` metadata type.

**Define scheduling objectives for your business in Workforce Engagement**

Use the new `SchedulingObjective` metadata type.

## Lightning Console JavaScript API

The Lightning Console JavaScript API includes new and updated methods that let you customize a Lightning console app and utility bar programmatically.

Omni-Channel in Lightning Experience

**Where:** These changes apply to Lightning Experience only.

**Raise or lower a flag on an agent work item**

Use the new `raiseAgentWorkFlag` and `lowerAgentWorkFlag` methods and the new `lightning:omniChannelWorkFlagUpdated` for Omni-Channel.

## Einstein

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Get insights from unstructured text with Einstein Discovery Text Clustering. Einstein Prediction Builder is easier to use with a new guided flow and automatic data-checking as you build. Plus, Einstein Reply Recommendations can identify common replies in 16 languages, helping your agents provide consistent messaging to your global customer base. Read on to discover even more productivity-boosting Salesforce Einstein features.

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## Salesforce Overall

### Allow Data Analysis with Einstein Data Exploration Consent

Work smarter with Einstein features when you permit Salesforce data scientists to explore and improve your data.

### Einstein Search

Einstein Search now provides a more efficient search experience. Discover your users searchable objects and fields with Search Manager. Help users find the most relevant articles with Salesforce Knowledge. Users can get extracted text for their search questions using Einstein Search Answers. And users can quickly refine their searches by filtering out topics in Experience Cloud sites.

## Analytics

### Einstein Discovery

Reveal untapped insights from your unstructured data with text clustering. Fine-tune prediction accuracy with trending data. Handle missing values in your datasets.

## Commerce

### Commerce Einstein

Personalize consumer experiences using Commerce Einstein AI-powered merchandising tools in B2B Commerce on Lightning Experience and B2B2C Commerce storefronts.

## Customization

### Einstein Prediction Builder

Discover the new Guided Setup flow to build predictions. The new flow lets you quickly iterate your predictions and save your settings so you can build when you're ready. Data Checker also automatically checks if you have enough records to build and lets you know whether you can build successfully.

## Development

### Einstein Vision

Use the power of artificial intelligence (AI) to add personalization to documents. Extract structured data from custom forms and invoices with Einstein OCR (beta).

## Industries

### Einstein Relationship Insights

Learn about your prospects from your colleagues before you contact them. Broaden the scope of your relationship recommendations by exploring documents in Salesforce Files. Determine the data structure and how to process data by identifying structured relationships between Salesforce records. Correct misclassified person or company records. Learn about Einstein's brand changes.

### Intelligent Form Reader

Now, setting up data extraction and managing mappings is simpler and easier. You can create a single mapping with multiple objects and delete forms in a mapping. Intelligent Form Reader is compliant with data residency requirements of some more countries.

## Sales

### Sales Cloud Einstein

Estimate the value your business will see from Einstein Lead Scoring with the updated Readiness Assessor.

## Service

### Einstein for Service

Go global with multi-language Reply Recommendations. Deflect cases and improve case handling time by integrating Case Classification and Article Recommendations with Flows. Try Article Recommendations for Conversations. Build bots faster using your own bot templates. Build rich conversational experiences with enhanced bots, which include support for more flexible routing and rich content. And, use the upgraded Einstein Bots API and Java SDK to launch bots using the channels and languages that your customers need.

## Experience Cloud

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Customers with Experience Cloud licenses can reap the benefits of full access to all the features included in Salesforce CMS. On LWR sites, you can build flows across all templates and add links to button and form components or any layout component that can be made into a link. Enhancements to Mobile Publisher for Experience Cloud apps make app navigation easier.



**Tip:** The [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:

#### [LWR and Aura Sites](#)

Show your LWR site to your users in the language that matches their browser settings. Let your Aura site users deactivate their account from within the site. Enjoy improved clarity and efficiency in Experience Builder with user interface enhancements.

### Components in Experience Builder

Add links to your content and layout components, start using flows in your LWR sites, and allow Aura users to deactivate their account.

### Developer Productivity

For improved performance and flexibility, you can disable Lightning Locker programmatically. On custom Aura components, optional URL query parameters are now enabled for all customers. And the `@salesforce/community` scoped module now returns IDs that are 18 characters long.

### Site Performance

Enjoy enhanced site performance with new features that improve visitors' experience. High-volume sites can create more records simultaneously without slowing down. The new Too Many Requests page gives visitors a place to land when your site has unusually high traffic. On your LWR site, you can cache Apex requests for guests on CDN for Digital Experiences.

### Security and Sharing

Understand the new permission structure for fields that secure personal information, use single sign-on with Microsoft credentials, and check out security changes for your guest users.

### Other Changes

Learn about additional changes that improve Experience Cloud.

## LWR and Aura Sites

Show your LWR site to your users in the language that matches their browser settings. Let your Aura site users deactivate their account from within the site. Enjoy improved clarity and efficiency in Experience Builder with user interface enhancements.

### IN THIS SECTION:

#### Use 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. And with enhanced Salesforce CMS workspaces, you can create, manage, and publish content more easily. Behind the scenes, a rearchitected platform powers these beta features. After you enable the beta features, the sites and enhanced CMS workspaces that you create are hosted together on our flexible, unified back end.

#### Create Multilingual LWR Sites (Generally Available)

You can publish sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. This feature, which is now generally available, includes a change since the last release.

#### Localized Language Is Automatically Detected for LWR Sites

When your customers access an LWR site, they now see the localized language as set by their browser. Previously, users saw the site in its default language, regardless of their browser settings.

#### Work Smoothly with Usability Enhancements in Experience Builder

Experience Builder users can benefit from improved clarity and efficiency in the builder's user interface. For LWR sites, a new dropdown menu in component property panels makes duplicating components a breeze. Revised labels clarify text styles in relation to HTML tags in LWR sites. And for improved readability for all, Experience Builder now uses the native sans serif font on your operating system.

#### Redirect Your Previous Force.com Site URLs

To minimize the potential disruption for visitors to your previous `*.force.com` site URLs after you enable enhanced domains, choose whether to redirect those public-facing URLs to your current site URL.


#### Refine Knowledge Search Results with Topic Filters

Search faster and more effectively. Use multiple filters to get the best results.

## Use 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. And with enhanced Salesforce CMS workspaces, you can create, manage, and publish content more easily. Behind the scenes, a rearchitected platform powers these beta features. After you enable the beta features, the sites and enhanced CMS workspaces that you create are hosted together on our flexible, unified back end.

**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](#).

**Why:** Since the previous release, we added several features. Now you can:

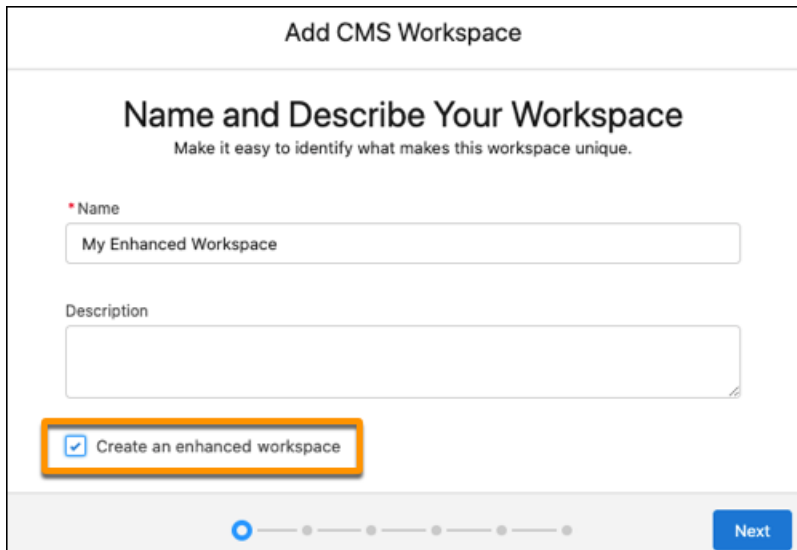
- Configure Google Analytics 4 in Experience Builder in **Settings > Integrations**.
- Add contributor roles in authenticated sites in **Workspaces > Administration**.
- Insert videos, images, formatted links, and apply paragraph heading styles in the content editor in enhanced CMS workspaces.
- Streamline content creation by adding sidebar extensions to the content editor in enhanced CMS workspaces.
- Unpublish and delete CMS content more easily with better visibility into other affected content items or records.

**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.

 **Note:** Google Analytics 4 is available only in orgs created in Summer '22 or later.

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 after you enable the beta features.

When creating a workspace in the Digital Experiences app, select **Create an enhanced workspace**. After you add content in the enhanced workspace, you can share it with your new Build Your Own (LWR) site.



SEE ALSO:

[Site Search & Enhanced CMS Workspaces \(Beta\)](#) (can be outdated or unavailable during release preview)

## Create Multilingual LWR Sites (Generally Available)

You can publish sites in up to 20 languages using the Build Your Own (LWR) and Microsite templates. This feature, which is now generally available, includes a change since the last release.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** On standard components that come with the LWR templates (Build Your Own and Microsite), translatable text-entry fields, such as titles and descriptions, are defined as `translatable="true"`. On custom Lightning web components, developers can make a String property translatable by defining it as `translatable="true"` in the component's `js-meta.xml` file.

On the **Settings > Languages** page in Experience Builder, add your desired new languages to the Site Languages list. Then export the site content for translation, and when it's ready, import the translated .xlf file. You can also add translations directly into component property panels in Experience Builder.

This change is new since the last release: An improved version of the .xlf file format helps you scale for the future. If you exported your site content before Summer '22, export it again to ensure that you and your translator are working with the most recent version of the .xlf format. You can't upload older versions of the .xlf format to your site.

SEE ALSO:

[LWR Sites for Experience Cloud Developer Guide: Create a Multilingual LWR Site \(can be outdated or unavailable during release preview\)](#)

## Localized Language Is Automatically Detected for LWR Sites

When your customers access an LWR site, they now see the localized language as set by their browser. Previously, users saw the site in its default language, regardless of their browser settings.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Automatic language detection works when you republish your LWR site and the site has a localized version. This feature is on by default in your org. Contact Salesforce Customer Support if you want to disable it.

Let's say your site has English as the default language, but also has a French version.

- When guest users access the site, they see the site in their browser's default language.
- When authenticated users access the site, they see the language set in their user profile. If the user profile language or the browser languages aren't supported by the site, users see the site default language instead.

If users change their language preferences with the Language Selector component or their user locale, the new preference is saved and used the next time the site is accessed.

## Work Smoothly with Usability Enhancements in Experience Builder

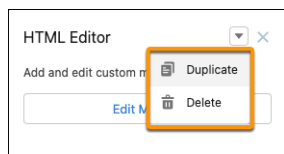
Experience Builder users can benefit from improved clarity and efficiency in the builder's user interface. For LWR sites, a new dropdown menu in component property panels makes duplicating components a breeze. Revised labels clarify text styles in relation to HTML tags in LWR sites. And for improved readability for all, Experience Builder now uses the native sans serif font on your operating system.

**Where:** This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

- New dropdown menu and changes to text style labels appear in Experience Builder for LWR sites.
- Font enhancements appear in Experience Builder for Aura and LWR sites.

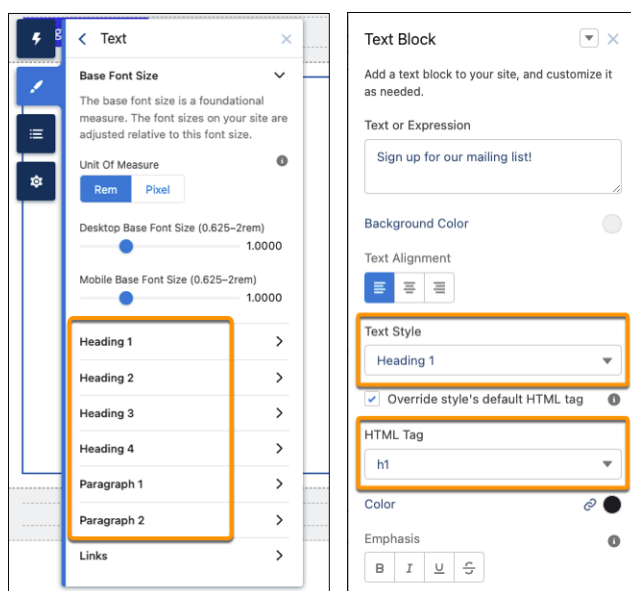


**How:** Component property panels in Lightning Web Runtime sites feature a new dropdown menu where you can duplicate or delete the component with one easy click—just like in Aura sites.



In LWR sites, updated text style labels in the Theme panel indicate more precisely the relationship between each text element and its default HTML tag. For example, Extra Large Heading is now Heading 1, associated with the default HTML tag h1.

These label updates also appear in the property panel for the Text Block component. If you want to change the HTML tag for a particular text element, the revised labels present a clearer idea of how the change translates visually on screen.



And for users who work on Aura or LWR sites, Experience Builder now uses your operating system's default sans-serif font, just like Lightning Experience does. The default font for each operating system is designed for optimal legibility, making it easier and more comfortable for most users to read than the Salesforce Sans font.

Also for improved legibility, some styles in the Experience Builder user interface were refreshed. For example, tab titles that were in all capital letters are now mixed case.

The image shows a side-by-side comparison of the 'Old UI' and 'New UI' for configuring a page in Experience Builder. Both interfaces have a 'PROPERTIES' tab and a 'PAGE VARIATIONS' tab. The 'Old UI' has a blue header bar, while the 'New UI' has a white header bar with blue text. The 'Old UI' has a 'Name' field with a blue border and a 'Home' button. The 'New UI' has a 'Name' field with a grey border and a 'Home' button. The 'Old UI' has a 'URL' field with a blue border and a '/' button. The 'New UI' has a 'URL' field with a grey border and a '/' button. The 'Old UI' has an 'API Name' field with a blue border and a 'Home' button. The 'New UI' has an 'API Name' field with a grey border and a 'Home' button. The 'Old UI' has a 'Page Access' dropdown menu with a blue border and a 'Site Default Setting: Requires Login' option. The 'New UI' has a 'Page Access' dropdown menu with a grey border and a 'Site Default Setting: Requires Login' option. The 'Old UI' has an 'SEO' section with a blue border and a 'Title' field with a blue border. The 'New UI' has an 'SEO' section with a grey border and a 'Title' field with a grey border. The 'Old UI' has a 'Description' field with a blue border. The 'New UI' has a 'Description' field with a grey border.

## Redirect Your Previous Force.com Site URLs

To minimize the potential disruption for visitors to your previous \*.force.com site URLs after you enable enhanced domains, choose whether to redirect those public-facing URLs to your current site URL.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Redirect Your Site URLs After You Enable Enhanced Domains](#)

## Refine Knowledge Search Results with Topic Filters

Search faster and more effectively. Use multiple filters to get the best results.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Refine Knowledge Search Results with Topic Filters in Experience Cloud Sites](#)

## Components in Experience Builder

Add links to your content and layout components, start using flows in your LWR sites, and allow Aura users to deactivate their account.

## IN THIS SECTION:

[Let Your Site Users Deactivate Their Account](#)

Late in Spring '22, the Customizable User Settings component was updated to include new properties that let your users deactivate their account from within Aura sites.

[Add Links to Content and Layout Components in LWR Sites](#)

You can now select a link source, such as a site page, external link, or data binding expression, and add it to the Button, Contact Form, and Lead Form components, or any layout component that can be made into a link. You can also select the type of link that you're creating: a link, email, or phone call. After you select the link source and type, use the property panel to link to a page or expression or enter a URL. Previously, admins could only add URLs as links.

[Use Flows in LWR Sites](#)

Ready to automate your processes and use them on your lightning-fast sites? Us too! Flows are now available in LWR sites, across all LWR templates. With flows, you can harness the unlimited flexibility of Flow Builder to show screen flows on your site. To use flows in LWR, build them with Lightning web components. Flows built with Aura components can't run in LWR sites.

[Add Messaging for Web to an Experience Site \(Generally Available\)](#)

Add the Embedded Messaging component from the Experience Builder panel to your Aura site to start a conversation with customers. The component provides a quick connection point to access Messaging for Web features.

## Let Your Site Users Deactivate Their Account

Late in Spring '22, the Customizable User Settings component was updated to include 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.

The screenshot shows the 'Account Details' configuration panel. It includes the following fields and options:

- Section Header:** A text input field containing 'Account'.
- Hide the Deactivate Account section:** A checkbox that is currently unchecked.
- Deactivate Account Section Label:** A text input field containing 'Deactivate Account'.
- Deactivate Account Button Label:** A text input field containing 'Deactivate My Account'.
- Deactivate Account Confirmation Title:** A text input field containing 'Deactivate your account?'.
- Deactivate Account Confirmation Message:** A text area containing the message: 'After you deactivate your account, you'll lose access to this site.'
- Account Deactivation Confirmation Button Label:** A text input field containing 'Got It'.
- Account Deactivation Error Message:** A text area containing the message: 'Something went wrong. Contact your site administrator.'



**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 *Delete* rather than *Deactivate*. 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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable User Self-Deactivation \(can be outdated or unavailable during release preview\)](#)

## Add Links to Content and Layout Components in LWR Sites

You can now select a link source, such as a site page, external link, or data binding expression, and add it to the Button, Contact Form, and Lead Form components, or any layout component that can be made into a link. You can also select the type of link that you're creating: a link, email, or phone call. After you select the link source and type, use the property panel to link to a page or expression or enter a URL. Previously, admins could only add URLs as links.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

## Use Flows in LWR Sites

Ready to automate your processes and use them on your lightning-fast sites? Us too! Flows are now available in LWR sites, across all LWR templates. With flows, you can harness the unlimited flexibility of Flow Builder to show screen flows on your site. To use flows in LWR, build them with Lightning web components. Flows built with Aura components can't run in LWR sites.

**Where:** This change applies to [LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

## Add Messaging for Web to an Experience Site (Generally Available)

Add the Embedded Messaging component from the Experience Builder panel to your Aura site to start a conversation with customers. The component provides a quick connection point to access Messaging for Web features.

**Where:** This change applies to [Aura sites](#) accessed through Enterprise, Unlimited, and Performance editions for Service Cloud with the Digital Engagement — Messaging for In-App and Web SKU. This change also applies to the Service Cloud Unlimited Edition with a Messaging for In-App and Web SKU.

**When:** The Aura component and Messaging for Web will be available starting June 15, 2022.

#### SEE ALSO:

[Connect Messaging for Web to an Experience Site \(Generally Available\)](#)

## Developer Productivity

For improved performance and flexibility, you can disable Lightning Locker programmatically. On custom Aura components, optional URL query parameters are now enabled for all customers. And the `@salesforce/community` scoped module now returns IDs that are 18 characters long.

## IN THIS SECTION:

[Update Sites with the Lightning Locker Property](#)

When retrieved, ExperienceBundle now includes the property to disable Lightning Locker, making it easier to programmatically update your Aura and LWR sites. Previously, ExperienceBundle didn't include the `isLockerServiceEnabled` property in the `mainAppPage.json` file contained in the config folder.

[Optional URL Query Parameters Are Now Enabled for All](#)

In Winter '19, to improve performance and flexibility, we enabled optional URL query parameters for custom Aura components. However, a small number of customers missed out on that update. Now this feature is supported for all customers.

[@salesforce/community Supports 18-Character IDs](#)

For consistency with other Salesforce APIs, the `@salesforce/community` scoped module now returns IDs that are 18 characters long. Previously, the scoped module returned 15-character IDs.

## Update Sites with the Lightning Locker Property

When retrieved, ExperienceBundle now includes the property to disable Lightning Locker, making it easier to programmatically update your Aura and LWR sites. Previously, ExperienceBundle didn't include the `isLockerServiceEnabled` property in the `mainAppPage.json` file contained in the config folder.

**Where:** This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Before setting `isLockerServiceEnabled` to `false`, you must set `isRelaxedCSPLLevel` to `true`.

You can also disable Lightning Locker for a site in **Experience Builder > Settings > Security & Privacy** when Relaxed CSP is enabled. Disabling Lightning Locker can cause security flaws in your site and can prevent third-party components from being available at design time and from rendering at runtime.

## SEE ALSO:

[Salesforce Help: Resolve Lightning Locker Conflicts in Experience Builder \(can be outdated or unavailable during release preview\)](#)

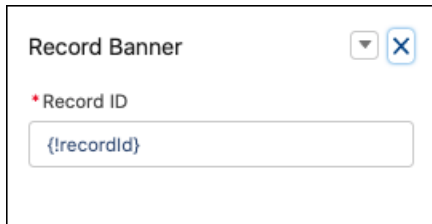
[Salesforce Help: Enable Third-Party Components to Run When Lightning Locker is Off \(can be outdated or unavailable during release preview\)](#)

## Optional URL Query Parameters Are Now Enabled for All

In Winter '19, to improve performance and flexibility, we enabled optional URL query parameters for custom Aura components. However, a small number of customers missed out on that update. Now this feature is supported for all customers.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Previously, when a property value in a custom Aura component used expression language but wasn't passed the expected value from the URL, the value remained as an expression, which could cause unexpected behavior. Now, if a component expects to be passed a value dynamically—for example, a value for `{!recordId}`—but doesn't receive it, `{!recordId}` is replaced with an empty string value.



## @salesforce/community Supports 18-Character IDs

For consistency with other Salesforce APIs, the `@salesforce/community` scoped module now returns IDs that are 18 characters long. Previously, the scoped module returned 15-character IDs.

**Where:** This change applies to [Aura and LWR sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

## Site Performance

Enjoy enhanced site performance with new features that improve visitors' experience. High-volume sites can create more records simultaneously without slowing down. The new Too Many Requests page gives visitors a place to land when your site has unusually high traffic. On your LWR site, you can cache Apex requests for guests on CDN for Digital Experiences.

### IN THIS SECTION:

#### [Create Records More Efficiently for High-Volume Sites](#)

Enable your high-volume site to create five times as many records simultaneously without slowing down. When users submit their requests, they're collected and then asynchronously processed in batches. This change improves performance and keeps your site moving during heavy traffic spikes.

#### [Shared Certificate Option Is Being Retired](#)

The shared certificate option for CDN for Digital Experiences is being retired in Winter '24. If you have a custom domain on a shared certificate, switch it to a single certificate. Single certificates provide better security and a single-branded environment.

#### [Cache Apex Calls for Guest Users Only \(Beta\)](#)

Control whether Apex requests for guests are cached on CDN for Digital Experiences. Caching requests improves the performance of your LWR site.

#### [Tell Customers When There's Too Much Traffic](#)

When your site has higher than usual traffic, customers see the Too Many Requests (TMR) page. The page refreshes every 30 seconds and redirects customers when the site is available. You can customize the page to fit your brand, or use it as is. Find it in the Pages menu in Experience Builder. The TMR page is enabled for sites using enhanced domains and Salesforce's CDN for Digital Experiences.

#### [Service Not Available Page Is Supported on Salesforce Edge Network](#)

The Service Not Available (SNA) page is now supported on the Salesforce Edge Network. The SNA page is enabled for all sites that use CDN for Digital Experiences.

#### [Test a Custom Domain with the Salesforce CDN Partner in a Sandbox](#)

Roll out changes to a custom domain such as `https://www.example.com` with confidence. Now you can test a custom domain that uses the Salesforce CDN partner to serve your site in a sandbox before you enable the updated domain in production.

### [Test Your Site's Custom Domain That Uses a Third-Party CDN](#)

Before you enable a custom domain that uses a third-party Content Delivery Network (CDN) to serve your Experience Cloud site, test it in a sandbox.

## Create Records More Efficiently for High-Volume Sites

Enable your high-volume site to create five times as many records simultaneously without slowing down. When users submit their requests, they're collected and then asynchronously processed in batches. This change improves performance and keeps your site moving during heavy traffic spikes.

**Where:** This change applies to [Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Select the **Create records in batches** checkbox on the Create Record Form component settings to process the creation of leads, cases, and custom objects in batches.

[Connect REST API](#) supports batch creation of records.

SEE ALSO:

[Use Experience Builder to Configure Record Creation in Batches for High-Volume Sites](#)

[Use Apex to Configure Record Creation in Batches for High-Volume Sites](#)

## Shared Certificate Option Is Being Retired

The shared certificate option for CDN for Digital Experiences is being retired in Winter '24. If you have a custom domain on a shared certificate, switch it to a single certificate. Single certificates provide better security and a single-branded environment.

**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: Considerations for Using Salesforce's CDN for Digital Experiences \(can be outdated or unavailable during release preview\)](#)

## Cache Apex Calls for Guest Users Only (Beta)

Control whether Apex requests for guests are cached on CDN for Digital Experiences. Caching requests improves the performance of your LWR site.

**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](#).

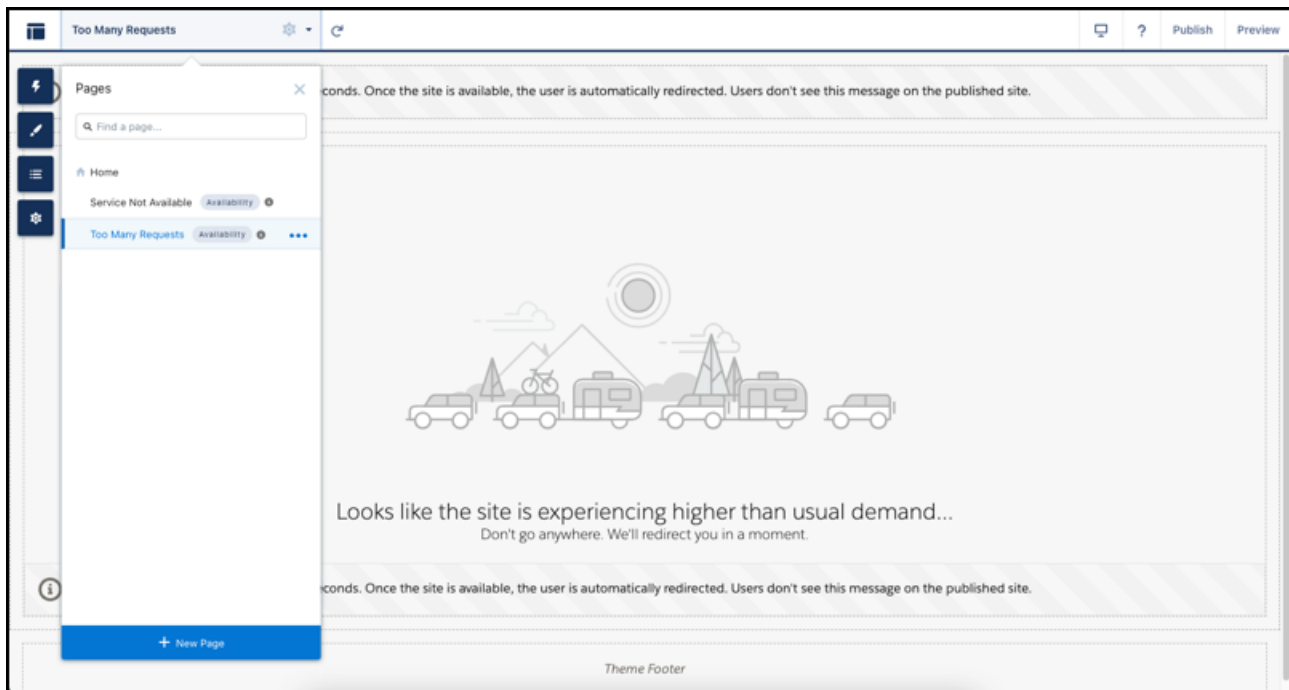
**How:** To enable caching for guest users, select **Cache public data from Apex methods for guest users** in Preferences on the Administration tile of your site's workspaces. Use `@wire` (in LWC) to invoke publicly cacheable Apex actions. Only Apex methods annotated with `@AuraEnabled(cacheable=true scope='global')` are cached.

## Tell Customers When There's Too Much Traffic

When your site has higher than usual traffic, customers see the Too Many Requests (TMR) page. The page refreshes every 30 seconds and redirects customers when the site is available. You can customize the page to fit your brand, or use it as is. Find it in the Pages menu in Experience Builder. The TMR page is enabled for sites using enhanced domains and Salesforce's CDN for Digital Experiences.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

**How:** The Too Many Requests page is enabled for all sites that use Salesforce's CDN for Digital Experiences.



## Service Not Available Page Is Supported on Salesforce Edge Network

The Service Not Available (SNA) page is now supported on the Salesforce Edge Network. The SNA page is enabled for all sites that use CDN for Digital Experiences.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least [one active community license](#) in your org to use this feature.

## Test a Custom Domain with the Salesforce CDN Partner in a Sandbox

Roll out changes to a custom domain such as `https://www.example.com` with confidence. Now you can test a custom domain that uses the Salesforce CDN partner to serve your site in a sandbox before you enable the updated domain in production.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) served by a custom domain and accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Only single certificates are supported for custom domains on the Salesforce CDN partner in a sandbox. Government Cloud Plus orgs are currently excluded from using custom domains on the Salesforce CDN partner in a sandbox.

**How:** In production, on the Domains Setup page, edit your custom domain. Select the HTTPS option, **Salesforce serves the domain over HTTPS using a Salesforce content delivery network (CDN) partner**. In the Associated Org field, select your sandbox, and save



your changes. After Salesforce provisions your changes, activate the custom domain in production. Then log in to the sandbox to finish updating the sandbox Experience Cloud sites domains.

SEE ALSO:

[Salesforce Help: Test Your Custom Domains in a Sandbox \(can be outdated or unavailable during release preview\)](#)

## Test Your Site's Custom Domain That Uses a Third-Party CDN

Before you enable a custom domain that uses a third-party Content Delivery Network (CDN) to serve your Experience Cloud site, test it in a sandbox.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) served by a custom domain and accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

[Test Your Custom Domain That Uses a Third-Party CDN in a Sandbox](#)

## Security and Sharing

Understand the new permission structure for fields that secure personal information, use single sign-on with Microsoft credentials, and check out security changes for your guest users.

IN THIS SECTION:

[Restore Access with More Granular Personal Information Fields Permission](#)

To ensure that the appropriate Experience Cloud site users can access personal information in Summer '22, assign those users the View Concealed Field Data permission.

[Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions \(Release Update\)](#)

To improve the security of your data, Salesforce is removing guest user assignments from permission sets and permission set groups associated with permission set licenses that contain View All, Modify All, edit, and delete standard object permissions. The only standard object permissions allowed for guest users are read and create. You can no longer assign guest users permission sets or permission set groups that are associated with these permission set licenses that contain the restricted permissions. This update was first available in Spring '22.

[Set Up Single Sign-On with Microsoft Credentials](#)

Improve your customers' login experience by configuring a Microsoft authentication provider. Your customers can log in to Salesforce orgs and Experience Cloud sites with Microsoft credentials.

[Public Can Access Site Option Has a New Name](#)

The **Public can access site** general setting in Experience Builder is now called **Guest users can see and interact without logging in**. The new wording helps clarify that guest users have access only to the site's user interface.

[Require Granular Flow Permissions for Experience Cloud Guest Users \(Release Update\)](#)

In Winter '22 we discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. The change improves site security by requiring explicit guest user permissions to run flows. Without the Run Flows permission, you're free to use the more granular permission structure embedded in Flows and give your users the detailed access they need. Run Flows will be removed from the Guest User profile in all orgs in Spring '23. To avoid future access issues, we recommend updating your sites to the new permission structure before Spring '23. This update was first available in Summer '22.

### [Add Enhanced Protection to Visualforce Sites](#)

Help your site users safely interact with external websites and content in Visualforce sites. Three new options allow you to secure external access to and from your custom Visualforce pages.

### [Upgrade Your SAML Framework \(Release Update\)](#)

As part of regular maintenance, Salesforce is upgrading its SAML single sign-on (SSO) framework for orgs and Experience Cloud sites. This update can impact SAML SSO integrations with third-party systems, such as third-party identity providers or SAML-enabled applications. To avoid disruptions, apply this release update.

## Restore Access with More Granular Personal Information Fields Permission

To ensure that the appropriate Experience Cloud site users can access personal information in Summer '22, assign those users the View Concealed Field Data permission.

**Where:** This change applies to [Aura, LWR, and Visualforce sites](#) in Enterprise, Performance, Unlimited, and Developer editions. The View Concealed Field Data interface is accessed through Lightning Experience.

**How:** Admins can provide access by giving users the View Concealed Field Data permission using a permission set.

SEE ALSO:

[Preserve User Access to Personal Information Fields](#)

## Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions (Release Update)

To improve the security of your data, Salesforce is removing guest user assignments from permission sets and permission set groups associated with permission set licenses that contain View All, Modify All, edit, and delete standard object permissions. The only standard object permissions allowed for guest users are read and create. You can no longer assign guest users permission sets or permission set groups that are associated with these permission set licenses that contain the restricted permissions. This update was first available in Spring '22.



**Note:** This update originally was called Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users. We changed the update to remove guest user assignments of permission sets and permission set groups that are associated with permission set licenses that contain the restricted permissions. This removal of permission set and permission set group assignments is instead of removing assignments of the **permission set licenses** themselves. **Permission set license assignments** aren't removed automatically from guest users, but we encourage you to remove them yourself as a security best practice.

For more information on permission sets vs permission set licenses, see [What Are Permission Set Licenses?](#) in Salesforce Help.

**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 or permission set groups associated with permission set licenses that contain View All, Modify All, edit, and delete standard object permissions. In Winter '23, Salesforce enforces this update and removes the affected permission set and permission set group assignments 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 granted object permissions not required for their business needs.

**How:** Customizations, such as workflows, that rely on guest users being granted these object permissions can be affected after this change. To prevent disruptions in functionality, we recommend that you review and remove overly permissive permission sets, permission

set groups, and licenses 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 Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

## Set Up Single Sign-On with Microsoft Credentials

Improve your customers' login experience by configuring a Microsoft authentication provider. Your customers can log in to Salesforce orgs and Experience Cloud sites with Microsoft credentials.

**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:

[Login Enhancements for Microsoft](#)

## Public Can Access Site Option Has a New Name

The **Public can access site** general setting in Experience Builder is now called **Guest users can see and interact without logging in**. The new wording helps clarify that guest users have access only to the site's user interface.

**Where:** This change applies to [LWR and Aura sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To give guest users API access in Aura sites, select the Workspaces Administration preference **Give guest users access to public Chatter API requests**. To give guest users API access in LWR sites, select the Workspaces Administration preference **Allow guest users to access public APIs**.

## Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

In Winter '22 we discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. The change improves site security by requiring explicit guest user permissions to run flows. Without the Run Flows permission, you're free to use the more granular permission structure embedded in Flows and give your users the detailed access they need. Run Flows will be removed from the Guest User profile in all orgs in Spring '23. To avoid future access issues, we recommend updating your sites to the new permission structure before Spring '23. This update was first available in Summer '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:** 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.

## Add Enhanced Protection to Visualforce Sites

Help your site users safely interact with external websites and content in Visualforce sites. Three new options allow you to secure external access to and from your custom Visualforce pages.

**Where:** This change applies to [Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Apply Your Content Security Policy \(CSP\) to Visualforce Pages](#)

[Protect Your Visualforce Pages with Cross-Origin Opener Policy \(COOP\)](#)

[Restrict Page Resource Requests with Cross-Origin Embedder Policy \(COEP\)](#)

## Upgrade Your SAML Framework (Release Update)

As part of regular maintenance, Salesforce is upgrading its SAML single sign-on (SSO) framework for orgs and Experience Cloud sites. This update can impact SAML SSO integrations with third-party systems, such as third-party identity providers or SAML-enabled applications. To avoid disruptions, apply this release update.

**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:

[Upgrade SAML Single Sign-On Framework \(Release Update\)](#)

## Other Changes

Learn about additional changes that improve Experience Cloud.

IN THIS SECTION:

[Do More with Mobile Publisher for Experience Cloud](#)

Two new preconfigured tabs—Home and User Settings—along with a hamburger menu and a back button make it easier than ever for your users to navigate your Experience Cloud mobile apps. And with the Mobile Publisher App Update component, you can help users update their app version so that your apps continue working when enhanced domains are enabled in your org.

[Access Full CMS Functionality as an Experience Cloud Customer](#)

Customers with Experience Cloud licenses can now access all the features included in Salesforce CMS, without the need to purchase add-on functionality. Use features like the Microsite LWR site template, content publication scheduling, creating content types and items, and previewing headless content on a site.

[File Previews Limited to First 500 Pages](#)

To improve performance when generating file previews, we're limiting previews to the first 500 pages of a document.

[HTML Tags in Chatter Feeds Are Changing](#)

In Chatter feeds, the HTML tags `b` and `i` are no longer supported. Your feed now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

## Do More with Mobile Publisher for Experience Cloud

Two new preconfigured tabs—Home and User Settings—along with a hamburger menu and a back button make it easier than ever for your users to navigate your Experience Cloud mobile apps. And with the Mobile Publisher App Update component, you can help users update their app version so that your apps continue working when enhanced domains are enabled in your org.

**Where:** This change applies to apps created with Mobile Publisher for your Experience Cloud [Aura sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Force Experience Cloud App Users to Update for Enhanced Domains](#)

[Bottom Tab Bar Navigation Is Visible by Default](#)

[Make Navigation Easy for Your Users](#)

## Access Full CMS Functionality as an Experience Cloud Customer

Customers with Experience Cloud licenses can now access all the features included in Salesforce CMS, without the need to purchase add-on functionality. Use features like the Microsite LWR site template, content publication scheduling, creating content types and items, and previewing headless content on a site.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

## File Previews Limited to First 500 Pages

To improve performance when generating file previews, we're limiting previews to the first 500 pages of a document.

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

## HTML Tags in Chatter Feeds Are Changing

In Chatter feeds, the HTML tags `b` and `i` are no longer supported. Your feed now converts `b` tags to `strong` and `i` tags to `em` for screen reader accessibility.

**Where:** This change applies to Lightning Experience, and [Aura and Visualforce sites](#) accessed through Lightning Experience and Salesforce Classic, in Enterprise, Performance, Unlimited, and Developer editions.

## Field Service

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Enhanced Scheduling and Optimization helps you get your schedule in top shape with improved scheduling and travel time predictions, and the flexibility to select which territories use Enhanced Optimization. Troubleshoot work order generation issues with new status messages that help you take the next steps. Customers can stay COVID-safe by using their own devices to sign service reports. The Field Service mobile app keeps work running smoothly with automatic status changes, limited location tracking, and an all-in-one view of appointments, work orders, and absences for mobile workers.

**IN THIS SECTION:**[Field Service Resource Management](#)

Roll out Enhanced Scheduling and Optimization across your service territories. You can better predict travel times, run smarter scheduled jobs, examine the impact of optimization, and get recommendations on how to improve scheduling. Manage holiday hours and flexible break times for your team. Free up availability by tweaking appointment times and letting scheduling slide appointments around. Manage appointment bundles more easily by keeping field values in sync.

[Field Service Asset Management](#)

Resolve work order generation errors with improved Chatter messages. Use paths to streamline the approval process of service contracts. Add an address to your assets to track their location. Use ISVForce to manage assets. Apply discounts to service contracts to give customers higher discounts. Migrate from frequency fields to maintenance work rules.

[Field Service Customer Engagement](#)

Leverage Appointment Assistant's new component and enjoy improvements to existing components. Get more out of Visual Remote Assistant.

[Field Service Mobile](#)

Keep the back office informed with automatic status changes. Comply with regulations by limiting the tracking of your mobile workers' location. Get the big picture in one place with a unified view of your schedule. Show or hide the map to free up space in the app. Save time with fewer flow steps.

[Spotlight on Field Service Content](#)

Watch videos about our new Field Service features.

## Field Service Resource Management

Roll out Enhanced Scheduling and Optimization across your service territories. You can better predict travel times, run smarter scheduled jobs, examine the impact of optimization, and get recommendations on how to improve scheduling. Manage holiday hours and flexible break times for your team. Free up availability by tweaking appointment times and letting scheduling slide appointments around. Manage appointment bundles more easily by keeping field values in sync.

**IN THIS SECTION:**[Enhanced Scheduling and Optimization](#)

Benefit from advanced features and improved schedule quality by using Enhanced Scheduling and Optimization. Decide which territories use the new engine. Create scheduled jobs for service territory groups. Enhance predictive travel by using travel modes. Use Service Appointment Sliding to schedule more appointments within your resources' availability. Consider flexible breaks and holidays when you schedule, and gain insights and recommendations on service appointment scheduling. Examine optimization improvements in a unified hub.

[Appointment Bundling](#)

Enable Live Bundling to keep your bundles up to date. Use propagation policies to align the bundle members with the bundle. See your automated bundling requests in Optimization Requests. Keep your service appointments scheduled on the Gantt when your bundles meet the criteria. Use formula fields in your policies. Get meaningful error messages to solve issues in the system.

[Automate More With Shift Templates](#)

Shifts created by using the New from Pattern and New from Template actions now copy more fields from the shift's template to the shift. For example, values for the name, background color, and whether the shift is non-standard are set automatically. The resulting shift's Time Slot Type is set to Normal unless the shift template is marked Extended.

### [Use the Guest User Permission Set License](#)

Assign the new Field Service Guest User permission set license to your guest user profile. Guest users can have limited access to field service records so that they can perform tasks such as scheduling their own appointments. Salesforce is improving guest user security, and the new license replaces the Field Service Standard permission set license for guest users.

## Enhanced Scheduling and Optimization

Benefit from advanced features and improved schedule quality by using Enhanced Scheduling and Optimization. Decide which territories use the new engine. Create scheduled jobs for service territory groups. Enhance predictive travel by using travel modes. Use Service Appointment Sliding to schedule more appointments within your resources' availability. Consider flexible breaks and holidays when you schedule, and gain insights and recommendations on service appointment scheduling. Examine optimization improvements in a unified hub.

### IN THIS SECTION:

#### [Boost Your Scheduling and Optimization Experience](#)

Enhanced Scheduling and Optimization is gradually replacing the existing optimization functionality and associated manual and semiautomatic scheduling services. The new architecture and services provide a more efficient platform with improved scalability, performance, and schedule quality. You can select to use the new engine which includes innovative capabilities such as Travel Modes, Service Appointment Sliding, Flexible Breaks, Scheduled Jobs, Holiday Management, Appointment Insights (Beta), and Optimization Hub (Beta).

#### [Use Enhanced Scheduling and Optimization Only on Selected Territories](#)

Switch your territories that have simpler scheduling scenarios to Enhanced Scheduling and Optimization now, and move the more complex scenarios to it later when all service territory features are supported. This gradual rollout reduces risk and gives focused support to territories where the new functionality is available.

#### [Create Scheduled Jobs with More Capabilities](#)

Set up scheduled jobs that run separately for defined groups of service territories to better manage the volume of your optimization runs. That way you get more control over when and how often the job runs. These enhancements are available only for scheduled jobs using Enhanced Scheduling and Optimization.

#### [Get More Accurate Travel Time Predictions with Travel Modes](#)

Use travel modes to enhance predictive travel accuracy and improve the completion rate of service appointments. Define the travel mode per territory, per primary service territory member, or both, to take into account the transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations. Travel modes are applied only to those territories where Enhanced Scheduling and Optimization is enabled.

#### [Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments](#)

Free up time for more service appointments when using appointment booking and scheduling operations by enabling service appointment sliding. Service appointments on the Gantt can move to an earlier or later time, within the resource's availability. Sliding provides more timeslot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces. Service appointment sliding is available only with Enhanced Scheduling and Optimization.

#### [Schedule Multiple Flexible Breaks with Enhanced Work Rules](#)

Add up to three breaks to your work rules so that service resources get their meals and breaks on time. At the start of the day, the system calculates the break times relative to the worker's available hours. Use work rule entries to add the break duration and a time window to availability-based work rules. Then scheduling can optimize your appointments and break times.

#### [Account for Holiday Closures](#)

Refine your working hours and show holidays in the dispatcher console. Update operating hours so that service appointments aren't scheduled on holidays. You can override holidays to schedule workers as needed by creating holiday shifts.

### [Explore the Impact of Optimization with Optimization Hub \(Beta\)](#)

View the improvements that optimization makes across multiple territories in one unified hub. For example, track the improvement of resource utilization, response time, and travel time.

### [Get Scheduling Recommendations with Appointment Insights \(Beta\)](#)

Understand why service appointments can't be scheduled, and what changes you can make to qualify more time slots and candidates for scheduling. For example, consider removing a custom rule that prevents their scheduling.

### [Scale Optimization Requests](#)

The maximum number of appointments that you can schedule and optimize is now relative to the number of Field Service Scheduling licenses. The limit is 200 per user license, or 50,000, whichever is greater. When you run scheduling and optimization processes, the system checks whether the limit has been reached within the past 24 hours. To see your maximum and the current request count, go to Company Information in setup.

## Boost Your Scheduling and Optimization Experience

Enhanced Scheduling and Optimization is gradually replacing the existing optimization functionality and associated manual and semiautomatic scheduling services. The new architecture and services provide a more efficient platform with improved scalability, performance, and schedule quality. You can select to use the new engine which includes innovative capabilities such as Travel Modes, Service Appointment Sliding, Flexible Breaks, Scheduled Jobs, Holiday Management, Appointment Insights (Beta), and Optimization Hub (Beta).

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** From Setup, in the Quick Find box, enter *Field Service*, and then select **Field Service Settings**. Select **Field Service Integration** and **Field Service Enhanced Scheduling and Optimization** and save.



SEE ALSO:

[Salesforce Help: Get Ready for Enhanced Scheduling and Optimization](#) (can be outdated or unavailable during release preview)

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

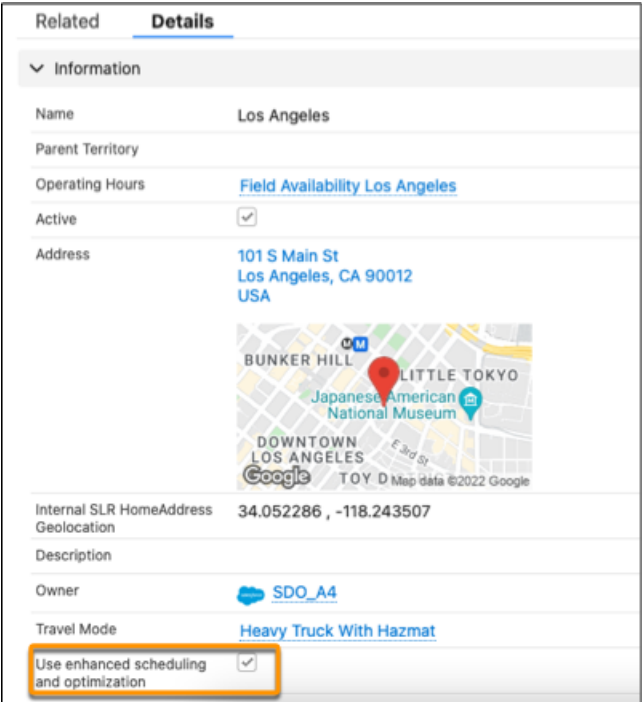
[Salesforce Video: Enhanced Scheduling and Optimization](#)


## Use Enhanced Scheduling and Optimization Only on Selected Territories

Switch your territories that have simpler scheduling scenarios to Enhanced Scheduling and Optimization now, and move the more complex scenarios to it later when all service territory features are supported. This gradual rollout reduces risk and gives focused support to territories where the new functionality is available.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Add the **Use enhanced scheduling and optimization** field to the FSL Service Territory Layout page layout. From the Service Territories tab, click the service territory name that you want to enable enhanced scheduling and optimization for, and then select **Use enhanced scheduling and optimization**.



Related		Details
Information		
Name	Los Angeles	
Parent Territory		
Operating Hours	<a href="#">Field Availability Los Angeles</a>	
Active	<input checked="" type="checkbox"/>	
Address	101 S Main St Los Angeles, CA 90012 USA	
		
Internal SLR HomeAddress Geolocation	34.052286, -118.243507	
Description		
Owner	SDO_A4	
Travel Mode	<a href="#">Heavy Truck With Hazmat</a>	
Use enhanced scheduling and optimization	<input checked="" type="checkbox"/>	

SEE ALSO:

[Salesforce Help: Set Up Enhanced Optimization per Territory](#) (can be outdated or unavailable during release preview)

## Create Scheduled Jobs with More Capabilities

Set up scheduled jobs that run separately for defined groups of service territories to better manage the volume of your optimization runs. That way you get more control over when and how often the job runs. These enhancements are available only for scheduled jobs using Enhanced Scheduling and Optimization.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. In the required service territories, select **Use enhanced scheduling and optimization**. To create a new job, in Field Service Settings, go to Scheduled Jobs under Optimization and click **New Job**. For Automator Type, select **Enhanced Optimization**.

The screenshot shows the 'Optimization' configuration page. At the top, there are tabs for 'ACTIVATION', 'LOGIC', 'SCHEDULED JOBS', and 'ADVANCED PARAMETERS'. Under 'SCHEDULED JOBS', there are buttons for 'New Job' and 'Edit'. Below this, a list of optimization jobs is shown. The first job is 'ng1' and is inactive. The second job is 'Optimization' and is active, with a green toggle switch and 'Enhanced' scheduling. This job is highlighted with an orange border. Below the job list, the 'Enhanced Optimization' configuration is shown. It has tabs for 'General', 'Territory', and 'Schedule'. The 'General' tab is selected, showing 'Time Periods' (From Day 1 to Day 1, From Day 2 to Day 2), 'Scheduling Policy' (Customer First), 'Filter by Criteria' (None), and 'Notification Recipient'.

SEE ALSO:

[Salesforce Help: Set Up and Run Enhanced Optimization Jobs \(can be outdated or unavailable during release preview\)](#)

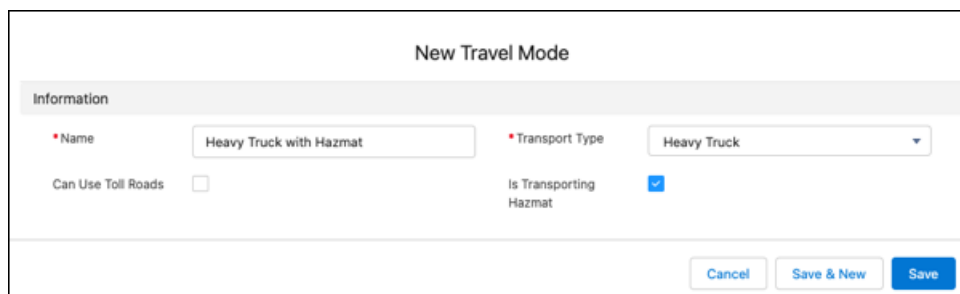
[Release Note: Use Enhanced Scheduling and Optimization Only on Selected Territories](#)

## Get More Accurate Travel Time Predictions with Travel Modes

Use travel modes to enhance predictive travel accuracy and improve the completion rate of service appointments. Define the travel mode per territory, per primary service territory member, or both, to take into account the transportation type (car, light truck, heavy truck, bicycle, or walking), the use of toll roads, and hazmat considerations. Travel modes are applied only to those territories where Enhanced Scheduling and Optimization is enabled.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Add the **Travel Modes** field to the Service Territory or Service Territory Member page layout. Then, from the Travel Modes tab, click **New** and configure your travel mode settings, and then save.



**New Travel Mode**

Information

Name: Heavy Truck with Hazmat

Transport Type: Heavy Truck

Can Use Toll Roads: ☐

Is Transporting Hazmat: ☒

Cancel Save & New Save

**SEE ALSO:**

[Salesforce Help: Set Up Travel Modes \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Travel Modes](#)

## Improve Resource Utilization and Scheduling Quality by Sliding Service Appointments

Free up time for more service appointments when using appointment booking and scheduling operations by enabling service appointment sliding. Service appointments on the Gantt can move to an earlier or later time, within the resource's availability. Sliding provides more timeslot availability and faster SLA compliance and enables the scheduling of longer service appointments by reducing white spaces. Service appointment sliding is available only with Enhanced Scheduling and Optimization.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Select **Scheduling > General Logic**, and then select **Enable service appointment sliding**.

**SEE ALSO:**

[Salesforce Help: Enable Service Appointment Sliding \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Service Appointment Sliding](#)

## Schedule Multiple Flexible Breaks with Enhanced Work Rules

Add up to three breaks to your work rules so that service resources get their meals and breaks on time. At the start of the day, the system calculates the break times relative to the worker's available hours. Use work rule entries to add the break duration and a time window to availability-based work rules. Then scheduling can optimize your appointments and break times.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Open work rules of the Service Resource Availability type and add a work rule entry for each break.

The screenshot displays the 'Edit WRE-0002' modal in Salesforce. The modal is titled 'Edit WRE-0002' and has a 'mode=Edit, version=RRH' indicator. It is divided into two main sections: 'Flexible Break Schedule' and 'System Information'. The 'Flexible Break Schedule' section contains three input fields: 'Earliest Break Start (minutes)' with a value of 360, 'Latest Break End (minutes)' with a value of 420, and 'Break Duration (minutes)' with a value of 15. The 'System Information' section shows 'Last Modified By' as 'User User, 4/11/2022 4:27 PM'. At the bottom of the modal are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows a sidebar with 'Related' and 'Details' tabs, and a list of 'Work Rule Entries' including WRE-0000, WRE-0001, and WRE-0002.

SEE ALSO:

[Salesforce Help: Work Rule Type: Service Resource Availability](#)

[Salesforce Help: Work Rule Entries](#)

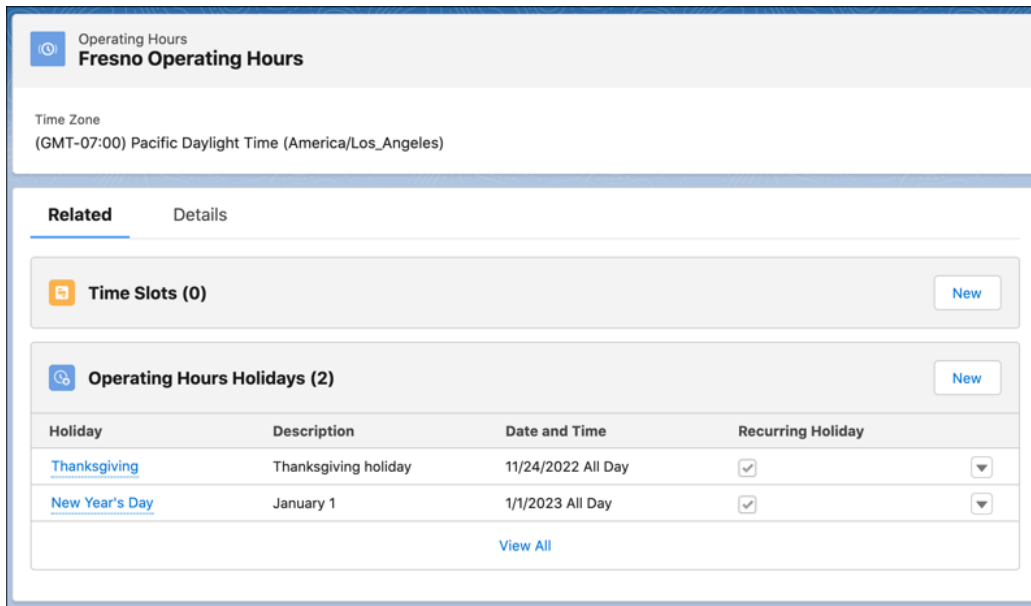
[Salesforce Video: Flexible Breaks](#)

## Account for Holiday Closures

Refine your working hours and show holidays in the dispatcher console. Update operating hours so that service appointments aren't scheduled on holidays. You can override holidays to schedule workers as needed by creating holiday shifts.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**How:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. Create holidays in Setup, and then add them to your operating hours. To add availability during holidays, select the **Holiday** field on a shift. Make sure you enable Enhanced Scheduling and Optimization for each service territory.



SEE ALSO:

*Salesforce Help: Add Holidays to Operating Hours*

*Salesforce Help: Set Up Support Holidays*

*Salesforce Video: Holiday Management (Summer '22)*

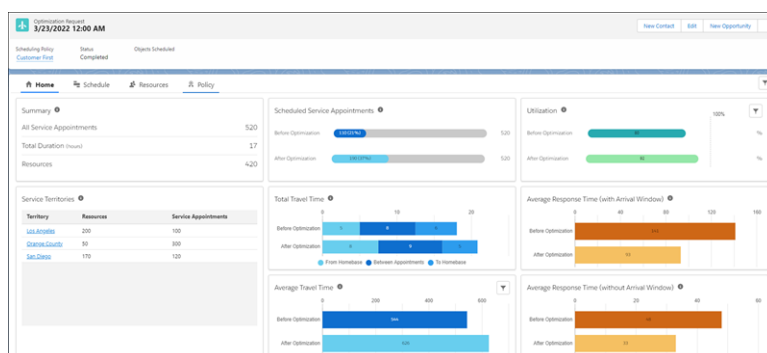
## Explore the Impact of Optimization with Optimization Hub (Beta)

View the improvements that optimization makes across multiple territories in one unified hub. For example, track the improvement of resource utilization, response time, and travel time.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

 **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:** Turn on **Optimization Insights** and **Enhanced Scheduling and Optimization** in Field Service Settings. From Optimization Requests in the Object Manager, use Lightning App Builder to add the Optimization Hub Lightning web component to the optimization request record page.



SEE ALSO:

[Salesforce Help: Explore Metrics in Optimization Hub \(Beta\)](#) (can be outdated or unavailable during release preview)

## Get Scheduling Recommendations with Appointment Insights (Beta)

Understand why service appointments can't be scheduled, and what changes you can make to qualify more time slots and candidates for scheduling. For example, consider removing a custom rule that prevents their scheduling.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.



**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:** Turn on **Enhanced Scheduling and Optimization** in Field Service Settings. From Service Appointments in the Object Manager, use Lightning App Builder to add the Appointment Insights Lightning web component to the service appointment record page.

SEE ALSO:

[Salesforce Help: Get Scheduling Recommendations with Appointment Insights \(Beta\)](#) (can be outdated or unavailable during release preview)

## Scale Optimization Requests

The maximum number of appointments that you can schedule and optimize is now relative to the number of Field Service Scheduling licenses. The limit is 200 per user license, or 50,000, whichever is greater. When you run scheduling and optimization processes, the system checks whether the limit has been reached within the past 24 hours. To see your maximum and the current request count, go to Company Information in setup.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

**Why:** Previously, Salesforce set a maximum of 50,000 requests a day. The scaled limit helps keep the optimization service running at peak performance. The new limit applies only if Enhanced Scheduling and Optimization is turned on.

SEE ALSO:

[Salesforce Help: Field Service Limits and Limitations](#)

## Appointment Bundling

Enable Live Bundling to keep your bundles up to date. Use propagation policies to align the bundle members with the bundle. See your automated bundling requests in Optimization Requests. Keep your service appointments scheduled on the Gantt when your bundles meet the criteria. Use formula fields in your policies. Get meaningful error messages to solve issues in the system.

IN THIS SECTION:

### [Keep Your Bundles Up to Date](#)

Let Field Service update your bundles when service appointments are modified or added to your appointment list.

### [Align the Properties of the Bundle Members with the Bundle](#)

Use propagation policies to determine when and how the bundle updates the fields of the bundle members. For example, configure the Description field so that it's updated in all the bundle members when they're added to the bundle.

### [Keep an Eye on Your Automatic Bundling Requests](#)

To see the status of your automated bundling requests, click the lightbulb in the Dispatcher Console or go to the Optimization Requests tab.

### [Save the Hassle of Scheduling When You Create a Bundle](#)

When you bundle scheduled service appointments that are assigned to the same resource on the same day, the bundle is now scheduled on the Gantt. If any of the selected service appointments aren't scheduled, aren't assigned to the same resource, or aren't on the same day, the created bundle isn't scheduled.

### [Enhance Appointment Bundling with Formula Fields](#)

Use formula fields in your Appointment Bundling policies. For example, to mark a bundle as Emergency if one of its members is urgent, create a formula field that marks a service appointment as High Attention if its due date is today. Then, create an aggregation policy to mark the bundle as Emergency if one of its members is marked as High Attention.

### [Get Meaningful Messages for Appointment Bundling](#)

See error messages in the Dispatcher Console that the Salesforce admin can use for solving issues in the system.

## Keep Your Bundles Up to Date

Let Field Service update your bundles when service appointments are modified or added to your appointment list.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

**How:** To enable Live Bundling, from Field Service Settings, go to Bundling under Scheduling.

**Scheduling**

GENERAL LOGIC SCHEDULING POLICIES DYNAMIC GANTT ROUTING **BUNDLING**

Service appointment bundles are active.

**Automated Bundling** OFF  
Schedule the bundling process during low-activity times.

Day of week Day of month  
☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat  
 Hour Minute  
 23 0 Apply

**Live Bundling** ON  
Automatically updates bundles when service appointments are modified, deleted, or added to your appointment list.

Bundle Update Frequency (in minutes) 10 Apply

SEE ALSO:

[Salesforce Help: Set Up Automatic Bundling \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: What's New: Appointment Bundling](#)

## Align the Properties of the Bundle Members with the Bundle

Use propagation policies to determine when and how the bundle updates the fields of the bundle members. For example, configure the Description field so that it's updated in all the bundle members when they're added to the bundle.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Appointment Bundling enabled.

**How:** Fill in an Appointment Bundle Propagation Policy for each field that you want to propagate from the bundle service appointment to the bundle member service appointments.

**New Appointment Bundle Propagation Policy**

**Information**

\* Name ? Policy 1

\* Bundle Policy ? Test

Update on Add ? ☒

Update on Remove ? ☒

Update on Unbundle ? ☒

**Propagation Settings**

Bundle Field Name ? Actual Duration (Minutes)

Bundle Member Field Name ? Actual Duration (Minutes)

Constant Value ?

Additional Constant Value ?

Add Constant Value ? ☐



## SEE ALSO:

[Salesforce Help: Create an Appointment Bundle Propagation Policy \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: What's New: Appointment Bundling](#)

## Keep an Eye on Your Automatic Bundling Requests

To see the status of your automated bundling requests, click the lightbulb in the Dispatcher Console or go to the Optimization Requests tab.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

**How:** From Optimization Requests in the Object Manager, activate the Automated Bundling type. If you're upgrading Field Service from a previous version, create the Automated Bundling type.

## SEE ALSO:

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

[Salesforce Help: Set Up Automatic Bundling \(can be outdated or unavailable during release preview\)](#)

## Save the Hassle of Scheduling When You Create a Bundle

When you bundle scheduled service appointments that are assigned to the same resource on the same day, the bundle is now scheduled on the Gantt. If any of the selected service appointments aren't scheduled, aren't assigned to the same resource, or aren't on the same day, the created bundle isn't scheduled.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

## SEE ALSO:

[Salesforce Help: Create a Bundle Manually \(can be outdated or unavailable during release preview\)](#)

## Enhance Appointment Bundling with Formula Fields

Use formula fields in your Appointment Bundling policies. For example, to mark a bundle as Emergency if one of its members is urgent, create a formula field that marks a service appointment as High Attention if its due date is today. Then, create an aggregation policy to mark the bundle as Emergency if one of its members is marked as High Attention.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

## Get Meaningful Messages for Appointment Bundling

See error messages in the Dispatcher Console that the Salesforce admin can use for solving issues in the system.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed and Appointment Bundling enabled.

## Automate More With Shift Templates

Shifts created by using the New from Pattern and New from Template actions now copy more fields from the shift's template to the shift. For example, values for the name, background color, and whether the shift is non-standard are set automatically. The resulting shift's Time Slot Type is set to Normal unless the shift template is marked Extended.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Create Shifts from a Pattern](#)

## Use the Guest User Permission Set License

Assign the new Field Service Guest User permission set license to your guest user profile. Guest users can have limited access to field service records so that they can perform tasks such as scheduling their own appointments. Salesforce is improving guest user security, and the new license replaces the Field Service Standard permission set license for guest users.

**Where:** This feature is available in Lightning Experience, Salesforce Classic, and mobile in Enterprise, Unlimited, and Developer editions.

**When:** Starting in Spring '22, you can no longer assign guest users permission sets or permission set groups associated with permission set licenses that contain View All, Modify All, edit, and delete standard object permissions. In Winter '23, Salesforce enforces this update and removes the affected permission set and permission set group assignments from guest users.

**How:** To get ready for the changes, you can clone existing permission sets assigned to guest users and remove the disallowed permissions. Then assign the cloned permission set.

SEE ALSO:

[Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions \(Release Update\)](#)

[Salesforce Help: Guest User Security Policies and Timelines](#)

[Salesforce Help: Field Service Permission Set Licenses](#)

## Field Service Asset Management

Resolve work order generation errors with improved Chatter messages. Use paths to streamline the approval process of service contracts. Add an address to your assets to track their location. Use ISVForce to manage assets. Apply discounts to service contracts to give customers higher discounts. Migrate from frequency fields to maintenance work rules.

IN THIS SECTION:

[Gain Insight into Work Order Generation Status](#)

Improved Chatter messages make it easier to identify problems and solutions if work order generation results in error.

[Guide Users with Paths for Service Contracts](#)

Simplify the service contracts approval process by creating paths that guide users through the process, from draft to completion.

[Pinpoint the Location of Your Assets and Service Appointments](#)

Add an address to capture the location of your assets. Additionally, service appointments created from work orders inherit the address from the work order, making it easier for drivers to get to customers.

[Get More Value from OEM with Assets](#)

ISVForce users with a Salesforce Platform license can now update assets to get even more value from the Salesforce OEM environment.

### [Give Customers Higher Discounts on Service Contracts](#)

Add a total discount to your service contracts on top of the discounts available for each service contract line item so that your customers enjoy a higher discount.

### [Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules \(Release Update\)](#)

The Frequency and Frequency Type fields on the Maintenance Plan begin their phased retirement in Summer'22. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first made available in Summer '22.

## Gain Insight into Work Order Generation Status

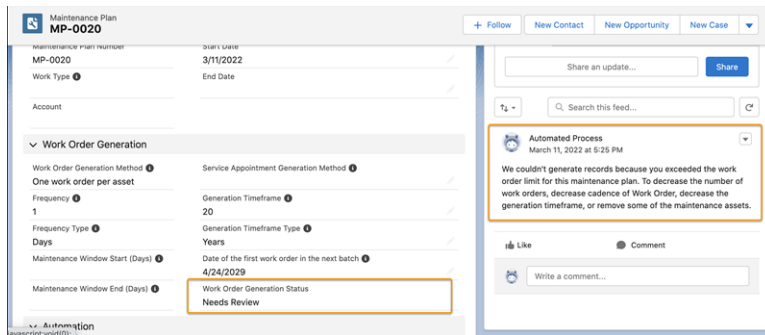
Improved Chatter messages make it easier to identify problems and solutions if work order generation results in error.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**How:** In addition to the existing Completed and Unsuccessful statuses, the Work Order Generation Status field on maintenance plans has two new statuses to help Salesforce administrators determine how to handle work order generation errors:

- **No Work Order Generated** indicates that based on the configuration, no work order was supposed to be created, so no action is required.
- **Needs Review** indicates that to continue the work order creation an action is required.

If the work order generation status is Unsuccessful or Needs Review, the reason for the failure appears in the Chatter feed.



SEE ALSO:

[Salesforce Help: Troubleshooting Work Order Generation \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: Work Order Generation Visibility](#)

## Guide Users with Paths for Service Contracts

Simplify the service contracts approval process by creating paths that guide users through the process, from draft to completion.

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

**How:** From Setup, in the Quick Find box, enter **Path Settings**, and then click **Enable**. Then create a path for the Service Contract object by entering basic information about each step of the path and activating the path.

SEE ALSO:

[Salesforce Help: Guide Users with Path \(can be outdated or unavailable during release preview\)](#)

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

## Pinpoint the Location of Your Assets and Service Appointments

Add an address to capture the location of your assets. Additionally, service appointments created from work orders inherit the address from the work order, making it easier for drivers to get to customers.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

**How:** From Setup, add the Address field to the Asset page layout.

## Get More Value from OEM with Assets

ISVForce users with a Salesforce Platform license can now update assets to get even more value from the Salesforce OEM environment.

**Who:** ISVForce users with a Salesforce Platform license.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

## Give Customers Higher Discounts on Service Contracts

Add a total discount to your service contracts on top of the discounts available for each service contract line item so that your customers enjoy a higher discount.

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

**How:** From Service Contracts in the Object Manager, add the Additional Discount field to the Service Contract page layout.

SEE ALSO:

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

## Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on the Maintenance Plan begin their phased retirement in Summer'22. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first made available in Summer '22.

**Where:** This feature is available in Lightning Experience and Salesforce Classic in Enterprise, 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.

**Why:** The Maintenance Plan Frequency and Frequency Type fields will not be accessible in the UX in Winter '23. Recent changes to Maintenance Work Rules replace and improve the functionality provided by those fields.

**How:** The Maintenance Plan Frequency and Frequency Type fields won't be accessible in Winter '23. Eventually, the Frequency and Frequency Type fields will be retired from the Maintenance Plan and impact the Work Order Generation.

For all impacted maintenance plans, select a Maintenance Plan that uses the Frequency fields without the Maintenance Work Rule, update the selected Maintenance Plan to use Maintenance Work Rules instead, and click Enable Test Run.

## Field Service Customer Engagement

Leverage Appointment Assistant's new component and enjoy improvements to existing components. Get more out of Visual Remote Assistant.

## IN THIS SECTION:

[Appointment Assistant](#)

Enhance Appointment Assistant by adding the Contactless Signature component, leveraging additions to the Real-Time Location component, and sending surveys to customers.

[Visual Remote Assistant](#)

Enhance Visual Remote Assistant by creating and refreshing sandbox accounts, better managing your account, and delivering instant support for your agents.

## Appointment Assistant

Enhance Appointment Assistant by adding the Contactless Signature component, leveraging additions to the Real-Time Location component, and sending surveys to customers.

## IN THIS SECTION:

[Let Customers Sign Reports on Their Personal Device](#)

Customers can now use their own device instead of the mobile worker's device to digitally sign service reports and stay COVID-safe.

[Get More from the Real-Time Location Component](#)

Mask or show the mobile worker's exact location on the Appointment Assistant map. Add a call button so customers can call the mobile worker directly. And use an Amazon Connect number instead of the mobile worker's personal number with Service Cloud Voice.

[See the Mobile Worker's Location Move Smoothly on the Map](#)

Appointment Assistant customers can now see their mobile worker's location move seamlessly on the Real-Time Location component's map. Worker locations are shown only when they're on the way to their next appointment.

[Hear What Customers Have to Say About Their Experience](#)

Send Salesforce Surveys to Appointment Assistant customers to give them a chance to share their feedback after an appointment. You can also choose to integrate with GetFeedback.

## Let Customers Sign Reports on Their Personal Device

Customers can now use their own device instead of the mobile worker's device to digitally sign service reports and stay COVID-safe.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package and Appointment Assistant installed.

**How:** Add Appointment Assistant's Contactless Signature component to your Experience Builder site. Then set up flows to send a link to the customer.

**Almost done...**


Review your documents, enter your name, and sign.

**Service Report**  
Jan 01 2021 • PDF

\* Full Name  
Jenny Smith

☐ Use my name as my signature

Signature

 Clear

Next

**SEE ALSO:**

[Salesforce Help: Set Up Appointment Assistant Contactless Signature](#) (can be outdated or unavailable during release preview)

[Salesforce Video: What's New: Appointment Assistant](#)

## Get More from the Real-Time Location Component

Mask or show the mobile worker's exact location on the Appointment Assistant map. Add a call button so customers can call the mobile worker directly. And use an Amazon Connect number instead of the mobile worker's personal number with Service Cloud Voice.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package and Appointment Assistant installed.

**How:** Set up the new options in Appointment Assistant's Real-Time Location component.

**Real-Time Location** ⌵ ✕

☒ Show time estimate

☒ Show map

☒ Show team member's info

☒ Show team member's image

☐ Show team member's exact location <sup>1</sup>

☐ Show Call button

Amazon Connect Phone Number <sup>1</sup>

URL for the Team Member's Marker <sup>1</sup>

URL for the Customer's Marker <sup>1</sup>

## SEE ALSO:

[Salesforce Help: Manage What Customers See \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: What's New: Appointment Assistant](#)

## See the Mobile Worker's Location Move Smoothly on the Map

Appointment Assistant customers can now see their mobile worker's location move seamlessly on the Real-Time Location component's map. Worker locations are shown only when they're on the way to their next appointment.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package and Appointment Assistant installed.

## SEE ALSO:

[Salesforce Video: What's New: Appointment Assistant](#)

## Hear What Customers Have to Say About Their Experience

Send Salesforce Surveys to Appointment Assistant customers to give them a chance to share their feedback after an appointment. You can also choose to integrate with GetFeedback.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package and Appointment Assistant installed.

## SEE ALSO:

[Salesforce Help: Set Up Surveys for Appointment Assistant \(can be outdated or unavailable during release preview\)](#)

[Salesforce Video: What's New: Appointment Assistant](#)

## Visual Remote Assistant

Enhance Visual Remote Assistant by creating and refreshing sandbox accounts, better managing your account, and delivering instant support for your agents.

## IN THIS SECTION:

### [Create and Refresh Sandbox Accounts](#)

Visual Remote Assistant maintains the configuration across your production and sandbox environments through sandbox refreshes and production deployments.

### [Manage Your Account](#)

Restore and reactivate your Visual Remote Assistant account instantly when you reinstall the Visual Remote Assistance package. Delete your data and account when you no longer need Visual Remote Assistant in a specific organization. All personally identifiable information (PII) data and visual assets (images & sessions recordings) are removed when you delete an account.

### [Deliver Instant Support for Your Agents](#)

Improve support as a System Administrator to your Visual Remote Assistant agents by logging in as an agent and conducting a Visual Remote Assistant session on their behalf. When you're logged in to troubleshoot, a Support Mode indicator appears on the Invite component.

### [Disable Image Storage](#)

In cases where end customer privacy calls for stricter measures, you can prevent images taken during sessions from being stored in the cloud.

## Create and Refresh Sandbox Accounts

Visual Remote Assistant maintains the configuration across your production and sandbox environments through sandbox refreshes and production deployments.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Manage Your Account

Restore and reactivate your Visual Remote Assistant account instantly when you reinstall the Visual Remote Assistance package. Delete your data and account when you no longer need Visual Remote Assistant in a specific organization. All personally identifiable information (PII) data and visual assets (images & sessions recordings) are removed when you delete an account.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Deliver Instant Support for Your Agents

Improve support as a System Administrator to your Visual Remote Assistant agents by logging in as an agent and conducting a Visual Remote Assistant session on their behalf. When you're logged in to troubleshoot, a Support Mode indicator appears on the Invite component.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Disable Image Storage

In cases where end customer privacy calls for stricter measures, you can prevent images taken during sessions from being stored in the cloud.

**Where:** This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

# Field Service Mobile

Keep the back office informed with automatic status changes. Comply with regulations by limiting the tracking of your mobile workers' location. Get the big picture in one place with a unified view of your schedule. Show or hide the map to free up space in the app. Save time with fewer flow steps.

### IN THIS SECTION:

#### [Make Appointment Status Changes Easier](#)

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, in the Timed mode, when the mobile worker is on the way to an appointment, the app shows a suggested change of status. The mobile worker can reject or update the status. If no action is taken, the status changes after a predefined time.

#### [Limit Mobile Workers' Location Tracking for Appointment Assistant](#)

Track the mobile worker's location only when they're on the way to their next service appointment. Limited location tracking is useful for companies that comply with strict regulations when monitoring their mobile workers' whereabouts.



### [Combine Work and Absence Schedules in the Mobile App \(Beta\)](#)

See the whole schedule at a glance with a unified view of resource absences, service appointments, and work orders. A new setting controls whether absences appear on the Schedule tab of the Field Service mobile app. Mobile workers get an integrated view without switching tabs. Desktop users don't see absences added to Service Appointment list views.

### [Show or Hide the Map](#)

Plot a course to success by seeing just the essential details on your work orders. Hide the map to free up screen space or open it to view the trip route.

### [Get Your Work Done with Fewer Flow Steps](#)

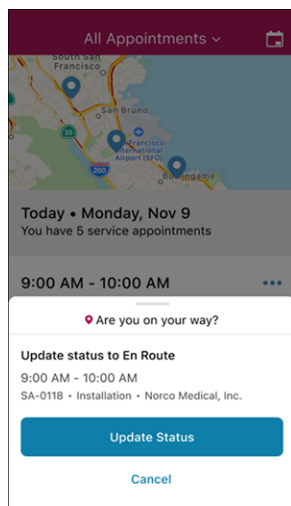
Flow completion screens are gone, saving you a step when waiting for your flow to finish. Instead, a popup notification lets you know when the flow finished successfully.

## Make Appointment Status Changes Easier

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, in the Timed mode, when the mobile worker is on the way to an appointment, the app shows a suggested change of status. The mobile worker can reject or update the status. If no action is taken, the status changes after a predefined time.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

**How:** In Field Service Mobile Settings, under Automatic Status Change, select the Manual, Timed, or Automatic mode, and then configure the settings.



SEE ALSO:

[Salesforce Help: Set Up Automatic Status Change \(can be outdated or unavailable during release preview\)](#)

## Limit Mobile Workers' Location Tracking for Appointment Assistant

Track the mobile worker's location only when they're on the way to their next service appointment. Limited location tracking is useful for companies that comply with strict regulations when monitoring their mobile workers' whereabouts.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

**How:** From Connected Apps, open Field Service for iOS or Field Service for Android. Create a new custom attribute with LIMITED\_TRACKING as the Attribute Key and "TRUE" as the Attribute Value.

## Combine Work and Absence Schedules in the Mobile App (Beta)

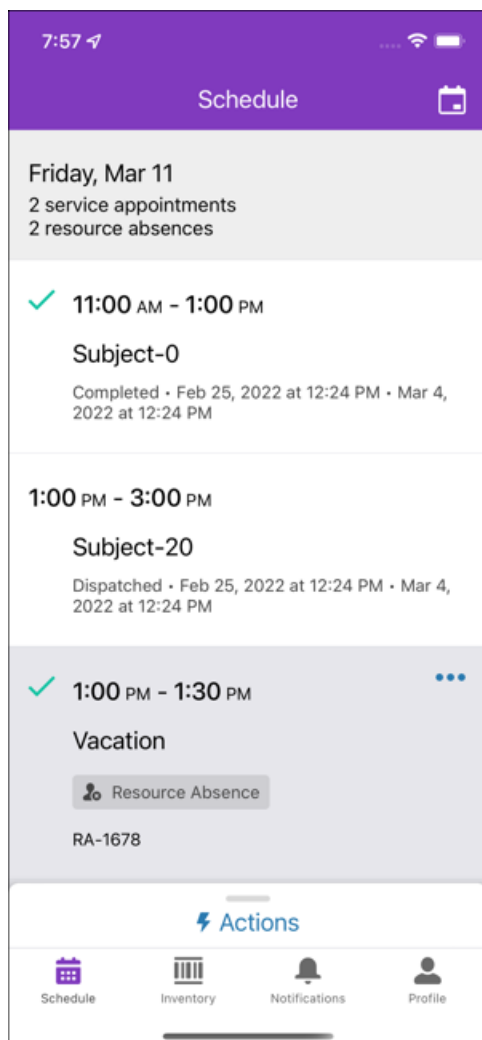
See the whole schedule at a glance with a unified view of resource absences, service appointments, and work orders. A new setting controls whether absences appear on the Schedule tab of the Field Service mobile app. Mobile workers get an integrated view without switching tabs. Desktop users don't see absences added to Service Appointment list views.



**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](#).

**Where:** This change applies to the Field Service mobile app for Android and iOS.

**How:** Turn on **Display resource absences in Schedule view (Beta)** on any Field Service mobile settings configuration.



SEE ALSO:


[Salesforce Help: Create Resource Absences in the Mobile App](#)

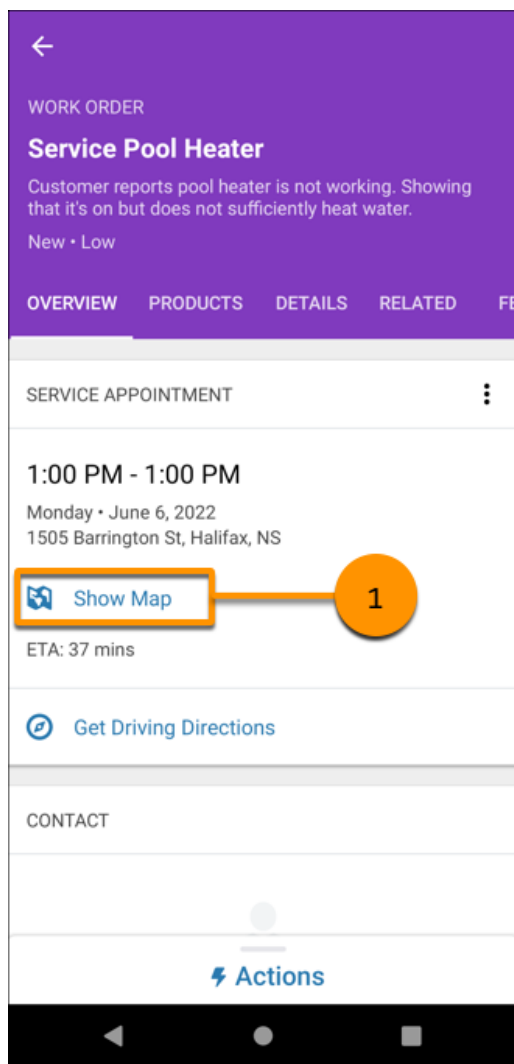
[Salesforce Help: Mobile Settings](#)

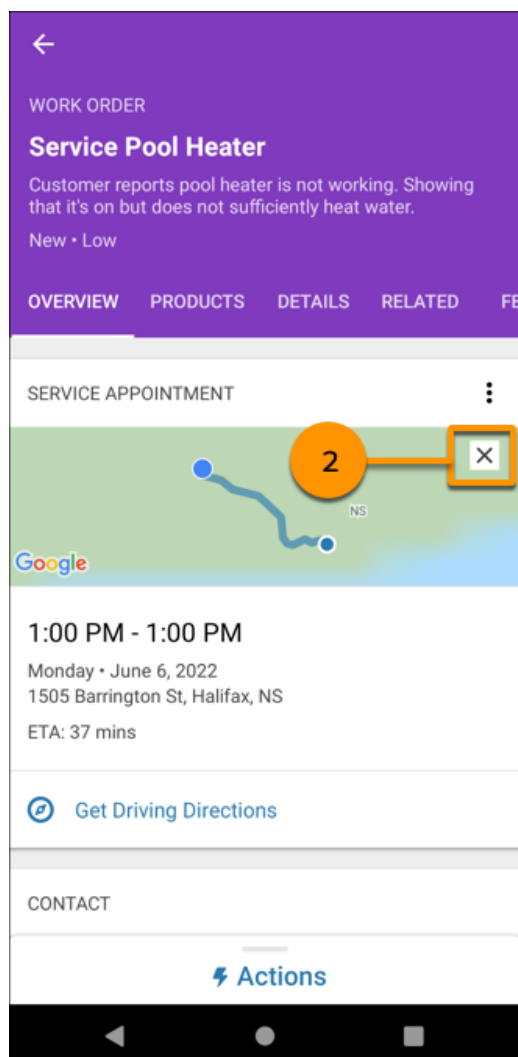
## Show or Hide the Map

Plot a course to success by seeing just the essential details on your work orders. Hide the map to free up screen space or open it to view the trip route.

**Where:** This change applies to the Field Service mobile app for Android and iOS.

**How:** Tap **Show Map** to open the map (1). Or tap the  icon to hide it (2).

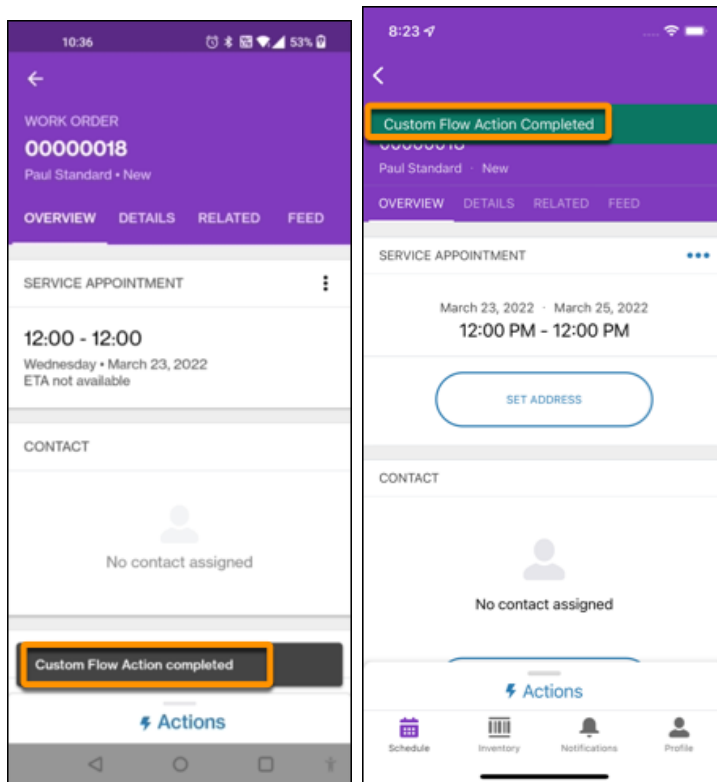




## Get Your Work Done with Fewer Flow Steps

Flow completion screens are gone, saving you a step when waiting for your flow to finish. Instead, a popup notification lets you know when the flow finished successfully.

**Where:** This change applies to the Field Service mobile app for Android and iOS.



## Spotlight on Field Service Content

Watch videos about our new Field Service features.

### IN THIS SECTION:





#### [Watch Videos](#)

New instructional videos help your users learn about new and improved Field Service features.

## Watch Videos

New instructional videos help your users learn about new and improved Field Service features.

- The [Enhanced Scheduling and Optimization](#) video shows how to optimize scheduling using the innovative new engine, built for greater scalability, precision, schedule quality, and performance alongside some new features such as Travel Modes, Holiday Management, and Service Appointment Sliding.
- The [Service Appointment Sliding](#) video shows how to free up time for a new service appointment when using appointment booking and scheduling operations by sliding service appointments on the Gantt to an earlier or later time, within the resource's availability.
- The [Travel Modes](#) video shows how to calculate accurate travel times when scheduling service appointments, based on transportation type, permission to use toll roads, and the presence of hazardous materials.
- The [Appointment Assistant](#) video shows the enhancements in the Real-Time Location component, the new Contactless Signature component that lets customers sign reports on their own device, and how to send surveys to your customers so they can give feedback about the service they received.

- The  [Appointment Bundling](#) video shows how Live Bundling keeps your bundles up to date and how to use propagation policies to pass down data from the bundle to its members.
- The  [Holiday Management](#) video shows how to add holidays to operating hours to reflect when your business is open.
- The  [Flexible Breaks](#) video shows how you can schedule multiple breaks within a work day. Ensure that break and meal times happen at the right time, relative to the start of the day.
- The  [Work Order Generation Visibility](#) video shows the improvements made to error messages to provide more visibility and clarity for the work order generation process.

## 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 our public cloud partners allows us to expand quickly and also helps us meet local data storage requirements. Hyperforce allows us to grow 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.

## 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.

**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, Singapore, and the United States. 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	CRM Analytics	CRM Analytics, previously called Tableau CRM, is a cloud-based platform for connecting data from multiple sources, creating interactive analytics on that data,	Australia, Brazil, Canada, France, Germany, India, Japan, Singapore, United States

Cloud	Product or Feature	Description	Available In
		and sharing those views in apps. CRM Analytics is a better way to distribute insight to business users so that they can understand and act on changing information.	

## Industries

Get started faster with Guided Setup support in several Industries clouds. Track your carbon footprint with Net Zero Cloud. Manufacturing Cloud helps leverage customer forecasts into business opportunities for you. Nurture relationships and run branches better with Financial Services Cloud. Health Cloud empowers care providers to support patients more closely and helps patients do more for themselves, while Loyalty Management brings you closer to your program partners and members with enhanced transaction journals and filters. Public Sector Cloud brings enhanced support for inspections, investigations, and health care plans.

### IN THIS SECTION:

#### [Consumer Goods Cloud](#)

Plan, run, monitor, and analyze your promotions with Trade Promotion Management. Set up promotional activities after you define your business and account plans in detail. You can either copy promotions from the previous year or create them from scratch. With new features in Retail Execution, you can calculate accurate prices for orders even when you're offline. Additionally, you can now accurately track your inventories and assets. With additional enhancements, field reps can now collect payments, create and access reports for their daily activities, and do more.

#### [Financial Services Cloud](#)

Create custom relationship graphs with the enhanced Actionable Relationship Center. Discover how easy it is to use, customize, and generate reports in Branch Management. Compliant Data Sharing is available for custom objects.

#### [Health Cloud](#)

Health Cloud brings you even closer to your patients and salespeople with new visual displays and data management tools. Define a unified health profile for patients and track their health scores. Let sales reps know when products are expiring. Create interactive timelines to provide a holistic view of patients' health information. Map more fields from forms and documents to Salesforce records and create Document Checklist Items automatically. Set up identity verification faster with the setup assistant, use external data to perform identity verification, and translate custom field labels. Monitor medication reviews in the medication list, and let users reconcile medications in Experience Cloud. Add more details about care requests with Utilization Management's data model changes and API updates. Use two new dashboards to manage patients' medication use.

#### [Loyalty Management](#)

Simulate how transaction journals are processed by loyalty program processes. Use built-in filters that decide which transactions are processed by rules. Add prepaid and postpaid partners to your loyalty program and run joint promotions with the partners. Use member engagement attributes to track and reward members for their long-term behavior. Update members' qualifying points balance in real time. Automatically set the expiration date for points credited back to members for canceled redemptions. Learn about members' Salesforce CDP segment when processing their transactions. Issue multiple vouchers with the same voucher code.

#### [Manufacturing Cloud](#)

Efficiently run your program based business by generating forecasts for your products and components based on your customers' forecasts. Then, transform your product forecasts into business opportunities based on profitability analysis, and convert those opportunities into run-rate business. Manage warranties for your products and assets with Manufacturing Cloud for Service.

### Public Sector Solutions

Get help with configuring Public Sector Solutions by using Guided Setup. Set up Dynamic Assessments to help inspectors, caseworkers, and compliance officers conduct comprehensive inspections, investigations, and evaluations. Design customized care plans to help caseworkers attend to the health care and social services needs of their constituents.

### Net Zero Cloud

Track and benchmark your building energy use intensity across various fuel types as a function of building size and geographic location. You can also identify and fix missing or incomplete data for your carbon footprint record.

### Industries Common Components

Some Industries products are available for use in more than one Industries cloud, or in clouds outside of Industries. With this release, create recurring action plans with the action plan scheduler. Use the Discovery Framework to create digital forms to collect and validate data. Check out improvements to Batch Management, Business Rules Engine, and much more.

## Consumer Goods Cloud

Plan, run, monitor, and analyze your promotions with Trade Promotion Management. Set up promotional activities after you define your business and account plans in detail. You can either copy promotions from the previous year or create them from scratch. With new features in Retail Execution, you can calculate accurate prices for orders even when you're offline. Additionally, you can now accurately track your inventories and assets. With additional enhancements, field reps can now collect payments, create and access reports for their daily activities, and do more.

### EDITIONS

Available in: **Developer**, **Enterprise**, **Performance**, and **Professional** editions.

### IN THIS SECTION:

#### Trade Promotion Management

Trade Promotion Management helps consumer goods manufacturers design and implement promotions for their retailers. You can create customized promotions, view and evaluate the progress of these promotions, set up funds from the allocated budget, and settle retailer claims.

#### Retail Execution

When you configure penny perfect pricing in your org, your sales reps can calculate accurate prices for orders even when they're offline. You can also get insights about your stores and products with store-specific questions and product-specific surveys in visits. Additionally, with the new, inventory management and asset management features, you can now accurately track your inventories and assets. When a rep is unavailable, assign a substitute rep to customers to ensure service continuity. With additional enhancements, field reps can now collect payments, create and access reports for their daily activities, and do more.

#### Consumer Goods Has New Objects

Do more with the new Consumer Goods Cloud objects. For more information about new objects and fields, see Consumer Goods Cloud Developer Guide.

## Trade Promotion Management

Trade Promotion Management helps consumer goods manufacturers design and implement promotions for their retailers. You can create customized promotions, view and evaluate the progress of these promotions, set up funds from the allocated budget, and settle retailer claims.



## IN THIS SECTION:

### [See a Consolidated Plan for an Account](#)

An account plan is an aggregated view that lets your key account manager (KAM) review and analyze the effectiveness of the promotions as a whole for a customer. The account plan provides a central point for monitoring and comparing planned, latest estimates and actual KPIs for a customer, timeframe, and product combination. This lets the KAM evaluate whether targets are being met, review base adjustments and long-term agreements, and analyze the variances between planned and actual KPIs. The account plan summarizes both the promotional and non-promotional volume and costs for a customer.

### [Define Funds for Your Promotions](#)

After targets are set, you can assign funds and allocate a budget to sponsor promotions to achieve the defined targets. Funds come in various shapes and sizes – each serving a distinct purpose in executing trade promotions. Finance managers and key account managers can add money into a fund in two ways: Fixed funding and Rate-based funding.

### [Set up and View Your Trade Calendar](#)

The Trade Calendar view provides one single source of truth across all activations (marketing activities, national promotions, and so on). You can define your Trade Calendar view, group available promotions by slogan, group text, customer, or product, see all the relevant promotions on a Gantt chart, and hover over a promotion to view the customer, promotion, slogan, status, and the start and end dates of the promotion.

### [Set up and Monitor Your Promotions](#)

Monitor the key aspects of a promotion on a single tab. The Promotions tab provides an overview of the selected promotion, its associated tactics, and key performance indicators. Use the Edit mode to plan a full promotion without having to stop and save after every step. Sales leaders can also create promotions at a national level and cascade them to applicable accounts.

### [Configure the Appearance of Your Promotions](#)

Use a UI contract to define the appearance and features of your promotions and tactics. You can specify a variety of layouts for different categories of promotions and tactics.

### [Settle Retailer Claims](#)

After executing promotion tactics, the retailer claims a remuneration request for the executed tactic. This compensation reflects in the application as a claim and is linked to the tactic with which it is associated.

### [Understand Performance with Real-time Reporting](#)

See a live view of the impact of your promotion planning for a selected customer and timeframe without even saving a promotion. This feature supports an iterative planning process and lets you retrieve key business metrics and configure reports based on your requirements.

### [Configure Your Key Performance Indicators](#)

Key performance indicators (KPIs) are the metrics set up for measuring and calculating promotions and account plans. You can create individual KPIs using KPI definitions and configure settings for each KPI. You can then associate one or more KPI definitions with a KPI set.

## See a Consolidated Plan for an Account

An account plan is an aggregated view that lets your key account manager (KAM) review and analyze the effectiveness of the promotions as a whole for a customer. The account plan provides a central point for monitoring and comparing planned, latest estimates and actual KPIs for a customer, timeframe, and product combination. This lets the KAM evaluate whether targets are being met, review base adjustments and long-term agreements, and analyze the variances between planned and actual KPIs. The account plan summarizes both the promotional and non-promotional volume and costs for a customer.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to key account managers, category and brand managers, trade marketers, and account directors.

**How:** From the App Launcher, find and select **Trade Calendar**. Click **P&L**, and then filter the view for a single account.

KPI / Product Dimension	Total	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22
PV Volume	4,648,854	391,320	287,083	316,471	296,652	294,769	289,301	301,137
Target Volume	6,055,391	425,745	441,325	540,745	488,215	487,399	522,575	496,014
Target Revenue	92,483,890.65	6,510,140.60	6,754,081.42	8,272,532.12	7,468,058.20	7,454,375.86	7,987,617.85	7,375,949.25
Interfaced Base Volume	4,117,832	289,623	300,354	367,852	332,114	331,361	355,491	337,401
Adjusted Base Volume								
Planned Base Volume	4,117,832	289,623	300,354	367,852	332,114	331,361	355,491	337,401
Planned Incr. Volume	1,969,199	115,476	24,302	27,889	15,109	15,176	0	0
Planned Total Volume	6,187,131	405,099	324,656	394,941	347,223	346,537	355,491	337,401
ChocoLow	1,275,556	70,893	50,964	66,059	62,562	55,343	59,838	57,801
HiChoc	1,876,113	186,778	125,499	164,946	148,378	147,688	158,045	148,882
Loppies!	1,207,888	50,690	58,030	58,298	54,481	58,193	57,262	54,536
Uppies	1,747,574	94,738	80,163	104,738	81,862	85,513	80,316	76,211
Planned vs Target Volume	55.74%	-25.84%	-116.86%	-145.80%	-145.95%	-145.66%	-167.08%	-156.58%
Planned vs LY Volume %	23.88 %	3.40 %	11.57 %	19.11 %	14.56 %	14.99 %	18.45 %	10.76 %
New Item Cases								
Planned Gross Revenue	90,023,681.15	6,161,374.69	6,316,405.57	8,053,004.22	7,277,215.57	7,257,385.32	7,403,727.75	6,753,794.39
Planned Non-Promo Spend	11,941,647.00	758,206.00	649,312.00	776,337.50	688,774.00	695,474.00	710,862.00	674,862.00
Planned Fixed Promo Spend	934,999.98	55,714.30	14,285.68		150,000.00	77,142.87	2,837.16	

SEE ALSO:

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

## Define Funds for Your Promotions

After targets are set, you can assign funds and allocate a budget to sponsor promotions to achieve the defined targets. Funds come in various shapes and sizes – each serving a distinct purpose in executing trade promotions. Finance managers and key account managers can add money into a fund in two ways: Fixed funding and Rate-based funding.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to key account managers and finance managers.

**How:** From the App Launcher, find and select **Funds**.

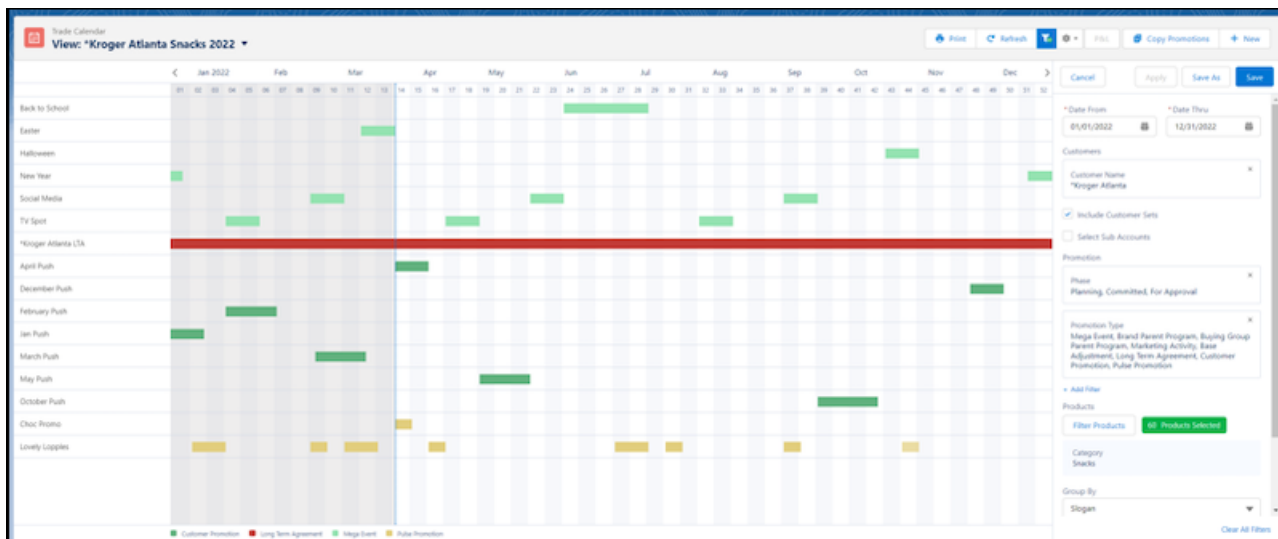
## Set up and View Your Trade Calendar

The Trade Calendar view provides one single source of truth across all activations (marketing activities, national promotions, and so on). You can define your Trade Calendar view, group available promotions by slogan, group text, customer, or product, see all the relevant promotions on a Gantt chart, and hover over a promotion to view the customer, promotion, slogan, status, and the start and end dates of the promotion.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to key account managers, sales roles, and marketing roles.

**How:** From the App Launcher, find and select **Trade Calendar**.



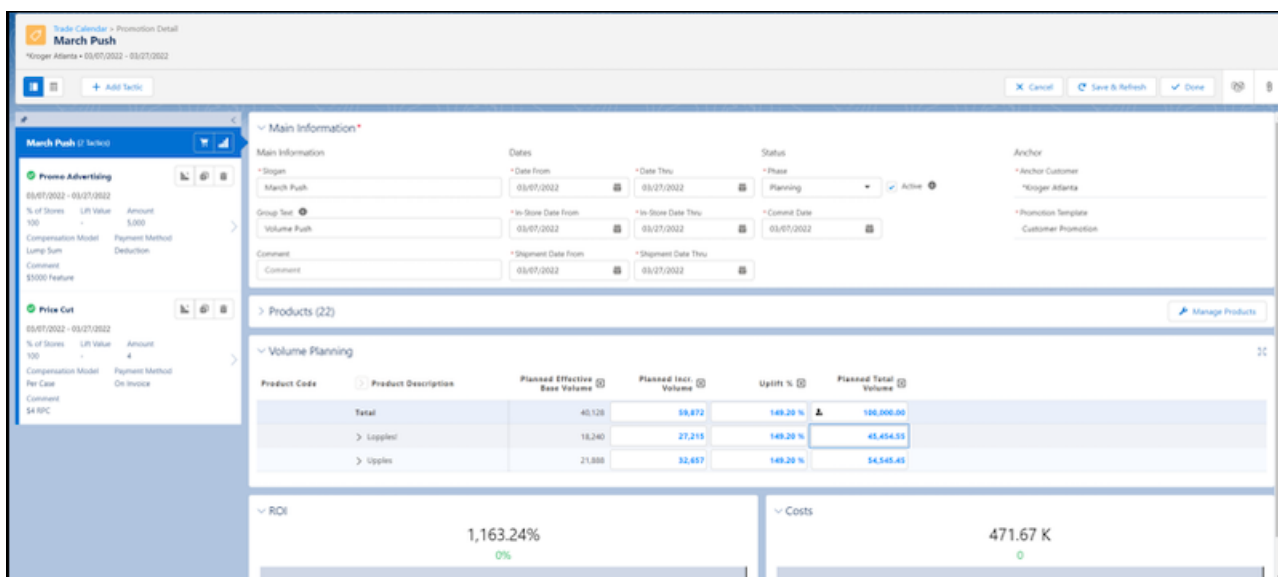
## Set up and Monitor Your Promotions

Monitor the key aspects of a promotion on a single tab. The Promotions tab provides an overview of the selected promotion, its associated tactics, and key performance indicators. Use the Edit mode to plan a full promotion without having to stop and save after every step. Sales leaders can also create promotions at a national level and cascade them to applicable accounts.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to key account managers.

**How:** From the App Launcher, find and select **TPM Promotions**.



## Configure the Appearance of Your Promotions

Use a UI contract to define the appearance and features of your promotions and tactics. You can specify a variety of layouts for different categories of promotions and tactics.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to business administrators.


**How:** From the App Launcher, find and select **UI Contracts**.

## Settle Retailer Claims

After executing promotion tactics, the retailer claims a remuneration request for the executed tactic. This compensation reflects in the application as a claim and is linked to the tactic with which it is associated.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**How:** From the App Launcher, find and select **Claims**.

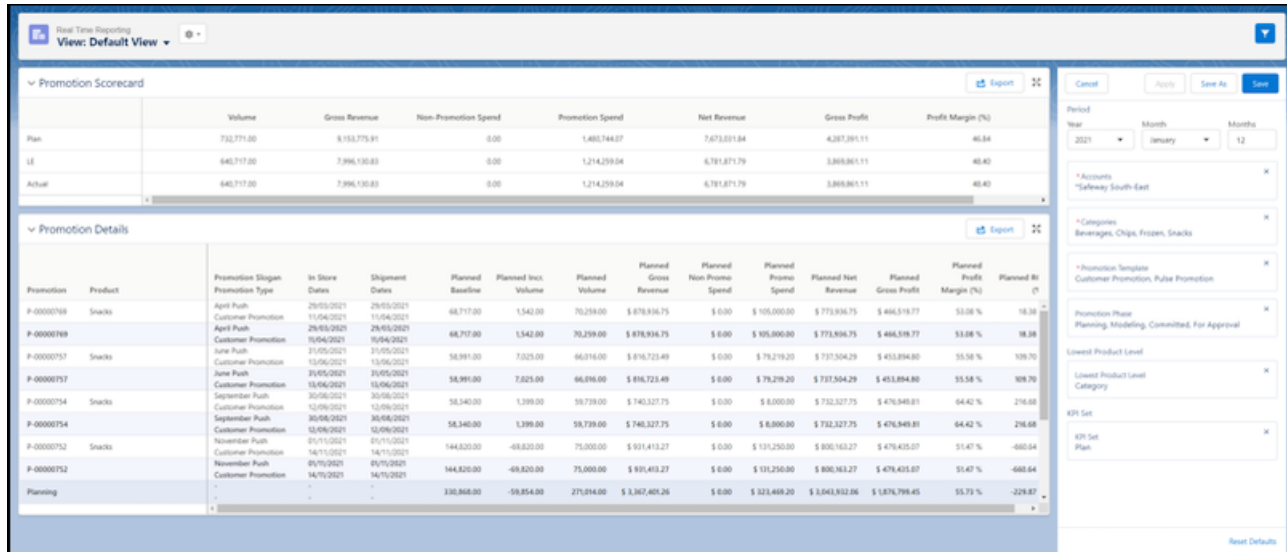
 **Note:** The actual payments happen outside the application. The application contains the contractual basis for payments and links a payment request with the related promotional activity.

## Understand Performance with Real-time Reporting

See a live view of the impact of your promotion planning for a selected customer and timeframe without even saving a promotion. This feature supports an iterative planning process and lets you retrieve key business metrics and configure reports based on your requirements.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**How:** You can install the Real-time reporting package on your org.



**Real-time Reporting**  
View: Default View

**Promotion Scorecard**

	Volume	Gross Revenue	Non-Promotion Spend	Promotion Spend	Net Revenue	Gross Profit	Profit Margin (%)
Plan	732,771.00	8,153,775.81	0.00	1,480,744.07	7,673,031.84	4,287,381.11	46.84
IE	640,717.00	7,896,130.83	0.00	1,214,259.04	6,781,871.79	3,895,361.11	46.42
Actual	640,717.00	7,896,130.83	0.00	1,214,259.04	6,781,871.79	3,895,361.11	46.42

**Promotion Details**

Promotion	Product	Promotion Slogan	Promotion Type	In Store Dates	Shipment Dates	Planned Baseline	Planned Incr. Volume	Planned Volume	Planned Gross Revenue	Planned Non-Promo Spend	Planned Promo Spend	Planned Net Revenue	Planned Gross Profit	Planned Profit Margin (%)	Planned R. Ct
P-00000769	Snacks	April Push	Customer Promotion	28/03/2021 - 15/04/2021	28/03/2021 - 15/04/2021	68,717.00	1,342.00	70,259.00	\$ 678,936.75	\$ 0.00	\$ 105,000.00	\$ 773,936.75	\$ 466,316.77	53.08 %	18.38
P-00000769	Snacks	April Push	Customer Promotion	28/03/2021 - 15/04/2021	28/03/2021 - 15/04/2021	68,717.00	1,342.00	70,259.00	\$ 678,936.75	\$ 0.00	\$ 105,000.00	\$ 773,936.75	\$ 466,316.77	53.08 %	18.38
P-00000757	Snacks	June Push	Customer Promotion	31/05/2021 - 13/06/2021	31/05/2021 - 13/06/2021	58,991.00	7,025.00	66,016.00	\$ 616,723.49	\$ 0.00	\$ 79,219.20	\$ 737,504.29	\$ 453,894.80	55.58 %	109.70
P-00000757	Snacks	June Push	Customer Promotion	31/05/2021 - 13/06/2021	31/05/2021 - 13/06/2021	58,991.00	7,025.00	66,016.00	\$ 616,723.49	\$ 0.00	\$ 79,219.20	\$ 737,504.29	\$ 453,894.80	55.58 %	109.70
P-00000754	Snacks	September Push	Customer Promotion	30/08/2021 - 12/09/2021	30/08/2021 - 12/09/2021	58,140.00	1,399.00	59,739.00	\$ 740,327.75	\$ 0.00	\$ 8,000.00	\$ 732,327.75	\$ 476,949.81	64.42 %	216.68
P-00000754	Snacks	September Push	Customer Promotion	30/08/2021 - 12/09/2021	30/08/2021 - 12/09/2021	58,140.00	1,399.00	59,739.00	\$ 740,327.75	\$ 0.00	\$ 8,000.00	\$ 732,327.75	\$ 476,949.81	64.42 %	216.68
P-00000752	Snacks	November Push	Customer Promotion	01/11/2021 - 14/11/2021	01/11/2021 - 14/11/2021	144,820.00	-49,820.00	75,000.00	\$ 931,413.27	\$ 0.00	\$ 101,250.00	\$ 830,163.27	\$ 476,403.07	51.47 %	-460.64
P-00000752	Snacks	November Push	Customer Promotion	01/11/2021 - 14/11/2021	01/11/2021 - 14/11/2021	144,820.00	-49,820.00	75,000.00	\$ 931,413.27	\$ 0.00	\$ 101,250.00	\$ 830,163.27	\$ 476,403.07	51.47 %	-460.64
Planning	-	-	-	-	-	330,968.00	-59,854.00	271,014.00	\$ 3,367,401.26	\$ 0.00	\$ 323,469.20	\$ 3,043,932.06	\$ 1,876,799.45	55.73 %	-229.87

**Configuration Panel:**

- Period: Year 2021, Month January, Month 12
- Accounts: \*Safetyway South-East
- Categories: Beverages, Chips, Frozen, Snacks
- Promotion Template: \*Customer Promotion, Pulse Promotion
- Promotion Phase: Planning, Modeling, Committed, For Approval
- Lowest Product Level: Lowest Product Level Category
- KPI Set: KPI Set Plan

Reset Defaults

## Configure Your Key Performance Indicators

Key performance indicators (KPIs) are the metrics set up for measuring and calculating promotions and account plans. You can create individual KPIs using KPI definitions and configure settings for each KPI. You can then associate one or more KPI definitions with a KPI set.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited Editions that have Consumer Goods Cloud Trade Promotion Management enabled.

**Who:** This feature is available to business administrators.

**How:** From the App Launcher, find and select **KPI Sets**.

## Retail Execution

When you configure penny perfect pricing in your org, your sales reps can calculate accurate prices for orders even when they're offline. You can also get insights about your stores and products with store-specific questions and product-specific surveys in visits. Additionally, with the new, inventory management and asset management features, you can now accurately track your inventories and assets. When a rep is unavailable, assign a substitute rep to customers to ensure service continuity. With additional enhancements, field reps can now collect payments, create and access reports for their daily activities, and do more.

### EDITIONS

Available in: Developer, Enterprise, Performance, and Professional editions.

### IN THIS SECTION:

#### [Get Accurate Order Prices Offline with Penny Perfect Pricing](#)

Configure Penny Perfect Pricing in your org to let your sales reps calculate accurate prices for orders even when they're offline. In the Consumer Goods offline mobile app, reps can calculate prices for orders with different scales, different units of measure, and different conditions such as discounts, amount per unit, and flat rates.

#### [Get Insights About Stores and Products with Store Audits and Surveys](#)

Create store-specific questions and product-specific surveys, and add them to visits as visit activities. Field reps can record the responses during store visits. Create conditional questions to be displayed based on the response for the primary question. The gamified Activity Performance card in the Consumer Goods offline mobile app makes performance monitoring fun. Reps can see the percentage completion of an activity in real time and win badges.

#### [Create Effective Visits with Job Lists](#)

Win your customers' trust by ensuring that none of the activities planned for them is ever missed. Use a predefined job list to quickly create a visit and automatically assign all the activities in that job list to the visit.

#### [Track Your Inventories Accurately](#)

Create inventories to accurately track products that sales reps deal with. With more clarity on the available inventory, sales reps can execute orders better. Define quotas for reps and customers for controlled distribution of specific products based on legal requirements or company rules.

#### [Track and Assess Your Assets](#)

Ensure that assets assigned to a customer are in the right store. Identify any unallocated assets in a store and allocate them to the store to stay legally compliant. With regular asset audits, keep a tab on your assets' conditions and ensure timely repair and replacement to reduce losses and ensure employee safety.

#### [Scan Faster and Better with External Barcode Scanners](#)

The Consumer Goods offline mobile app now supports external, bluetooth barcode scanners. Connect your mobile device with the barcode scanner via bluetooth and enjoy faster, more accurate, and more convenient scanning. Sales reps can scan a product's barcode to quickly open the product details. When field reps track an asset using a barcode scanner, the asset details are automatically populated.

#### [Manage Teams Better with Supervisors](#)

Designate supervisors in your org who can plan and review planned visits, monitor and review reps' visit details, and execute visits. Supervisors can approve reps' daily reports and view their performance reports.

### [Collaborate with Your Team Better with Notifications and Shared Notes](#)

Supervisors can now help their reps achieve the team's objectives by setting up user and customer tasks. With notifications and shared notes, supervisors can collaborate with their teams better and help them perform better. For example, a notification about the topics for the next team meeting helps a rep prepare for the meeting in advance. Supervisors can create notifications from the Consumer Goods (desktop) app and sales reps can view these notifications from the Consumer Goods offline mobile app.

### [Create Dynamic Customer Sets with Segmentation Rules](#)

Customer sets are now automatically created when daily batch processes run. They're created based on the segmentation rules and updates in customer records. For example, you can define a segmentation rule to create a customer set that includes all the priority customers of a region.

### [Monitor Visits and Product Sales with Live Reports](#)

Use Visit Rate and Unsuccessful Visits reports to identify whether a rep needs help when executing visits. When sales reps complete visits, the Visit Rate and Unsuccessful Visits reports are automatically updated. If the percentage of unsuccessful visits for a rep is high, devise a coaching plan to improve their visit completion rate. Use the Survey Exceptions report to analyze how products in a store are performing, and guide your reps to increase sales. The Survey Exceptions report is based on the answers captured during product-specific surveys.

### [Collect and Record Payments in the Order Header Tab](#)

Field reps can now collect payments from customers who don't have sufficient credit limit or from cash customers. Field reps can collect payment in customer's preferred payment method and provide documentation for the collected payments.

### [Ensure Service Continuity with Rep Substitutes](#)

Assign substitute field reps when needed, so you never leave a customer unattended. Create a substitution record to capture the absence details of the unavailable rep. Then, use that substitution record to assign a substitute to one or more customers.

## Get Accurate Order Prices Offline with Penny Perfect Pricing

Configure Penny Perfect Pricing in your org to let your sales reps calculate accurate prices for orders even when they're offline. In the Consumer Goods offline mobile app, reps can calculate prices for orders with different scales, different units of measure, and different conditions such as discounts, amount per unit, and flat rates.



**Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

**Who:** To use this feature, users need the Penny Perfect Pricing license and Penny Perfect Pricing permission set.

**How:** Use pricing condition templates and calculation schemas to define how penny perfect calculation is initiated and executed on mobile devices.

SEE ALSO:

[Penny Perfect Pricing](#)

## Get Insights About Stores and Products with Store Audits and Surveys

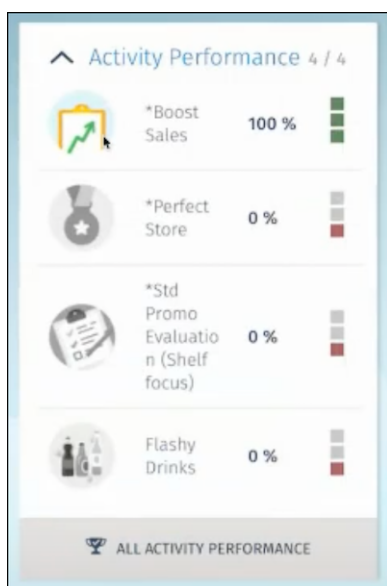
Create store-specific questions and product-specific surveys, and add them to visits as visit activities. Field reps can record the responses during store visits. Create conditional questions to be displayed based on the response for the primary question. The gamified Activity Performance card in the Consumer Goods offline mobile app makes performance monitoring fun. Reps can see the percentage completion of an activity in real time and win badges.

**Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

**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:** Define questions and surveys as visit activities and then assign a visit template to these activities. When a visit is created from that visit template, the activities are automatically assigned to the visit.

Reps can see the progress of their activities in the Activity Performance card in the store cockpit.



SEE ALSO:

[Job Management](#)

## Create Effective Visits with Job Lists

Win your customers' trust by ensuring that none of the activities planned for them is ever missed. Use a predefined job list to quickly create a visit and automatically assign all the activities in that job list to the visit.

**Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

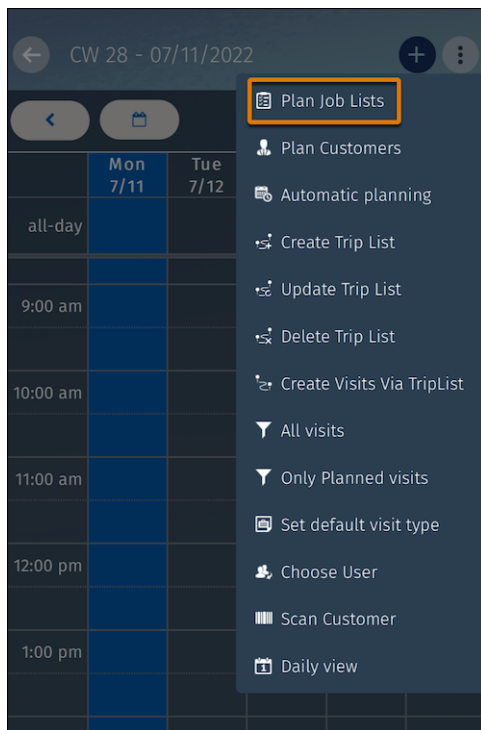
**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

**How:** To create a visit from a job list in the Consumer Goods app, from the App Launcher, find and select **Visits**, and then click **Job List Planning**.

The screenshot shows the Salesforce 'Field Sales Execution' interface. The 'Visits' tab is selected, and the 'Job List Planning' sub-tab is highlighted with an orange box. Below the tabs, there is a table with columns: Name, Status, Planned Start Time, Planned End Time, and Visit Priority. The table contains three rows of planned visits.

	Name	Status	Planned Start Time	Planned End Time	Visit Priority
1	00000382	Planned	6/27/2022, 2:34 PM	6/27/2022, 4:04 PM	
2	00000381	Planned	6/23/2022, 12:30 PM	6/23/2022, 2:00 PM	
3	00000380	Planned	6/14/2022, 2:02 PM	6/14/2022, 3:32 PM	

To create a visit from a job list in the Consumer Goods offline mobile app, in the Weekly view, tap , and then select **Plan Job Lists**.




SEE ALSO:

[Create Visits by Using Job Lists](#)

## Track Your Inventories Accurately

Create inventories to accurately track products that sales reps deal with. With more clarity on the available inventory, sales reps can execute orders better. Define quotas for reps and customers for controlled distribution of specific products based on legal requirements or company rules.

 **Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.


**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.

SEE ALSO:

[Inventory Management](#)

## Track and Assess Your Assets

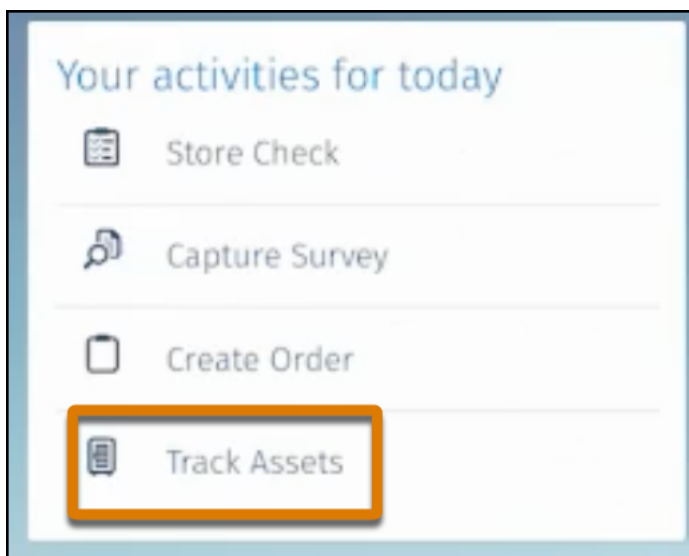
Ensure that assets assigned to a customer are in the right store. Identify any unallocated assets in a store and allocate them to the store to stay legally compliant. With regular asset audits, keep a tab on your assets' conditions and ensure timely repair and replacement to reduce losses and ensure employee safety.

 **Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.



**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 track assets, from the store cockpit, tap **Track Assets**.



Use an external barcode scanner to scan the asset's barcode. The asset information is displayed on the screen.



**Note:** You can use an external barcode scanner only with the Consumer Goods offline mobile app.

To create an asset audit, from the App Launcher, find and select **Asset Audits**, and then click **New**.

SEE ALSO:

[Asset Management](#)

## Scan Faster and Better with External Barcode Scanners

The Consumer Goods offline mobile app now supports external, bluetooth barcode scanners. Connect your mobile device with the barcode scanner via bluetooth and enjoy faster, more accurate, and more convenient scanning. Sales reps can scan a product's barcode to quickly open the product details. When field reps track an asset using a barcode scanner, the asset details are automatically populated.




**Note:** This feature is available in the Consumer Goods offline mobile app only with the enhanced Consumer Goods data model (Spring '22 onwards).

**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.

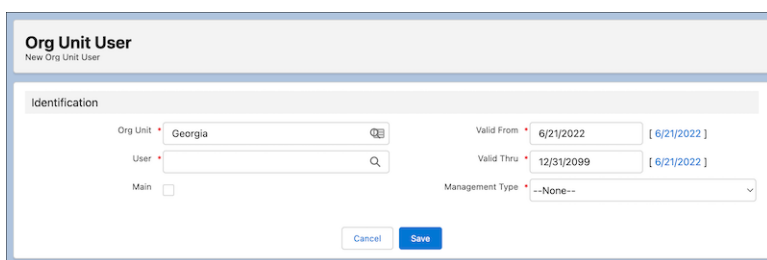
## Manage Teams Better with Supervisors

Designate supervisors in your org who can plan and review planned visits, monitor and review reps' visit details, and execute visits. Supervisors can approve reps' daily reports and view their performance reports.

 **Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.


**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 let a supervisor do managerial work, assign the supervisor to the team's org units. On an org unit record page, in the Org Unit Users related list, click **New**, and select a user.



## Collaborate with Your Team Better with Notifications and Shared Notes

Supervisors can now help their reps achieve the team's objectives by setting up user and customer tasks. With notifications and shared notes, supervisors can collaborate with their teams better and help them perform better. For example, a notification about the topics for the next team meeting helps a rep prepare for the meeting in advance. Supervisors can create notifications from the Consumer Goods (desktop) app and sales reps can view these notifications from the Consumer Goods offline mobile app.

 **Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

**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, view tasks, customer tasks, and notifications in the user and store cockpits.


You can create notifications, notes, user tasks, and customer tasks from the App Launcher the Consumer Goods (desktop) app.

SEE ALSO:

[Team Supervision](#)

## Create Dynamic Customer Sets with Segmentation Rules

Customer sets are now automatically created when daily batch processes run. They're created based on the segmentation rules and updates in customer records. For example, you can define a segmentation rule to create a customer set that includes all the priority customers of a region.

 **Note:** These features are available only with the enhanced Consumer Goods data model (Spring '22 onwards).

**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:** Create segmentation rule definitions. When the segmentation rules are run, various customer sets are created based on those rules.

	Segmentation Rule Definition	State	Use Account Hierar...	Use Org Unit Hier...	Segmentation Query
1	Comprehensive rule definition	Released	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SELECT cgcloud_dev__Account__c FROM cgcloud...
2	OrgUnit - Store Segmentation ...	Released	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SELECT cgcloud_dev__Account__c FROM cgcloud...
3	OrgUnit - In State and Priority	Released	<input type="checkbox"/>	<input checked="" type="checkbox"/>	SELECT Account__C FROM cgcloud_dev__Accoun...
4	In State	Released	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SELECT Id FROM Account WHERE ShippingState L...
5	In State AND In Priority	Released	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SELECT cgcloud_dev__Account__c FROM cgcloud...
6	Has Class of Trade	Released	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SELECT cgcloud_dev__Account__c FROM cgcloud...

SEE ALSO:

[Customer Segmentation](#)

## Monitor Visits and Product Sales with Live Reports

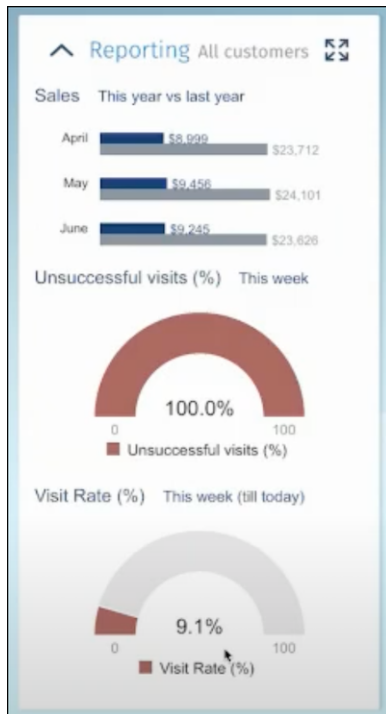
Use Visit Rate and Unsuccessful Visits reports to identify whether a rep needs help when executing visits. When sales reps complete visits, the Visit Rate and Unsuccessful Visits reports are automatically updated. If the percentage of unsuccessful visits for a rep is high, devise a coaching plan to improve their visit completion rate. Use the Survey Exceptions report to analyze how products in a store are performing, and guide your reps to increase sales. The Survey Exceptions report is based on the answers captured during product-specific surveys.



**Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards) and in the Consumer Goods offline mobile app.

**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, view the live reports in the user cockpit.




SEE ALSO:

[Reports](#)

## Collect and Record Payments in the Order Header Tab

Field reps can now collect payments from customers who don't have sufficient credit limit or from cash customers. Field reps can collect payment in customer's preferred payment method and provide documentation for the collected payments.

 **Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards) and in the Consumer Goods offline mobile app.

**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:** Enter the payment details in the Order Header tab.

## Ensure Service Continuity with Rep Substitutes

Assign substitute field reps when needed, so you never leave a customer unattended. Create a substitution record to capture the absence details of the unavailable rep. Then, use that substitution record to assign a substitute to one or more customers.



**Note:** This feature is available only with the enhanced Consumer Goods data model (Spring '22 onwards). You can use this feature in Consumer Goods (desktop) and in the Consumer Goods offline mobile app.

**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.

SEE ALSO:

[Substitution Management](#)

## Consumer Goods Has New Objects

Do more with the new Consumer Goods Cloud objects. For more information about new objects and fields, see Consumer Goods Cloud Developer Guide.

**Where:** This feature applies to the Consumer Goods app in Developer, Enterprise, Performance, and Professional editions.

**Who:** To access the objects, admins must assign the Retail Execution Cloud Permission Set licenses to users.

## Financial Services Cloud

Create custom relationship graphs with the enhanced Actionable Relationship Center. Discover how easy it is to use, customize, and generate reports in Branch Management. Compliant Data Sharing is available for custom objects.



**Note:** For information about [Action Plans](#) on page 433, [Discovery Framework](#) on page 438, [Business Rules Engine](#) on page 441, [Record Alerts](#) on page 465, [Document Generation](#), [OmniStudio](#) on page 560 and other features that are available in Financial Services Cloud as well as other Salesforce Industries clouds, check out [Industries Common Components](#) on page 431.

**IN THIS SECTION:**[Actionable Relationship Center](#)

Build graphs with standard and custom objects to show relevant customer relationship data to your users with the Actionable Relationship Center.

[Interaction Summaries](#)

You can now add the Interaction Attendee related list to Person Accounts and Contacts.

[Financial Accounts and Transactions](#)

With the FSCFinancialAccountsDetails component, service agents and bankers can resolve customer queries quickly and efficiently.

[Interest Tags](#)

Save your users time and help them deepen customer relationships with Interest Tags on interaction summaries.

[Record Association Builder](#)

Enhancements to record association builder make it easier to define criteria, view errors, track changes, and create reports.

[Branch Management](#)

Enhancements to Branch Management make it easier to customize, use, and report.

[Record Rollup](#)

Update records silently when record rollup logic updates the household field on a record.

[Compliant Data Sharing](#)

Compliant data sharing is now available for custom objects.

[Dynamic Dashboard](#)

License changes for dynamic dashboards.

[Financial Services Cloud Community Licenses](#)

Changes to Financial Services Cloud permission set licenses and add-ons.

[Insurance for Financial Services Cloud](#)

Use the new dashboards for Insurance Claims and Policy Analytics to analyze distributors' performance and identify opportunities to upsell or cross-sell policies. Get predictive insights on the likelihood of policy renewals faster with the new Policy Renewal Prediction app.

[New and Changed Financial Services Cloud Object Fields](#)

Do more with new and updated Financial Services Cloud objects.

[REST API](#)

Financial Services Cloud REST API includes enhanced calls.

[New Financial Services Cloud Metadata Types](#)

Make the most of the changed metadata types of Financial Services Cloud.

[New Tooling API Objects in Financial Services Cloud](#)

Use Tooling APIs to work with Financial Services Cloud objects.

## Actionable Relationship Center

Build graphs with standard and custom objects to show relevant customer relationship data to your users with the Actionable Relationship Center.

**IN THIS SECTION:**[Create Custom Relationship Graphs with ARC](#)

With the new improved Actionable Relationship Center (ARC), build graphs with standard and custom objects, then add the ARC Relationship Graph component to page layouts to show your graphs. Customize node names, show fields, and object and record actions so that your users can easily view, edit, delete, and create records during customer interactions. In the first version of ARC, you can't customize the graph. Display ARC relationship graphs on Experience Cloud pages so your partner users can view and interact with client data in real time.

## Create Custom Relationship Graphs with ARC

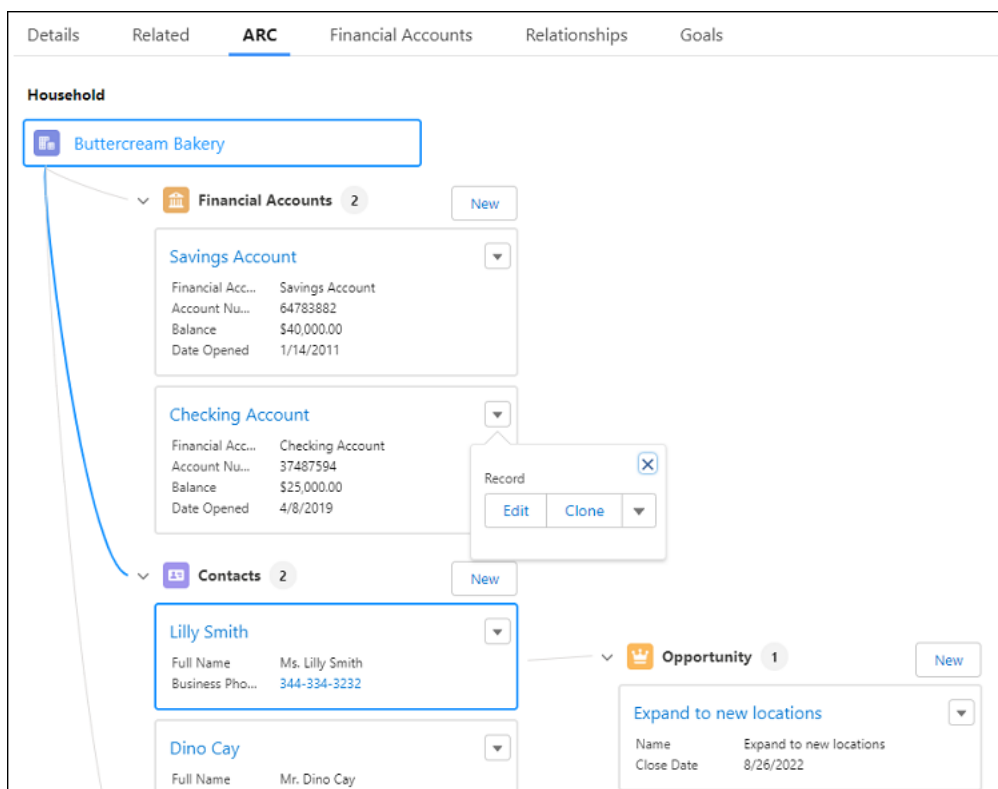
With the new improved Actionable Relationship Center (ARC), build graphs with standard and custom objects, then add the ARC Relationship Graph component to page layouts to show your graphs. Customize node names, show fields, and object and record actions so that your users can easily view, edit, delete, and create records during customer interactions. In the first version of ARC, you can't customize the graph. Display ARC relationship graphs on Experience Cloud pages so your partner users can view and interact with client data in real time.

**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:** Show relevant customer information to your users based on their profile by creating multiple graphs per object, then add them to page layouts. For example, Financial Advisors want an easy-to-understand view of their client's household that shows the primary point of contact, family member relationships, financial summary, and family assets. Whereas Investment Bankers want to know who the key executives are, what the account structure and history looks like, the latest news in the company or industry, and view who is working on deals.

**How:** In Setup, create relationship graphs for the objects most relevant to your users. Then add the ARC Relationship Graph component to page layouts to show graphs to your users.



SEE ALSO:

[Salesforce Help: Actionable Relationship Center \(ARC\)](#)

## Interaction Summaries

You can now add the Interaction Attendee related list to Person Accounts and Contacts.

IN THIS SECTION:

[Add Interaction Attendee Related List to Person Accounts and Contacts](#)

With the Interaction Attendees related list for Contacts and Person Accounts, you can quickly see all interactions in which a Contact or a Person Account was an attendee.

### Add Interaction Attendee Related List to Person Accounts and Contacts

With the Interaction Attendees related list for Contacts and Person Accounts, you can quickly see all interactions in which a Contact or a Person Account was an attendee.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Add the related list for Interaction Attendees to the Contact or the Person Account record page layout.

## Financial Accounts and Transactions

With the FSCFinancialAccountsDetails component, service agents and bankers can resolve customer queries quickly and efficiently.



## IN THIS SECTION:

[Provide a Comprehensive View of Customer's Financial Accounts Details](#)

Make life easier for your service agents and reduce screen-switching with the new FSCFinancialAccountsDetails component. Provide your service agents with a comprehensive view of their customers' financial account details in Financial Services Cloud. To resolve customer queries more easily, service agents can view details of customers' Savings and Checking accounts, Credit Cards, Investments, Mortgage, Loan accounts, Auto loans, and Home Equity Line of Credit (HELOC). Agents can also view the financial account transactions and record alerts associated with these accounts.

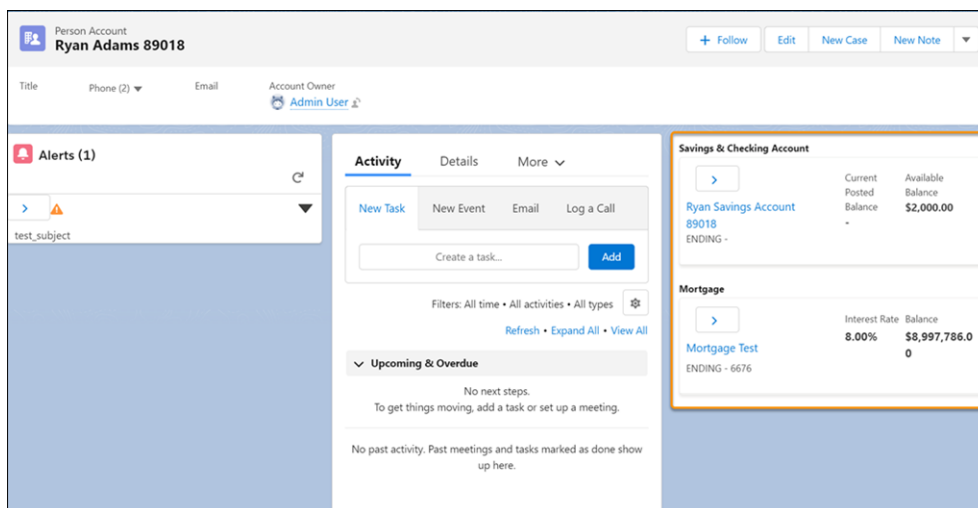
## Provide a Comprehensive View of Customer's Financial Accounts Details

Make life easier for your service agents and reduce screen-switching with the new FSCFinancialAccountsDetails component. Provide your service agents with a comprehensive view of their customers' financial account details in Financial Services Cloud. To resolve customer queries more easily, service agents can view details of customers' Savings and Checking accounts, Credit Cards, Investments, Mortgage, Loan accounts, Auto loans, and Home Equity Line of Credit (HELOC). Agents can also view the financial account transactions and record alerts associated with these accounts.

**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 and the OmniStudio User or OmniStudio Admin permission sets to use this feature.

**Why:** For example, a customer calls to report a fraudulent transaction. Instead of visiting multiple pages, the service agent can now view all the relevant customer financial account and transaction details at one place using a few clicks and quickly resolve the issue.



**How:** In Lightning App Builder, add the FSCFinancialAccountsDetails component to your account record pages.

## SEE ALSO:

[Salesforce Help: Provide a Comprehensive View of Customer's Financial Accounts Details](#)

## Interest Tags

Save your users time and help them deepen customer relationships with Interest Tags on interaction summaries.

## IN THIS SECTION:

[Personalize Interaction Summaries with Interest Tags](#)

Your users can now add Interest Tags to Interaction Summaries. Instead of wading through meeting notes to find relevant interactions, your users can filter interaction summaries based on interest tags to quickly find relevant interactions.

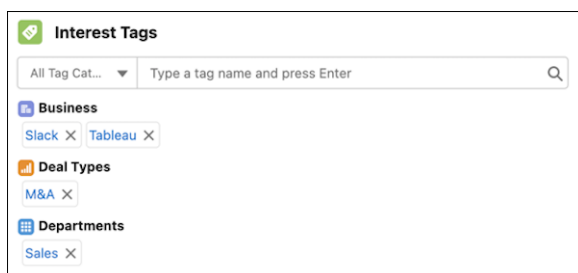
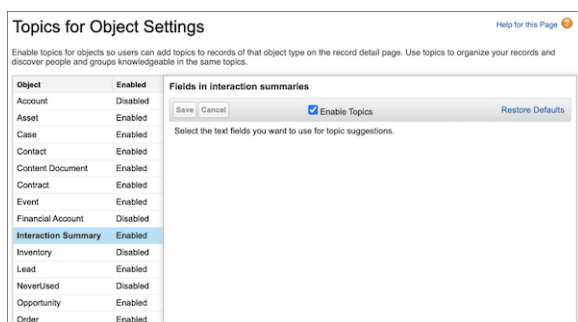
## Personalize Interaction Summaries with Interest Tags

Your users can now add Interest Tags to Interaction Summaries. Instead of wading through meeting notes to find relevant interactions, your users can filter interaction summaries based on interest tags to quickly find relevant interactions.

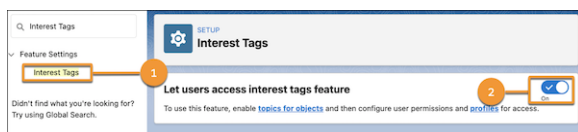
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**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 Deal Types, and then add interest tags called IPO, M&A, and Debt Capital Market. Based on client interactions, users can add Deal Types interest tags to the interaction summary.

**How:**

In Setup, turn on Topics for the Interaction Summary object. Assign interest tag user permissions by enabling the required Topics permissions on profiles.



Turn on Interest Tags and add the Financial Services Cloud Extension permission set to your user profiles.

## SEE ALSO:

[Salesforce Help: Add Interest Tags to Interaction Summaries](#)

## Record Association Builder

Enhancements to record association builder make it easier to define criteria, view errors, track changes, and create reports.

### IN THIS SECTION:

#### [View Error Event Details for Record Association Build Process](#)

The new Record Association Execution Error Event object shows details about why a branch unit related record failed to be created through the record association builder process. When the error event record is created, it provides you with next steps to resolve the issue, such as the type of error that occurred and the type of association criteria that was triggered from the error event.

#### [Receive Notifications About Error Events](#)

Subscribe to be notified when a branch unit related record fails to be created through the record association builder process. Build a Salesforce flow to subscribe to receive email notifications with a link to the Record Association Execution Error Event record that contains details on why the process failed.

#### [Track Person Account Record Changes Using Record Association Builder](#)

You can now create association criteria using person account fields. This lets you track record changes on the person account object.

#### [Create Association Criteria with Contact and Interaction Summary](#)

Contact and Interaction Summary are now supported as reference objects to create association criteria using Record Association Builder.

#### [Create Multiple Update Event Type Association Criteria](#)

You can now create more than one update association criteria for the same reference object. Previously you could create only one update association criteria per reference object.

#### [Create Branch Unit Related Record Reports with More Objects](#)

More report types are available for creating reports with Branch Unit Related Record. Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are now available.

## View Error Event Details for Record Association Build Process

The new Record Association Execution Error Event object shows details about why a branch unit related record failed to be created through the record association builder process. When the error event record is created, it provides you with next steps to resolve the issue, such as the type of error that occurred and the type of association criteria that was triggered from the error event.

**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.

### SEE ALSO:

[Salesforce Help: Record Association Execution Error Event](#)

## Receive Notifications About Error Events

Subscribe to be notified when a branch unit related record fails to be created through the record association builder process. Build a Salesforce flow to subscribe to receive email notifications with a link to the Record Association Execution Error Event record that contains details on why the process failed.

**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.

SEE ALSO:

[Platform Events Developer Guide: Subscribing to Platform Events](#)

## Track Person Account Record Changes Using Record Association Builder

You can now create association criteria using person account fields. This lets you track record changes on the person account object.

**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.

SEE ALSO:

[Record Association Builder: Define Association Criteria](#)

## Create Association Criteria with Contact and Interaction Summary

Contact and Interaction Summary are now supported as reference objects to create association criteria using Record Association Builder.

**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:** If your Salesforce org uses Contact rather than Person Account, you can now define association criteria to track changes on contact records.

Create association criteria with Interaction Summary to track changes to interactions with your customers.

## Association Criteria

Reference Object

All

Status

All

New Criteria

Delete Criteria

6 items, 0 selected, sorted by Last Modified Date

<input type="checkbox"/>	Label	Association Type	Reference Object	Event Type	Precondition
<input type="checkbox"/>	Interaction Summary Create	BranchManagement	InteractionSummary	Create	[InteractionSummary].Name = 'Follow-up'
<input type="checkbox"/>	Contact update	BranchManagement	Contact	Update	[Contact].MailingCity = 'san francisco'

SEE ALSO:

[Record Association Builder: Define Association Criteria](#)

## Create Multiple Update Event Type Association Criteria

You can now create more than one update association criteria for the same reference object. Previously you could create only one update association criteria per reference object.

**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:** The update event type is triggered only when the field in the precondition formula changes to meet the requirements of the formula. Other update association criteria for the same object are ignored if the field in their formula doesn't change.

For example, you have two update criteria for the Person Account reference object:

- Status field changes to Active.
- Net Worth field changes to greater than US\$500,000.

If a customer with a status of Active makes a deposit of US\$700,000 into their account, only the second association criteria is triggered. Because the customer status didn't change, the Status Update association criteria isn't triggered.

### Association Criteria

Reference Object

All

Status

All

New Criteria

Delete Criteria

4 items, 0 selected, sorted by ModifiedTime

<input type="checkbox"/>	Label	Association Type	Reference Object	Event Type	Precondition
<input type="checkbox"/>	Status Update	BranchManagement	Account	Update	ISPICKVAL([Account].FSC12_Status__c, "Active")
<input type="checkbox"/>	Net Worth Greater than 500k	BranchManagement	Account	Update	[Account].FSC12_NetWorth__c > 500000

SEE ALSO:

[Record Association Builder: Define Association Criteria](#)

## Create Branch Unit Related Record Reports with More Objects

More report types are available for creating reports with Branch Unit Related Record. Bankers with Branches with Opportunities, Accounts, Leads, and Contacts report types are now available.

**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.

SEE ALSO:

[Branch Management: Measure Performance with Branch Reportable Objects](#)

## Branch Management

Enhancements to Branch Management make it easier to customize, use, and report.

IN THIS SECTION:

[Manage Branch Unit Record Pages More Easily](#)

Several enhancements to the Branch Unit object make it easier to use and maintain.

[View Branch Unit Customer Records on Account Page Layouts](#)

See the branches that an account is related to by adding the Branch Unit Customer related list to the Account and Person Account page layouts.

[View Bankers' Branch Assignments at a Glance](#)

To see the branches that a banker is assigned to, add the Branch Unit Business Member related list to the Banker record page. Create reports that show the branches a banker is assigned to by customizing the UserOrContactID field on the banker object using custom formulas and then filtering by My Branch.

### [Customize the Branch Unit Related Record Object](#)

Branch Unit Related Record is now a customizable object. The Branch Unit Related Record lets you track data about the records that are created at your branch, such as the name of the branch that created the record, who created it, and the association criteria that triggered the record creation.

### [Do More with the Branch Selector](#)

To associate customer interactions with the correct branch, users can now view branch details, search for, add, and remove branches from the Branch Selector without contacting their Salesforce admin.

## Manage Branch Unit Record Pages More Easily

Several enhancements to the Branch Unit object make it easier to use and maintain.

**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:**

- To avoid conflicts, Branch Unit record names must be unique. If you previously created branch units with the same name, you'll be prompted to create a unique name when you edit the branch unit record.
- Parent Branch and Operating Hours fields are now included on the Branch Unit layout and in the highlights panel by default.
- Customize your Branch Unit page layout by adding the Record Type field so your users can quickly identify the type of record they're viewing.
- To save you time, Branch Unit Customer, Branch Unit Business Member, and Branch Unit Related Record related lists are now automatically added to the Branch Unit record page layout on new Financial Services Cloud orgs.
- Type field is now optional on the Branch Unit object.

The screenshot displays the 'Branch Unit' record page for '45 Smith Street Branch'. At the top, there are buttons for 'New Contact', 'New Opportunity', and 'New Case'. Below this, a header bar contains fields for Branch Code (123876), Branch Manager (Admin Banker), Type (Physical), Active (checked), Parent Branch, and Operating Hours (8am-5pm Pacific Time). The main content area is divided into two sections: 'Related' and 'Details'. The 'Details' section is expanded, showing a list of fields including Name (45 Smith Street Branch), Record Type (Branch), Account, Branch Code (123876), Branch Manager (Admin Banker), Type (Physical), Start Date, Operational State, Active (checked), End Date, Operating Hours (8am-5pm Pacific Time), and Service Territory. To the right, the 'Activity' section provides options to create new events, tasks, calls, or emails, and includes filters for 'All time', 'All activities', and 'All types'. Below the activity section, the 'Upcoming & Overdue' section indicates 'No next steps' and 'No past activity'.

SEE ALSO:

[Branch Management: Create Branch Unit Records](#)

## View Branch Unit Customer Records on Account Page Layouts

See the branches that an account is related to by adding the Branch Unit Customer related list to the Account and Person Account page layouts.

**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.

SEE ALSO:

[Salesforce Help: Add Branch Unit Customer Related List to the Account Page Layout](#)

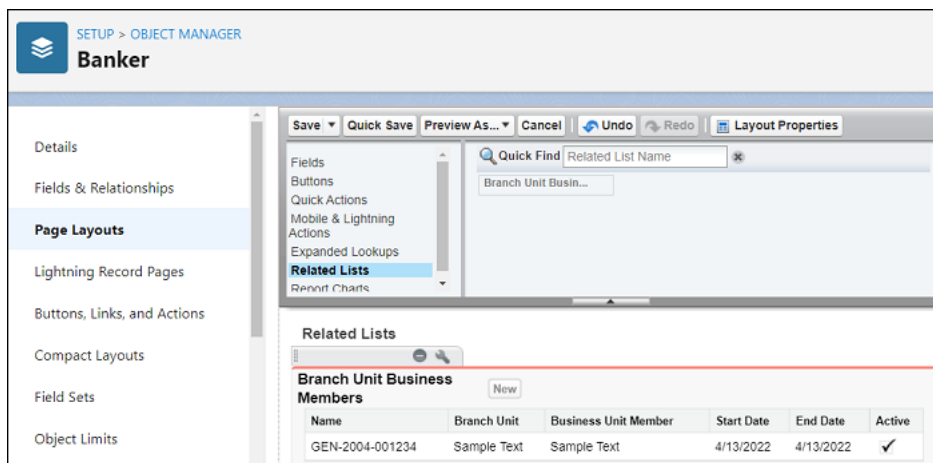
## View Bankers' Branch Assignments at a Glance

To see the branches that a banker is assigned to, add the Branch Unit Business Member related list to the Banker record page. Create reports that show the branches a banker is assigned to by customizing the UserOrContactID field on the banker object using custom formulas and then filtering by My Branch.

**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.

**How:** In Object Manager, select the Banker object, and then click **Page Layouts**. Add the Branch Unit Business Member related list to the page layout.



SEE ALSO:

[Branch Management: Create Banker Records](#)

[Build a Formula Field](#)

## Customize the Branch Unit Related Record Object

Branch Unit Related Record is now a customizable object. The Branch Unit Related Record lets you track data about the records that are created at your branch, such as the name of the branch that created the record, who created it, and the association criteria that triggered the record creation.

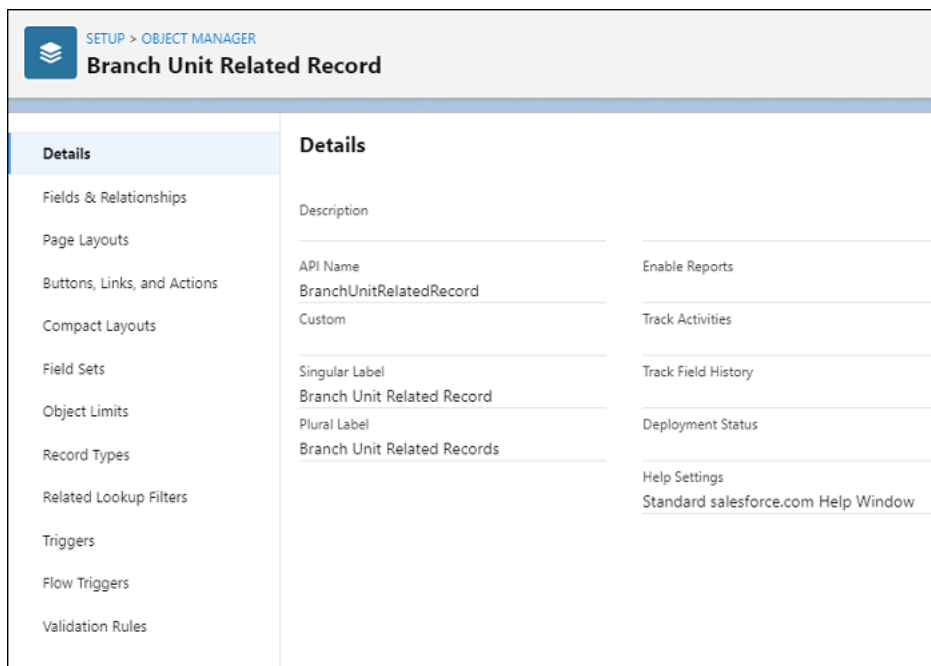
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**Why:** Previously, branch unit related records were created using the record association builder process only when association criteria was met. Now you can create branch unit related records to track operational data about your branch anytime.

As a customizable object, create custom fields and triggers to track record data that is most relevant to your branch. For example, to track and report on who is the manager at a branch anytime a new lead is created, create a custom field on the branch unit related record and a trigger that updates that field based on the branch manager name from the branch unit.

**How:** In Object Manager, search for Branch Unit Related Record to customize the record page.



SEE ALSO:

[Branch Management: Measure Performance with Branch Reportable Objects](#)

## Do More with the Branch Selector

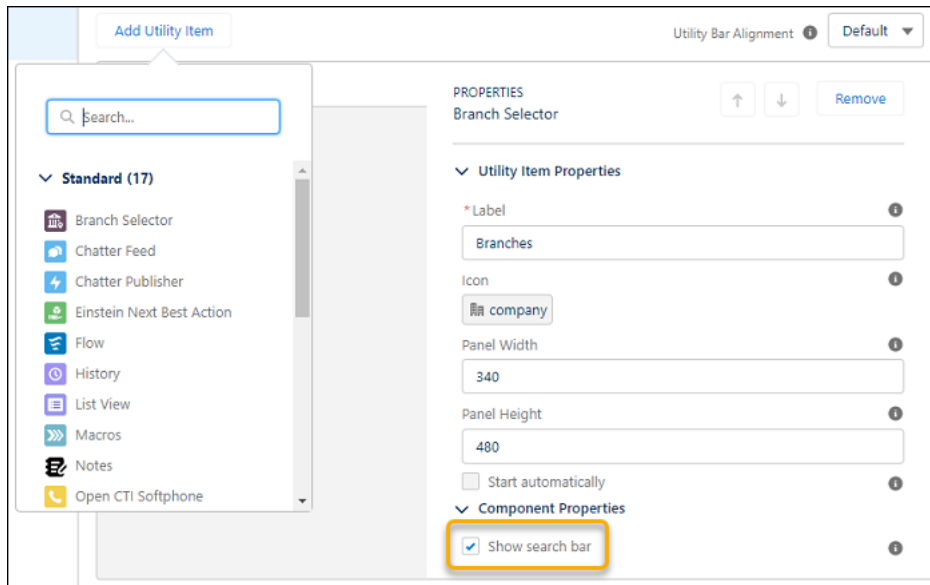
To associate customer interactions with the correct branch, users can now view branch details, search for, add, and remove branches from the Branch Selector without contacting their Salesforce admin.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

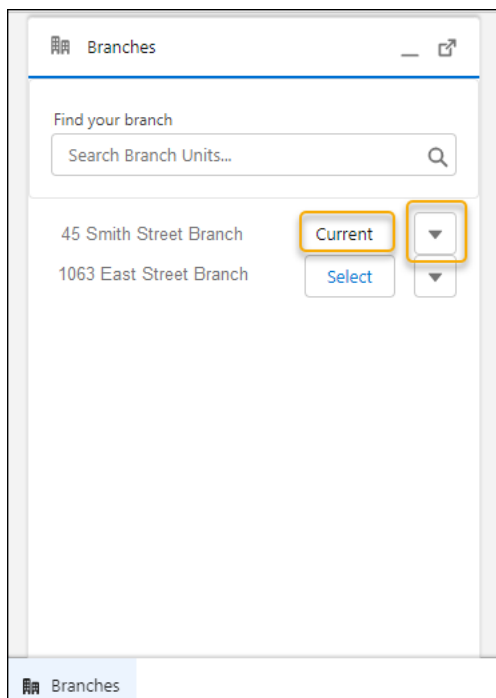
**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** To update the Branch Selector utility bar component, in App Manager, select **Show search bar**.





Your users can view their current branch, branch details, search for, add, and remove branches in the branch selector.



SEE ALSO:

[Branch Management: Choose Your Current Branch with the Branch Selector](#)

[Salesforce Help: Add the Branch Selector Component to Apps](#)

## Record Rollup

Update records silently when record rollup logic updates the household field on a record.

## IN THIS SECTION:

[Update Records Silently](#)

Now you can update records silently when record rollup logic updates the household field on a record. When enabled, records are updated without updating the Last modified by and Last modified date fields.

## Update Records Silently

Now you can update records silently when record rollup logic updates the household field on a record. When enabled, records are updated without updating the Last modified by and Last modified date fields.

**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:** When update records silently is turned on, it prevents any of your business logic from being triggered based on the household field being updated by Financial Services Cloud record rollup logic.

**How:** In Custom Settings, select **Update Records Silently** when configuring record roll up.

The screenshot shows the 'Custom Settings' page in Salesforce, specifically the 'Record Rollup Configuration Edit' section. The page has a header with a gear icon and the word 'SETUP'. Below the header, the title 'Record Rollup Configuration Edit' is displayed, followed by a note: 'Provide values for the fields you created. This data is cached with the application.' The main content area is titled 'Edit Record Rollup Configuration' and includes buttons for 'Save', 'Save & New', and 'Cancel'. Below this is a section titled 'Record Rollup Configuration Information' containing the following fields:

- Name: A text input field with a red error bar and an information icon.
- Settings Active: A checkbox that is currently unchecked.
- Object Api Name: A text input field with a red error bar.
- Batch Size: A text input field containing the value '200'.
- Rollup End Date: A date-time picker showing '4/14/2022, 4:31 AM'.
- Rollup Start Date: A date-time picker showing '4/14/2022, 4:31 AM'.
- Skip Triggers: A checkbox that is checked.
- Skip Unchanged Household Updates: A checkbox that is unchecked.
- Update Records Silently: A checkbox that is unchecked, highlighted with a yellow box.

## SEE ALSO:

[Record Rollup: Define Rollup Settings for Objects](#)

## Compliant Data Sharing

Compliant data sharing is now available for custom objects.

### IN THIS SECTION:

#### [Share Custom Object Records](#)

Compliant data sharing is now available for custom objects. Use the new Participants object to configure advanced data-sharing rules to share custom object records in a compliant manner.

## Share Custom Object Records

Compliant data sharing is now available for custom objects. Use the new Participants object to configure advanced data-sharing rules to share custom object records in a compliant manner.

**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.

### SEE ALSO:

[Common Capabilities in Financial Services Cloud: Compliant Data Sharing](#)

## Dynamic Dashboard

License changes for dynamic dashboards.

### IN THIS SECTION:

#### [Prepare for Dynamic Dashboard Limit Changes](#)

Each Financial Services Cloud org includes 10 licenses for dynamic dashboards, which are in addition to the number provided in your Salesforce edition. Previously, dynamic dashboard licenses were provisioned incorrectly.

## Prepare for Dynamic Dashboard Limit Changes

Each Financial Services Cloud org includes 10 licenses for dynamic dashboards, which are in addition to the number provided in your Salesforce edition. Previously, dynamic dashboard licenses were provisioned incorrectly.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**When:** The new dynamic dashboard limit is effective beginning June 14, 2022.

**Who:** Users need the Financial Services Cloud Extension permission set to use this feature.

**How:** After this date, if your org doesn't have sufficient licenses for your active dynamic dashboards, they'll no longer be editable until you are within your license limit. You can delete dynamic dashboards to be within the licensed limit or purchase additional dynamic dashboard add-ons. Contact your account team to review your provisioned licenses and get additional information.

### SEE ALSO:

[Reports and Dashboards Limits, Limitations, and Allocations](#)

## Financial Services Cloud Community Licenses

Changes to Financial Services Cloud permission set licenses and add-ons.

### IN THIS SECTION:

[Prepare for Community License Changes](#)

Community Financial Services Cloud permission set licenses and add-ons are changing.

## Prepare for Community License Changes

Community Financial Services Cloud permission set licenses and add-ons are changing.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Who:** Users who are using Financial Services Cloud in Experience Cloud.

**Why:** Financial Services Cloud for communities licenses have a distinct add-on and permission set license for each version so that we can add new capabilities for each version individually. This change affects all the member and login licenses for Customer Communities for Financial Services, Customer Communities Plus for Financial Services, and Lightning External Apps for Financial Services.

The changes don't impact existing capabilities, and relevant permissions are carried over to the new permission set licenses and add-ons.

**How:** Reassign the new permission set licenses to your users. If you use the original permission set license name in any code or business logic, you must update the logic to use the new name. You have until Winter '23 to make the changes. The original Financial Services Cloud Community add-on will be removed in Winter '23.

### SEE ALSO:

[Add-Ons for Financial Services Cloud: Financial Services Cloud Experience Cloud](#)

## Insurance for Financial Services Cloud

Use the new dashboards for Insurance Claims and Policy Analytics to analyze distributors' performance and identify opportunities to upsell or cross-sell policies. Get predictive insights on the likelihood of policy renewals faster with the new Policy Renewal Prediction app.

### IN THIS SECTION:

[Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics](#)

With the Insurance Claims and Policy Analytics app, you can get actionable insights to track your distributor's performance and identify new business opportunities to boost your revenue. Use the analytics data to easily track the performance of your agents and distributors based on key metrics such as GWP, Renewal Rate, Policy Count, and Loss Ratio. You can also analyze your distributor's Book of Business to monitor performance and identify opportunities to upsell or cross sell policies.

[Maximize Policy Renewals with Policy Renewal Prediction App](#)

Use the Policy Renewal Prediction app to get insights on the likelihood of policy renewals and devise strategies to retain customers. The Likelihood of Policy Renewal dashboard gives predictions that help you focus on policies with high gross written premium and low renewal probability.

[View Inactive Policies on the Policies 360 Component](#)

Use the **Show only inactive policies** toggle button to view inactive policies for a person account.

## Enhance Claims Management and Policy Administration with Insurance Claims and Policy Analytics

With the Insurance Claims and Policy Analytics app, you can get actionable insights to track your distributor's performance and identify new business opportunities to boost your revenue. Use the analytics data to easily track the performance of your agents and distributors based on key metrics such as GWP, Renewal Rate, Policy Count, and Loss Ratio. You can also analyze your distributor's Book of Business to monitor performance and identify opportunities to upsell or cross sell policies.

**Where:** This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, and Unlimited Editions where Financial Services Cloud is enabled and Vlocity Insurance is installed.

**Who:** To create an app from the Insurance Claims and Policy Analytics template, you need the FSCAnalyticsPlus add-on license.

**How:** Go to Tableau CRM Analytics Studio, and then create your app by using the Insurance Claims and Policy Analytics template.

## Maximize Policy Renewals with Policy Renewal Prediction App

Use the Policy Renewal Prediction app to get insights on the likelihood of policy renewals and devise strategies to retain customers. The Likelihood of Policy Renewal dashboard gives predictions that help you focus on policies with high gross written premium and low renewal probability.

**Where:** This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud is enabled and Vlocity Insurance is installed.

**Who:** To create an app from the Policy Renewal Prediction template, you need the FSC Analytics Plus add-on license.

**How:** Go to Tableau CRM Analytics Studio, and then create your app by using the Policy Renewal Prediction template.

## View Inactive Policies on the Policies 360 Component

Use the **Show only inactive policies** toggle button to view inactive policies for a person account.

**Where:** Available in Lightning Experience in Enterprise, Professional, and Unlimited Editions that have Financial Services Cloud enabled.

**Why:** Your users can quickly view inactive policies associated with a customer using the **Show inactive policies** toggle button. The default state of this toggle button is **disabled**. Active policies show unless a user enables it.

## New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

### Insurance

**Capture a snapshot of statistics about eligible members (employees or members) of a group (employer or association) and their legal dependents.**

Use the new GroupCensus object.

**Capture personal information about a member, and estimate the insurance plan cost for the group.**

Use the new GroupCensusMember object.

**Classify group members based on the benefits received.**

Use the new GroupClass object.

**Capture employer or group contributions for GroupClass members and their dependents on a per product category.**

Use the new GroupClassContribution object.

**Capture insurance-specific contract information.**

Use the new InsuranceContract object.

**Capture a set of plans as part of the contract between the insurance carrier and the group.**

Use the new ContractGroupPlan object.

**Associate a GroupCensusMember record with a ContractGroupPlan record.**

Use the new GroupCensusMemberPlan object.

**Associate a Quote Line Item to a GroupClass record.**

Use the new QuoteLineItemGroupClass object.

**Model a user who is a part of the claim team.**

Use the new ClaimTeamMember object.

**Capture the details of an insurance policy transaction.**

Use the new InsPolicyTransactionDetail object.

## Compliant Data Sharing

**Share custom object records in a compliant manner.**

Use the new CustomObjectParticipant object.

## Branch Management

**Customize Branch Unit Related Record**

BranchUnitRelatedRecord is now a customizable object.

## REST API

Financial Services Cloud REST API includes enhanced calls.

## Record Alerts

**Retrieve active bulk record alerts for financial accounts**

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `financialAccountIds`

New response body: Record Alert Collection Map

**Retrieve active bulk record alerts for person accounts**

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `personIds`

New response body: Record Alert Collection Map

## New Financial Services Cloud Metadata Types

Make the most of the changed metadata types of Financial Services Cloud.

### Metadata Types

**View object hierarchies and record details using relationship graphs**

Use the new RelationshipGraphDefinition metadata type.

**Store the questions required for an assessment (Beta)**

Use the new AssessmentQuestion metadata type.

**Store the assessment questions (Beta)**

Use the new AssessmentQuestionSet metadata type.



**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](#).

**Settings****Enable custom sharing rules for and deletion of document checklist items**

Use the new DocumentChecklistSettings metadata type.

**New Tooling API Objects in Financial Services Cloud**

Use Tooling APIs to work with Financial Services Cloud objects.

**View object hierarchies and record details using relationship graphs**

Use the new RelationshipGraphDefinition object.

**Health Cloud**

Health Cloud brings you even closer to your patients and salespeople with new visual displays and data management tools. Define a unified health profile for patients and track their health scores. Let sales reps know when products are expiring. Create interactive timelines to provide a holistic view of patients' health information. Map more fields from forms and documents to Salesforce records and create Document Checklist Items automatically. Set up identity verification faster with the setup assistant, use external data to perform identity verification, and translate custom field labels. Monitor medication reviews in the medication list, and let users reconcile medications in Experience Cloud. Add more details about care requests with Utilization Management's data model changes and API updates. Use two new dashboards to manage patients' medication use.



**Note:** For information about [Discovery Framework](#) on page 438 and other features that are available in Health Cloud as well as other Salesforce Industries clouds, check out [Industries Common Components](#) on page 431.

**IN THIS SECTION:**[Unified Health Scoring](#)

Help your users get a holistic view of their patients' health profiles using the new Unified Health Scoring feature in Health Cloud. This multidimensional view helps your users plan their interventions better for improved health outcomes, greater patient engagement, and reduced healthcare costs.

[Medication Management](#)

Perform medication reconciliation more efficiently with the help of UI enhancements and access to Medication Reconciliation objects in Experience Cloud sites. Care coordinators can now view the list of medications that are reviewed or are pending review, and add notes for each medication under review.

[Identity Verification](#)

A call center agent (CCA) can now verify both a customer and their authorized representative before processing requests involving sensitive information. Store the details of an interaction, such as what the interaction was about and who participated, which you can represent on a timeline. Suppose a customer is following up on an issue. After verifying the customer, the CCA can learn about the past call (such as what it was about and the status of the request) from the timeline. Do more with new custom flow screen components. Also, verify caller identity based on data in external systems, and provide translations of any custom identity verification fields. Also, the new setup assistant makes it faster and easier to get Identity Verification up and running.

### Intelligent Sales Enhancements

We've enhanced Intelligent Sales to give your sales reps new features and an improved experience with our app. Intelligent Sales now lets your sales reps know when they have inventories expiring in the near future. The mobile app also has a brand new home page.

### Promote Holistic Care of Patients with Timeline

A Timeline is an interactive component that shows key events from a patient's medical and developmental history in a chronological order. It acts as a single source of truth for both the patient and their practitioner. With Timeline, patients don't have to carry paper documents to their appointments. Also, practitioners don't have to wade through multiple medical files to assess patients' care needs or to give proper diagnoses.

### Advanced Patient Card

With Advanced Patient Cards—powered by Flexcards—your users have a new way to view patient addresses, demographic information, and more. And soon you'll be able to customize Advanced Patient Cards.

### Enable Guest Users to Schedule Their Own Appointments

The improved self-scheduling flow now lets guest users (patients without an account on your Experience site) conveniently schedule and manage appointments and view their benefits information from the Experience site.

### Analyze Patients' Medication Patterns with Healthcare Analytics

Create highly effective healthcare plans and programs for your users using data derived from two new dashboards. With the Medication Management dashboard, your users can gain insights into their patient's medication adherence patterns, medication distribution details, and health conditions. With the Medication Analysis embedded dashboard, your users can quickly compare the care plans and medications of patients with similar health conditions.

### Candidate Patient Object Is No More

The Candidate Patient custom object is being retired. Users are no longer able to create new records in this object. Consider using Lead instead.

### Utilization Management Updates

Add more information about care requests with Utilization Management's data model updates and API changes. The Care Request Extension object includes new fields for identifying requesting providers and servicing providers as healthcare provider records. Users can also capture the documentation status of care requests, and add units of measure associated with a care request. The Care Services Post and Get APIs have enhancements to update and retrieve details of the new fields.

### Replacing the EHR Data Model with the Clinical Data Model

Starting with the Winter '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart objects in the FHIR R4-aligned Clinical data model. Future development in Health Cloud will be built on the Clinical data model and won't use the packaged objects in the EHR data model.

### Objects in the Clinical Data Model have Updated Sharing Options

You now have more options when deciding how records created in the Clinical data model are shared with your users.

### Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

### New and Changed Invocable Action in Health Cloud

Use the changed invocable action in Health Cloud.

### Health Cloud Has New Metadata Types

Make the most of Health Cloud with the new Metadata Types for Unified Health Scoring and Timeline Configuration.

### Connect REST API

Update a patient's medication statement, create or update care services review requests, create or update Salesforce records using Intelligent Document Automation, and retrieve or synchronize the patient's health scores from Salesforce Customer Data Platform using Connect REST API.



### [HealthCloudExt Namespace](#)

The `HealthCloudExt` namespace has these new classes, methods, interfaces, enums, or exceptions.

## Unified Health Scoring

Help your users get a holistic view of their patients' health profiles using the new Unified Health Scoring feature in Health Cloud. This multidimensional view helps your users plan their interventions better for improved health outcomes, greater patient engagement, and reduced healthcare costs.

Define what this unified health profile looks like for your organization by configuring the score categories and subcategories that matter to your users. Calculate scores for these categories and subcategories using the Salesforce Customer Data Platform. Set up contextual actions that prompt your users to intervene at the right time based on their patients' scores. Use a patient's score history and action log to perform your own analytics and plan their care better.



**Important:** The use of certain sensitive data such as age, gender identity, or race, as well as others in the calculation of a Unified Health Score may introduce bias into your scores and predictions. We suggest you select these attributes thoughtfully, consistent with your organization's best practices for bias mitigation.

### IN THIS SECTION:

#### [Define a Unified Health Profile for Your Organization's Patients](#)

Every organization has its own distinct way of viewing its patients. Your users look at their patients from multiple perspectives to plan their care and achieve better health outcomes and greater patient engagement. You can use the objects in the Unified Health Scoring data model to define a unified health profile for your patients that meets the needs of your organization.

#### [Calculate Scores for Patients Using the Salesforce Customer Data Platform](#)

Having the right scores for a patient's unified health profile and its subcategories helps your users understand their patients' health better. This information enables your users to better plan their patients' care, leading to improved patient outcomes, reduced healthcare costs, and greater patient engagement.

#### [Identify Patients that Need Immediate Care using the Score List for Unified Health Scoring Lightning Component](#)

Give your users a comprehensive view of all their patients and their unified health scores using the Score List for Unified Health Scoring component.

#### [Understand Patients Better with the Score Details For Unified Health Scoring Lightning Component](#)

Give your users a detailed view of a patient's score change over time and score breakdown using the Score Details for Unified Health Scoring component. This information helps your users plan more effective care strategies for their patients, leading to improved patient outcomes and higher engagement.

#### [Suggest Score-Based Contextual Actions with the Dynamic Actions For Unified Health Scoring Lightning Component](#)

Help your users provide more targeted care for their patients by configuring actions that are visible based on a patient's scores. Use the Dynamic Actions for Unified Health Scoring component to add actions and set their visibility rules. These actions then prompt your users to intervene when your standardized intervention criteria is met for their patients, helping them manage their patients easier.

### [Analyze Action Logs to Understand Health Outcome Trends](#)

Every action triggered from the Dynamic Actions for Unified Health Scoring component is logged in the Health Score Action Log object. Your users can analyze these logs to understand how patients' health scores respond to different types of interventions. This information can help your organization take corrective measures in intervention strategies to improve overall health outcomes and engagement levels.

#### SEE ALSO:

[Administer Health Cloud: Unified Health Scoring](#)

## Define a Unified Health Profile for Your Organization's Patients

Every organization has its own distinct way of viewing its patients. Your users look at their patients from multiple perspectives to plan their care and achieve better health outcomes and greater patient engagement. You can use the objects in the Unified Health Scoring data model to define a unified health profile for your patients that meets the needs of your organization.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**Why:** Defining a unified health profile for your organization with the right categories and subcategories provides your users with a systematic view of all the different factors that contribute to their patients' health. This information helps your users strategize their intervention to maximize health outcomes and patient engagement.

**How:** Use the Score Category object to define a category and its subcategories for a unified health profile. Use the Score Range Classification object to define how scores are interpreted for each category and subcategory.

#### SEE ALSO:

[Administer Health Cloud: Unified Health Profile](#)

## Calculate Scores for Patients Using the Salesforce Customer Data Platform

Having the right scores for a patient's unified health profile and its subcategories helps your users understand their patients' health better. This information enables your users to better plan their patients' care, leading to improved patient outcomes, reduced healthcare costs, and greater patient engagement.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**Why:** You can use the Salesforce Customer Data Platform to run Calculated Insights on your Health Cloud data and derive scores for your patients' unified health profile and its subcategories.

**How:** Connect your Salesforce Customer Data Platform org with your Health Cloud org and install the Unified Health Scoring data kit managed package to import Health Cloud data. Configure Calculated Insights in the Salesforce Customer Data Platform with your own business logic to derive scores for categories and subcategories. Map those Calculated Insights to your categories and subcategories using the Score Category Calculated Insight object. And finally, use our sync API with Apex Scheduler and your custom logic to seamlessly import scores from Calculated Insights into the Unified Health Scoring data model at scheduled intervals.

#### SEE ALSO:

[Administer Health Cloud: Unified Health Scoring and the Salesforce Customer Data Platform](#)

## Identify Patients that Need Immediate Care using the Score List for Unified Health Scoring Lightning Component

Give your users a comprehensive view of all their patients and their unified health scores using the Score List for Unified Health Scoring component.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**Why:** This component shows your users a list of their patients, their current scores, previous scores, and the degree of score change. Your users can use this information to determine which of their patients need immediate attention.

**How:** Use the Lightning App Builder to create a home page for your users and add the Score List for Unified Health Scoring component to that page. Then configure the component to select the score category that represents your unified health profile.

SEE ALSO:

[Administer Health Cloud: Unified Health Scoring Components](#)

[Administer Health Cloud: Configure the Score List for Unified Health Scoring Component](#)

## Understand Patients Better with the Score Details For Unified Health Scoring Lightning Component

Give your users a detailed view of a patient's score change over time and score breakdown using the Score Details for Unified Health Scoring component. This information helps your users plan more effective care strategies for their patients, leading to improved patient outcomes and higher engagement.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**Why:** This component shows your users the current score, previous score, and subcategory scores for a patient's unified health profile. The component also has a graph that visually represents the patient's score change over a period for the last twelve scores. Users can drill down further to see the various scores and subcategories that contribute to the score of a subcategory.

**How:** Use the Lightning App Builder to add the Score Details for Unified Health Scoring component to Account, Contact, or Lead record pages. Then configure the component to select the score category that represents your unified health profile.

SEE ALSO:

[Administer Health Cloud: Unified Health Scoring Components](#)

[Administer Health Cloud: Configure the Score Details for Unified Health Scoring Component](#)

## Suggest Score-Based Contextual Actions with the Dynamic Actions For Unified Health Scoring Lightning Component

Help your users provide more targeted care for their patients by configuring actions that are visible based on a patient's scores. Use the Dynamic Actions for Unified Health Scoring component to add actions and set their visibility rules. These actions then prompt your users to intervene when your standardized intervention criteria is met for their patients, helping them manage their patients easier.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**How:** Use the Lightning App Builder to add the Dynamic Actions for Unified Health Scoring component to Account, Contact, or Lead record pages. Then add actions to the component and configure their visibility rules.

SEE ALSO:

[Administer Health Cloud: Unified Health Scoring Components](#)

[Administer Health Cloud: Configure the Dynamic Actions for Unified Health Scoring Component](#)

## Analyze Action Logs to Understand Health Outcome Trends

Every action triggered from the Dynamic Actions for Unified Health Scoring component is logged in the Health Score Action Log object. Your users can analyze these logs to understand how patients' health scores respond to different types of interventions. This information can help your organization take corrective measures in intervention strategies to improve overall health outcomes and engagement levels.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud and Unified Health Scoring licenses.

**How:** In case your organization needs different information in action logs, you can use our Apex Interface to customize the logged information.

SEE ALSO:

[Administer Health Cloud: Unified Health Scoring Components](#)

## Medication Management

Perform medication reconciliation more efficiently with the help of UI enhancements and access to Medication Reconciliation objects in Experience Cloud sites. Care coordinators can now view the list of medications that are reviewed or are pending review, and add notes for each medication under review.

IN THIS SECTION:

[Provide Site User Access to Medication Reconciliation Objects](#)

Care coordinators and providers can now access Medication Reconciliation objects in Experience Cloud with the new Medication Management for Experience Cloud Sites permission set. The permission set also includes the **Use objects in the Medication Management data model via Experience Cloud sites** user permission, which helps users create, read, and edit records of Medication Reconciliation objects in Experience Cloud sites.

[View the Review Status of Medications in Medication Reconciliation](#)

Easily find and review the status of medications in one consolidated list on the Medication Reconciliation tab. Also, use the new Notes subtab to add comments for each medication.

[Display Selected Tabs in the Patient Medication Manager](#)

Help providers and care coordinators quickly find the information they need by configuring the Patient Medication Manager to display specific tabs.

[Medication Management Features Have Been Rebranded](#)

As of March 2022, Medication List, which was formerly referred to as Medication Management, is renamed Medication Review. Medication Reconciliation is now a part of Medication Management, and is accessed through the Medication Management Add-On license.

## Provide Site User Access to Medication Reconciliation Objects

Care coordinators and providers can now access Medication Reconciliation objects in Experience Cloud with the new Medication Management for Experience Cloud Sites permission set. The permission set also includes the **Use objects in the Medication Management data model via Experience Cloud sites** user permission, which helps users create, read, and edit records of Medication Reconciliation objects in Experience Cloud sites.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Medication Management Add-On license where person accounts are enabled.

**Who:** This feature is available to users who are assigned the new Medication Management for Experience Cloud Sites permission set, the Health Cloud for Experience Cloud Sites permission set license, and the Health Cloud Medication Reconciliation platform license.

**How:** From Setup, go to Permission Sets, and select **Medication Management for Experience Cloud Sites**. Select **Manage Assignments**, and then select **Add Assignments**. Select the site users you want to provide access to and then select **Assign**. Site users can then view, create, and edit records of Medication Reconciliation, Medication Reconciliation Recommendation, and Medication Reconciliation Statement Recommendation objects.

SEE ALSO:

[Administer Health Cloud: Medication Management](#)

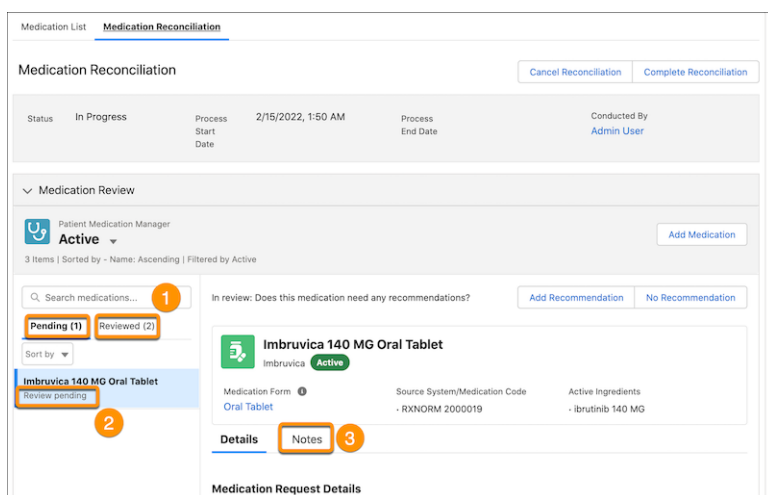
## View the Review Status of Medications in Medication Reconciliation

Easily find and review the status of medications in one consolidated list on the Medication Reconciliation tab. Also, use the new Notes subtab to add comments for each medication.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Medication Management Add-On license where person accounts are enabled.

**Who:** This feature is available to users who are assigned the Health Cloud Medication Reconciliation platform license and the Health Cloud Medication Reconciliation permission set license. Admins must also enable the Medication Management admin settings.

**How:** Make sure you enable Notes from Notes Settings in Setup. The pending and reviewed tabs are only available for Active medications.



On the patient medication manager component, there are two new tabs that consolidate the medications under each review status (1). The review status is also listed below each medication (2). Care coordinators can also add notes to each medication (3).

#### SEE ALSO:

[Administer Health Cloud: Enable Medication Management to Perform Medication Reconciliation](#)

[Salesforce Health Cloud Developer Guide Notes: Medication Management](#)

[Administer Health Cloud: Enable Medication Management to Perform Medication Reconciliation](#)

[Administer Health Cloud: Configure Patient Medication Manager for Medication Management](#)

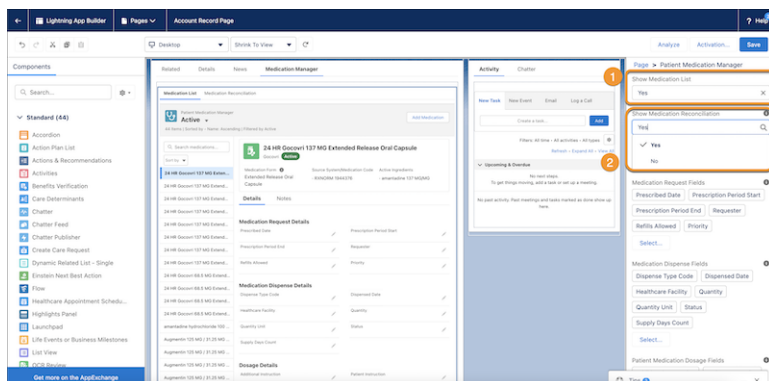
## Display Selected Tabs in the Patient Medication Manager

Help providers and care coordinators quickly find the information they need by configuring the Patient Medication Manager to display specific tabs.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Medication Management Add-On license where person accounts are enabled.

**Who:** This feature is available to users who are assigned the Health Cloud Medication Reconciliation platform license and the Health Cloud Medication Reconciliation permission set license. Admins must also enable the Medication Management admin settings.

**How:** Admins can configure the Patient Medication Manager component in Lightning App Builder.



In the Properties pane, for Show Medication List (1) and Show Medication Reconciliation (2), select Yes or No and save your changes.

#### SEE ALSO:

[Salesforce Health Cloud Developer Guide Notes: Medication Management](#)

[Administer Health Cloud: Enable Medication Management to Perform Medication Reconciliation](#)

[Administer Health Cloud: Configure Patient Medication Manager for Medication Management](#)

## Medication Management Features Have Been Rebranded

As of March 2022, Medication List, which was formerly referred to as Medication Management, is renamed Medication Review. Medication Reconciliation is now a part of Medication Management, and is accessed through the Medication Management Add-On license.

### SEE ALSO:

[Salesforce Release Notes: Medication Review \(Formerly Medication Management\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Release Notes: New: Medication Management Add-On \(can be outdated or unavailable during release preview\)](#)

## Identity Verification

A call center agent (CCA) can now verify both a customer and their authorized representative before processing requests involving sensitive information. Store the details of an interaction, such as what the interaction was about and who participated, which you can represent on a timeline. Suppose a customer is following up on an issue. After verifying the customer, the CCA can learn about the past call (such as what it was about and the status of the request) from the timeline. Do more with new custom flow screen components. Also, verify caller identity based on data in external systems, and provide translations of any custom identity verification fields. Also, the new setup assistant makes it faster and easier to get Identity Verification up and running.

### IN THIS SECTION:

#### [Verify the Identity of Your Customer](#)

The Verify Customer Identity flow template uses configuration information from the Identity Verification Process records to guide contact center agents through the process of verifying a customer's identity. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

#### [Verify the Identity of Your Customer and Their Authorized Representative](#)

A big part of a call center agent's job is to ensure the privacy of their customers. Even if a person is authorized to inquire about the details of a customer, the agent must verify the identities of both people. You have to use the new Verify Customer Identity flow to verify the identity of the representative and the Verify Linked Caller Identity flow to verify the identity of the customer. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

#### [Extend Your Identity Verification Flows with Custom Flow Screen Components](#)

To create an identity verification flow from scratch, you have three new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Customer Identity flow template, these screen components are by default present in the flow.

#### [Use External Data to Verify Caller Identity](#)

Does the data required to verify a caller's identity reside in an external system, outside your Salesforce org? No problem. You can now set up Identity Verification to search an external data source for caller records and verification data.

#### [Translate Custom Field Labels for Global Users](#)

You may need to customize Identity Verification fields to work with your verification process. Use the Translation Workbench to translate Identity Verification field labels that you customize so that call center agents always see those labels in their preferred language.

### [Use Setup Assistant to Get Up and Running with Identity Verification](#)

Set up Identity Verification in a snap with the new setup assistant. All setup steps are now listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

SEE ALSO:

[Health Cloud Administration Guide: Identity Verification](#)

## Verify the Identity of Your Customer

The Verify Customer Identity flow template uses configuration information from the Identity Verification Process records to guide contact center agents through the process of verifying a customer's identity. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This flow template is available to users with the Health Cloud permission set license.

**How:** In Flow Builder, create a new flow using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Finally, make the flow available to agents by adding it to the Engagement Interaction Lightning record page in Lightning App Builder.

SEE ALSO:

[Identity Verification Flows](#)

## Verify the Identity of Your Customer and Their Authorized Representative

A big part of a call center agent's job is to ensure the privacy of their customers. Even if a person is authorized to inquire about the details of a customer, the agent must verify the identities of both people. You have to use the new Verify Customer Identity flow to verify the identity of the representative and the Verify Linked Caller Identity flow to verify the identity of the customer. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This flow template is available to users with the Health Cloud permission set license.

**How:** Create identity verification process setup records, including at least two Identity Verification Process Detail records: one for primary verification and the other for secondary verification. Link the two records using the Linked Identity Verification Process Detail field in the process detail record for primary verification. Next, in Flow Builder, create a new flow using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Finally, make the flow available to agents by adding it to the Engagement Interaction Lightning record page in Lightning App Builder.

SEE ALSO:

[Identity Verification Flows](#)

## Extend Your Identity Verification Flows with Custom Flow Screen Components

To create an identity verification flow from scratch, you have three new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Customer 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.

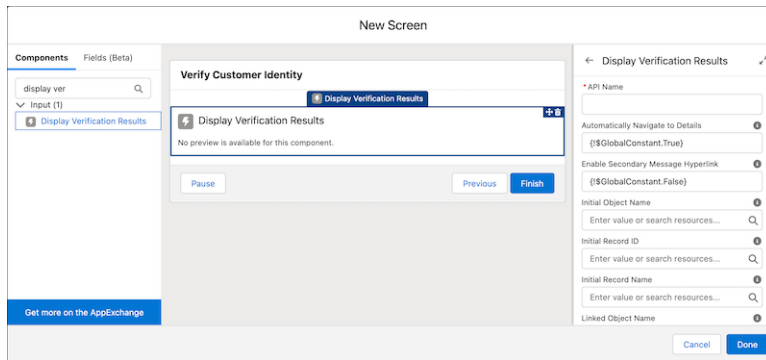
**Why:** Create screen flows that display data in a way that it's easier for your users to search for callers and verify their identity.

- The Search for Customer flow screen component is used to search for callers and customers in Salesforce. This component is available for both primary and secondary verification.
- The Display Search Results flow screen component is used to display the results of searches for callers and customers in Salesforce. This component is available for both primary and secondary verification.
- The Display Verification Results flow screen component is used to display a message to the call center agent indicating that verification was successful. This component is available for both primary and secondary verification.

**How:** In Flow Builder, add a Screen element to your custom flow you're creating or customizing. Select Search for Customer, Display Search Results, or Display Verification Results in the New Screen window, and enter the screen properties.

The screenshot shows the 'New Screen' dialog in Flow Builder. The 'Components' tab is selected, and the 'Search for Customer' component is chosen from the 'Input (1)' list. The component is added to the 'Verify Customer Identity' screen. The right-hand panel shows the configuration for the 'Search for Customer' component, including fields for 'API Name' and 'Verification Context', and expandable sections for 'Set Component Visibility' and 'Advanced'.

The screenshot shows the 'New Screen' dialog in Flow Builder. The 'Components' tab is selected, and the 'Display Search Results' component is chosen from the 'Input (1)' list. The component is added to the 'Verify Customer Identity' screen. The right-hand panel shows the configuration for the 'Display Search Results' component, including fields for 'API Name', 'Keywords', 'Search Criteria', and 'Verification Context', and expandable sections for 'Set Component Visibility' and 'Advanced'.



SEE ALSO:

[Flow Screen Input Component: Search for Customer](#)

[Flow Screen Input Component: Display Search Results](#)

[Flow Screen Input Component: Display Verification Results](#)

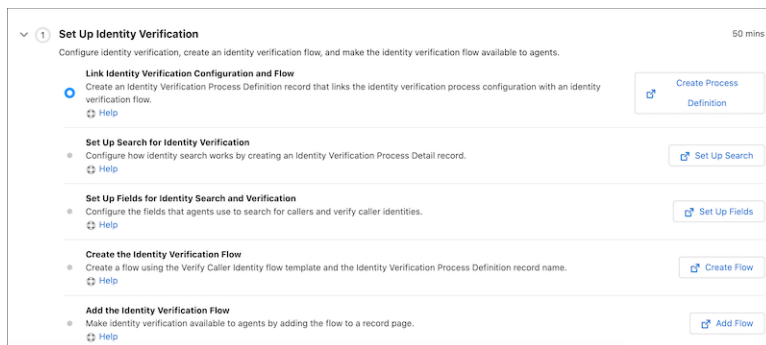
## Use External Data to Verify Caller Identity

Does the data required to verify a caller's identity reside in an external system, outside your Salesforce org? No problem. You can now set up Identity Verification to search an external data source for caller records and verification data.

**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:** Create an Apex class to implement the identity verification process methods for building verification context, searching for caller records, and getting verification data. Then, from Setup, in the Quick Find box, enter *Identity Verification Settings* and then select **Identity Verification Settings**.



Expand Set Up Identity Verification and click **Create Process Definition**. Next, create an Identity Verification Process Definition record. Then, click **Set Up Search** on the Identity Verification Setup page to create an Identity Verification Process Detail record. In the process detail record, set the values of the required fields. Be sure to select **External** as the data source type, and select an Apex class.

Identity Verification Process Detail Edit

SamplePersonAccountSearch

Save Save & New Cancel

Description Information

Label Sample Person Account

Name SamplePersonAccount

Identity Verification Process Sample Verification Flow

Search Sequence Number 1

Data Source Type External

## SEE ALSO:

[Health Cloud Administration Guide: Set up External Data](#)

[Protect Personal Health Information](#)

[Set Up Search for Identity Verification](#)

[Use External Data for Identity Verification](#)

## Translate Custom Field Labels for Global Users

You may need to customize Identity Verification fields to work with your verification process. Use the Translation Workbench to translate Identity Verification field labels that you customize so that call center agents always see those labels in their preferred language.

**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 View Setup and Configuration permission and are designated as translators.

**How:** From Setup, in the Quick Find box, enter *Translate*, and then select **Translate**. Select **Identity Verification Process Custom Field Label** as the setup component and enter values in the Translation column for the custom field labels.

Translation Workbench

Translate

To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comment) to filter for translatable terms.
4. Double click in the translation column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Language French

Setup Component Identity Verification Process Custom Field Label

Master Custom Field Label	Custom Field Label Translation	Out of Date
Data not available for this view		
No records		

Page 1 of 1

## SEE ALSO:

[Translation Workbench](#)

[Enable Translation Workbench](#)

[Set Up Fields for Search and Verification](#)

[Protect Personal Health Information](#)

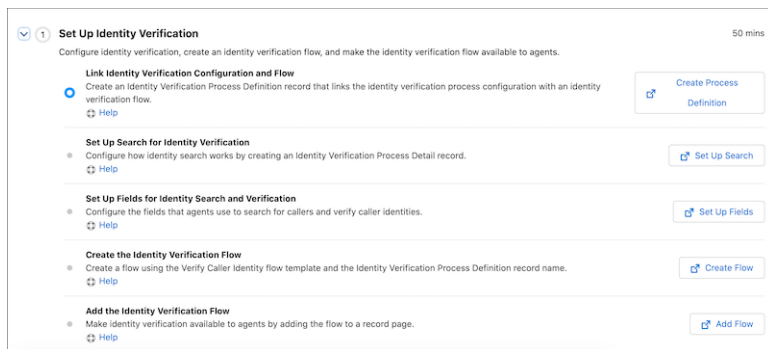
## Use Setup Assistant to Get Up and Running with Identity Verification

Set up Identity Verification in a snap with the new setup assistant. All setup steps are now listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** This feature is available to users who are assigned the Health Cloud permission set license.

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



SEE ALSO:

[Protect Personal Health Information](#)

## Intelligent Sales Enhancements

We've enhanced Intelligent Sales to give your sales reps new features and an improved experience with our app. Intelligent Sales now lets your sales reps know when they have inventories expiring in the near future. The mobile app also has a brand new home page.

IN THIS SECTION:

[Keep Track of Expiring Products](#)

Product expiration is one of the leading causes of inventory write-offs. Knowing when a product is about to expire can help your reps plan their visits to use their inventories better and reduce write-off costs. The new Expiring Products page in the Intelligent Sales mobile app tells your reps about the products, quantities, and serial numbers expiring in the next three months.

[See Upcoming Action Items on the New Mobile App Home Page](#)

Your sales reps can use the new home page on the Intelligent Sales mobile app to see all the information they care about at one place. They can see what visits they're scheduled for, what cycle counts are coming up, and what products are expiring soon.

[Use External Data Sources for Expected Quantities in Cycle Counts](#)

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, you can use our IFetchInventoryCount Apex Interface with your own custom Apex classes and methods.

SEE ALSO:

[Health Cloud Administration Guide: Intelligent Sales](#)

## Keep Track of Expiring Products

Product expiration is one of the leading causes of inventory write-offs. Knowing when a product is about to expire can help your reps plan their visits to use their inventories better and reduce write-off costs. The new Expiring Products page in the Intelligent Sales mobile app tells your reps about the products, quantities, and serial numbers expiring in the next three months.

**Where:** This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** Ensure that the expiration dates for products are recorded in their serialized product records.

SEE ALSO:

[Administer Health Cloud: Introduction to the Intelligent Sales Mobile App](#)

## See Upcoming Action Items on the New Mobile App Home Page

Your sales reps can use the new home page on the Intelligent Sales mobile app to see all the information they care about at one place. They can see what visits they're scheduled for, what cycle counts are coming up, and what products are expiring soon.

**Where:** This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

SEE ALSO:

[Administer Health Cloud: Introduction to the Intelligent Sales Mobile App](#)

## Use External Data Sources for Expected Quantities in Cycle Counts

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, you can use our IFetchInventoryCount Apex Interface with your own custom Apex classes and methods.

**Where:** This change applies to all versions of the mobile app in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** Use the Developer Console to insert the IFetchInventoryCount Apex interface in your Salesforce org along with your custom Apex class and method.

SEE ALSO:

[Administer Health Cloud: External Data Sources for Cycle Counts](#)

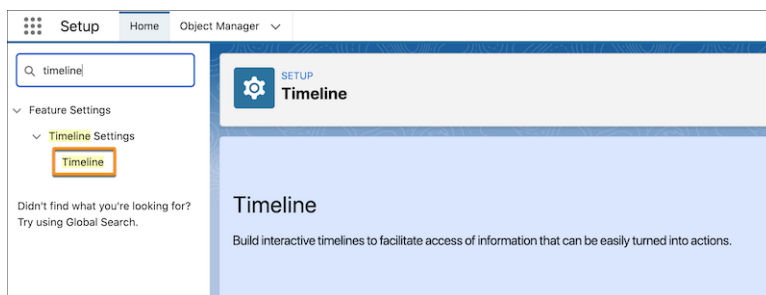
## Promote Holistic Care of Patients with Timeline

A Timeline is an interactive component that shows key events from a patient's medical and developmental history in a chronological order. It acts as a single source of truth for both the patient and their practitioner. With Timeline, patients don't have to carry paper documents to their appointments. Also, practitioners don't have to wade through multiple medical files to assess patients' care needs or to give proper diagnoses.

**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 license.

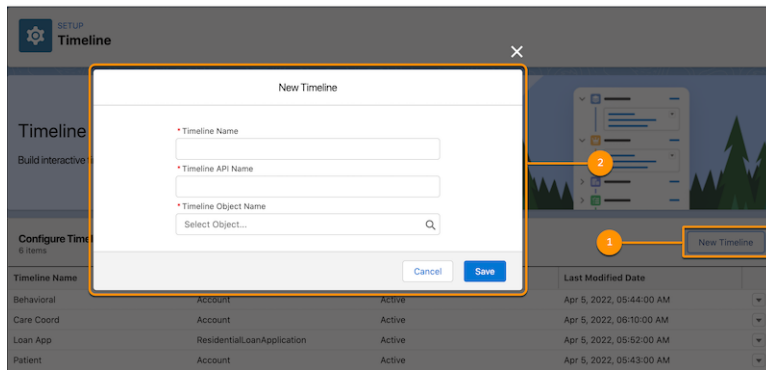
**How:** From Setup, in the Quick Find box, enter *Timeline*, and then select **Timeline**.



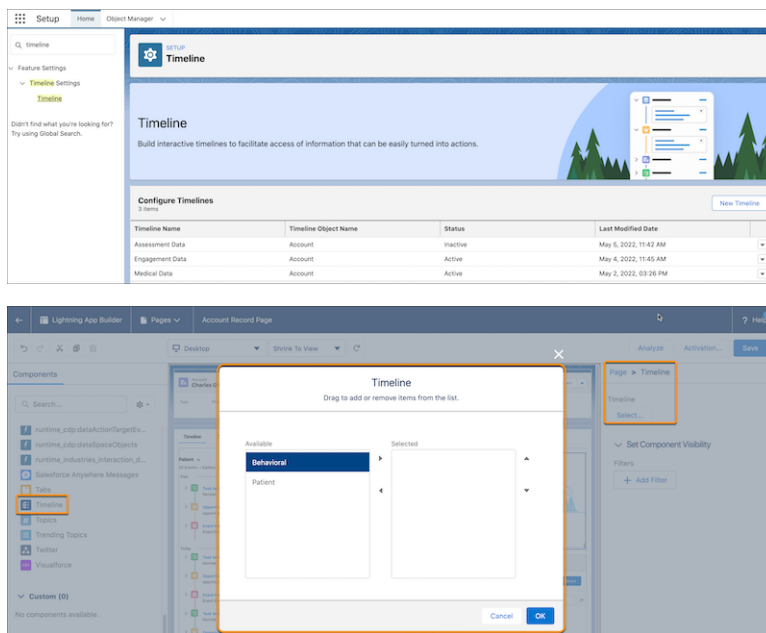
Enable Timeline for your org, and then create your timeline configuration.

 **Note:** After you enable Timeline in your org, you can't disable it.

To create a timeline configuration, click **New Timeline**. Add the primary and the related objects for the timeline. Next, configure the fields to display on the timeline and save the configuration.



Then, embed the Timeline component into the Lightning record page where your users can see the Timeline.



Finally, provide Salesforce and Experience Cloud users access to the timeline. Patients can access the timeline from your Experience Cloud site.

The top screenshot displays the 'Timeline' tab for patient Charles Green. It shows a vertical timeline with several events. The first event, CE-0004, is an 'Emergency' visit on March 16, 2022. Other events include CE-0007 (Ambulatory, April 4, 2022), CE-0003 (Emergency, April 20, 2022), and CE-0006 (Emergency, May 2, 2022). There are also scheduled visits on April 20 and April 27, 2022, and a COVID-19 event on May 2, 2022.

The bottom screenshot provides a detailed view of the CE-0004 event. It shows the start date as 3/16/2022 at 4:00 PM, categorized as an 'Emergency' visit. The admission source is the 'Emergency Department' and the name is 'CE-0004'. Below this, there are sections for 'Allergy Intolerances' and 'Clinical Encounters', both of which currently show zero items.

SEE ALSO:

[Provide Holistic Patient Care with Enhanced Timeline](#)

## Advanced Patient Card

With Advanced Patient Cards—powered by Flexcards—your users have a new way to view patient addresses, demographic information, and more. And soon you'll be able to customize Advanced Patient Cards.

**Where:** This feature is available in Lightning Experience in Enterprise and Unlimited editions where Health Cloud and OmniStudio are enabled.

**Who:** This feature is available to all users who are assigned the Health Cloud license.

**How:** Drag the Flexcard component on to your Account Record page and set the Flexcard to the Advanced Patient Card.

SEE ALSO:

[Health Cloud Administration Guide: Patient Cards](#)

[Salesforce Admin Guide: Advanced Patient Card \(can be outdated or unavailable during release preview\)](#)

## Enable Guest Users to Schedule Their Own Appointments

The improved self-scheduling flow now lets guest users (patients without an account on your Experience site) conveniently schedule and manage appointments and view their benefits information from the Experience site.

**Who:** This feature is available to users with the Customer Community Plus for Health Cloud and Customer Community for Health Cloud add-on licenses and the Health Cloud Appointment Self-Service permission set.

**Why:** Simplify the process for new patients who don't have accounts that want to schedule appointments on your Experience site. The improved self-scheduling flow lets guest users (patients without Experience site accounts) schedule and manage appointments, and view their benefits information directly from the Experience site.

**How:** Add the OmniScript component to your Experience site and then add the pre-built OmniStudio workflow to the OmniScript component.

SEE ALSO:

[Administer Health Cloud: Use Self-Scheduling Workflows on Your Experience Site](#)

## Analyze Patients' Medication Patterns with Healthcare Analytics

Create highly effective healthcare plans and programs for your users using data derived from two new dashboards. With the Medication Management dashboard, your users can gain insights into their patient's medication adherence patterns, medication distribution details, and health conditions. With the Medication Analysis embedded dashboard, your users can quickly compare the care plans and medications of patients with similar health conditions.

**Where:** This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited editions where Health Cloud is enabled.

**How:** Go to Analytics Studio, and then create your app by using the Analytics for Healthcare template.

## Candidate Patient Object Is No More

The Candidate Patient custom object is being retired. Users are no longer able to create new records in this object. Consider using Lead instead.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**How:** We recommend that you use the Lead object in place of the Candidate Patient object. If your organization needs a field in Candidate Patient that isn't supported by Lead, we recommend creating fields as needed.



## Utilization Management Updates

Add more information about care requests with Utilization Management's data model updates and API changes. The Care Request Extension object includes new fields for identifying requesting providers and servicing providers as healthcare provider records. Users can also capture the documentation status of care requests, and add units of measure associated with a care request. The Care Services Post and Get APIs have enhancements to update and retrieve details of the new fields.

**How:** From the object management settings for the Care Request Extension object, go to Page Layouts, and add the new fields to the Care Request Extension Layout.

SEE ALSO:

[Salesforce Release Notes: Health Cloud Has New and Changed Objects](#)

[Salesforce Release Notes: Changed Connect REST API Request Bodies](#)

[Salesforce Release Notes: Changed Connect REST API Response Bodies](#)

## Replacing the EHR Data Model with the Clinical Data Model

Starting with the Winter '23 release, new customers won't be able to create records in the packaged EHR objects that have counterpart objects in the FHIR R4-aligned Clinical data model. Future development in Health Cloud will be built on the Clinical data model and won't use the packaged objects in the EHR data model.

**Where:** This change applies to Enterprise and Unlimited editions of Salesforce where Health Cloud is enabled.

**How:** We recommend that you use the Clinical data model for your implementation of Health Cloud. You can take a look at the Health Cloud developer guide to find out how objects and fields in the EHR data model map to objects and fields in the Clinical data model.

SEE ALSO:

[Health Cloud Developer Guide: Mapping the EHR Data Model to the Clinical Data Model](#)

## Objects in the Clinical Data Model have Updated Sharing Options

You now have more options when deciding how records created in the Clinical data model are shared with your users.

**Where:** This change applies to Enterprise and Unlimited editions of Salesforce where Health Cloud is enabled.

**When:** July 14, 2022

**Why:** Records created in the Clinical data model that reference patient records as their parent are no longer strictly shared with users that have access to those patient records. Instead, you can decide to explicitly share or hide those records from users, regardless of a user's access to a patient record. The default behavior is to still share these records with users who have access to their parent patient records.

Here's the list of objects that are part of this change:

- Health Condition
- Patient Immunization
- Care Observation
- Clinical Service Request
- Patient Medical Procedure
- Diagnostic Summary
- Allergy Intolerance

- Person Name
- Person Language
- Medication Dispense
- Medication Request
- Medication Statement
- Medication Reconciliation

## Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

### Unified Health Scoring

#### **Store the health score values of a patient**

Use the new `HealthScore` object.

#### **View the log of actions triggered by users**

Use the new `HealthScoreActionLog` object.

#### **Define the related attributes that determine the visibility criteria for actions in the Dynamic Actions for Unified Health Scoring component**

Use the new `ActionVisibility` object.

### Medication Management

#### **Store information about a detected issue resulting from a clinical activity**

Use the new `ClinicalDetectedIssue` object.

#### **Store additional information about a clinical detected issue**

Use the new `ClinicalDetectedIssueDetail` object.

#### **Specify the primary medical procedure associated with the medication dispensation**

Use the new `PrimaryProcedure` field on the `MedicationDispense` object.

#### **Specify the location where the dispensed medication will be delivered**

Use the new `DeliveryLocation` field on the `MedicationDispense` object.

#### **Specify the contact, account, or a healthcare provider who collected the dispensed medication**

Use the new `CollectedBy` field on the `MedicationDispense` object.

#### **Indicate if a substitute medication was dispensed**

Use the new `IsSubstituted` field on the `MedicationDispense` object.

#### **Specify the type of substitution done for the medication**

Use the new `SubstitutionType` field on the `MedicationDispense` object.

#### **Specify the reason for substituting the medication**

Use the new `SubstitutionReason` field on the `MedicationDispense` object.

#### **Specify the user or healthcare provider who substituted the medication**

Use the new `SubstitutedBy` field on the `MedicationDispense` object.

#### **Specify the primary clinical issue associated with the medication dispensation**

Use the new `PrimaryDetectedIssue` field on the `MedicationDispense` object.

**Specify the clinical issue that resulted in the status of the medication dispensation**

Use the new `StatusReasonRelatedIssue` field on the `MedicationDispense` object.

**Specify the medication dispensation associated with a patient medication dosage**

Use the updated `ParentRecordID` field in the `PatientMedicalDosage` object.

**Specify the medication dispensation carried out by a care performer**

Use the updated `ParentRecordID` field in the `CarePerformer` object.

**Specify the user who provided a service as a care performer**

Use the updated `PersonID` field in the `CarePerformer` object.

**Specify the type of recipient for an author note**

Use the new `RecipientType` field on the `AuthorNote` object.

**Specify the detected issue associated with the author note**

Use the updated `ParentRecordID` field in the `AuthorNote` object.

**Specify the user who wrote the author note**

Use the updated `Author` field in the `AuthorNote` object.

**Specify the detected issue associated with an identifier record**

Use the updated `ParentRecordID` field in the `Identifier` object.

## Utilization Management

**Specify the unit of measure for the quantity associated with a prior authorization request**

Use the new `UnitofMeasure` field on the `CareRequestExtension` object.

**Specify the provider who requested a prior authorization for a care request**

Use the new `RequestingProvider` field on the `CareRequestExtension` object.

**Specify the provider who provides the service for a care request**

Use the new `ServicingProvider` field on the `CareRequestExtension` object.

**Specify the facility where a patient receives service for a care request**

Use the new `ServicingFacility` field on the `CareRequestExtension` object.

**Specify the status of a clinical document upload**

Use the new `DocumentAttachmentStatus` field on the `CareRequestExtension` object.

## Timeline

**Store the details of a timeline configuration**

Use the `TimelineObjectDefinition` object.

## Intelligent Sales

**See the product quantity projections for visits on different dates**

Use the new `ProductAvailabilityProjection` object.

## FHIR R4-Aligned Data Model

**Store information about a detected issue resulting from a clinical activity**

Use the new `ClinicalDetectedIssue` object.

**Store additional information about a clinical detected issue**

Use the new `ClinicalDetectedIssueDetail` object.

**Specify the primary medical procedure associated with the medication dispensation**

Use the new `PrimaryProcedure` field on the `MedicationDispense` object.

**Specify the location where the dispensed medication will be delivered**

Use the new `DeliveryLocation` field on the `MedicationDispense` object.

**Specify the contact, account, or a healthcare provider who collected the dispensed medication**

Use the new `CollectedBy` field on the `MedicationDispense` object.

**Indicate if a substitute medication was dispensed**

Use the new `IsSubstituted` field on the `MedicationDispense` object.

**Specify the type of substitution done for the medication**

Use the new `SubstitutionType` field on the `MedicationDispense` object.

**Specify the reason for substituting the medication**

Use the new `SubstitutionReason` field on the `MedicationDispense` object.

**Specify the user or healthcare provider who substituted the medication**

Use the new `SubstitutedBy` field on the `MedicationDispense` object.

**Specify the primary clinical issue associated with the medication dispensation**

Use the new `PrimaryDetectedIssue` field on the `MedicationDispense` object.

**Specify the clinical issue that resulted in the status of the medication dispensation**

Use the new `StatusReasonRelatedIssue` field on the `MedicationDispense` object.

**Specify the medication dispensation associated with a patient medication dosage**

Use the updated `ParentRecordID` field in the `PatientMedicalDosage` object.

**Specify the medication dispensation carried out by a care performer**

Use the updated `ParentRecordID` field in the `CarePerformer` object.

**Specify the user who provided a service as a care performer**

Use the updated `PersonID` field in the `CarePerformer` object.

**Specify the type of recipient for an author note**

Use the new `RecipientType` field on the `AuthorNote` object.

**Specify the detected issue associated with the author note**

Use the updated `ParentRecordID` field in the `AuthorNote` object.

**Specify the user who wrote the author note**

Use the updated `Author` field in the `AuthorNote` object.

**Specify the detected issue associated with an identifier record**

Use the updated `ParentRecordID` field in the `Identifier` object.

## Identity Verification

**Store the details of an interaction with a customer or their authorized representative**

Use the new `EngagementInteraction` object.

**Store the details of people who participated in an interaction with a customer or their authorized representative**

Use the new `EngagementAttendee` object.

**Store the details about the subject or topic of an interaction with a customer or their authorized representative**

Use the new `EngagementTopic` object.

**Enable a call center agent to verify a customer after the agent has successfully verified a caller authorized to represent the customer**

Use the new `LinkedIdentityVerificationProcessDetail` field in the `IdentityVerificationProcessDetail` object.

SEE ALSO:

[Utilization Management Updates](#)

[Health Cloud Developer Guide: Timeline Object Definition](#)

## New and Changed Invocable Action in Health Cloud

Use the changed invocable action in Health Cloud.

### Identity Verification

**When a caller is identified based on their registered number, build the identity verification context using the relevant Identity Verification Process Detail record**

Use the new `processDetailName` field in the `buildIdentityVerificationContext` invocable action.

**Store the verified record of a caller who is an authorized representative of a customer**

Use the new `selectedVerifiedResult` field in the `buildIdentityVerificationContext` invocable action.

SEE ALSO:

[Invocable Actions in Health Cloud](#)

## Health Cloud Has New Metadata Types

Make the most of Health Cloud with the new Metadata Types for Unified Health Scoring and Timeline Configuration.

### Unified Health Scoring

**Define categories and subcategories for a unified health profile**

Use the new `ScoreCategory` metadata type.

### Timeline Configuration

**View a Salesforce record's related events in a linear time-sorted view**

Use the new `TimelineObjectDefinition` metadata type.

## Connect REST API

Update a patient's medication statement, create or update care services review requests, create or update Salesforce records using Intelligent Document Automation, and retrieve or synchronize the patient's health scores from Salesforce Customer Data Platform using Connect REST API.

## IN THIS SECTION:

### [Changed Connect REST API Resources](#)

Health Cloud has these changed Connect REST API resources.

### [New Connect REST API Resources](#)

Health Cloud has these new Connect REST API resources.

### [Changed Connect REST API Request Bodies](#)

This request body has changes.

### [Changed Connect REST API Response Bodies](#)

These response bodies have changes.

## Changed Connect REST API Resources

Health Cloud has these changed Connect REST API resources.

### Medication Statements

#### Update a patient's medication statement

Make a PUT request to the

`/connect/health/clinical/patients/{patientId}/medication-statement/{medicationStatementId}` resource.

New request parameter: `medicationStatementId`

New request body: Med Statement Input Payload

New response body: Medication Statement Update Output

### Visits

#### Plan visits for sales representatives

Make a POST request to the new `/connect/general-visit/visits` resource.

New request body: Create Visit Request

New response body: Create Visit Output

#### SEE ALSO:

[Salesforce Health Cloud Developer Guide: Medication Statements](#)(can be outdated or unavailable during release preview)

## New Connect REST API Resources

Health Cloud has these new Connect REST API resources.

### Intelligent Document Automation



**Note:** You need the `IntelligentDocumentAutomation` org permission to use this feature.

#### Create records in Salesforce objects using a document based on a content document record

Make a POST request to the `/connect/form-reader/contentDocuments/{contentDocumentId}/record` resource.

New request body: Document Process Input

New response body: Document Process Output

#### Create records in Salesforce objects using a document based on a received document record

Make a POST request to the `/connect/form-reader/receivedDocuments/{receivedDocumentId}/record` resource.

New request body: Document Process Input

New response body: Document Process Output

#### Split a document and attach a single page or multiple pages from the transformed document to Salesforce objects

Make a POST request to the

`/connect/document-automation/contentDocuments/{contentDocumentId}/linkedObjects/{linkedObjectId}` resource.

New request body: Document Management Input

New response body: Document Management Result

#### Update an existing record in a Salesforce object using a document based on a content document record

Make a POST request to the

`/connect/form-reader/contentDocuments/{contentDocumentId}/record/{targetRecordId}` resource.

New request body: Document Process Input

New response body: Document Process Output

#### Update an existing record in a Salesforce object using a document based on a received document record

Make a POST request to the

`/connect/form-reader/receivedDocuments/{receivedDocumentId}/record/{targetRecordId}` resource.

New request body: Document Process Input

New response body: Document Process Output

### Unified Health Scoring

#### Fetch the synchronization status for a given score category

Make a GET request to the `/connect/health/scores/synchronization/status/{scoreCategory}` resource.

New required request parameter: `scoreCategory`

New response body: HPI Score Sync State Output

#### Synchronize the calculated score from the Salesforce Customer Data Platform for a given score category

Make a POST request to the `/connect/health/scores/synchronization` resource.

New request body: HPI Score Sync Input

New response body: HPI Score Sync Output

#### SEE ALSO:

[Salesforce Health Cloud Developer Guide Notes: Health Cloud Business APIs](#)

### Changed Connect REST API Request Bodies

This request body has changes.

## POST Care Services Review Requests

### Care Request Input

This request body has these new properties.

- `documentAttachmentStatus`—Status of the document upload based on the checklist provided to the reviewers.
- `unitOfMeasure`—Unit of measure associated with the prior authorization request.

### Content Document Input

This new request body has this new property.

- `id`—ID of the clinical document to be linked to the prior authorization request.

### Requesting Practitioner Input

This request body has this new property.

- `healthCareProviderId`—ID of the provider associated with request creation for this prior authorization.

### Servicing Facility Input

This request body has this new property.

- `servicingFacilityId`—ID of the facility where the patient is receiving the service for this care request.

### Servicing Practitioner Input

This request body has this new property.

- `healthCareProviderId`—ID of the provider associated with providing the service for this care request.

### SEE ALSO:

[Salesforce Health Cloud Developer Guide: Care Services Review Resources \(can be outdated or unavailable during release preview\)](#)  
[Utilization Management Updates](#)

## Changed Connect REST API Response Bodies

These response bodies have changes.

### Get Care Services Review Requests

#### Care Request Output

This response body has these new properties.

- `documentAttachmentStatus`—Status of the document upload based on the checklist provided to the reviewers.
- `unitOfMeasure`—Unit of measure associated with the prior authorization request.

#### Requesting Practitioner Output

This response body has this new property.

- `healthCareProviderId`—ID of the provider associated with request creation for this prior authorization.

#### Servicing Facility Output

This response body has this new property.

- `servicingFacilityId`—ID of the facility where the patient is receiving the service for this care request.

#### Servicing Practitioner Output

This response body has this new property.



- `healthCareProviderId`—ID of the provider associated with providing the service for this care request.

**SEE ALSO:**

[Salesforce Health Cloud Developer Guide: Care Services Review Resources \(can be outdated or unavailable during release preview\)](#)  
[Utilization Management Updates](#)

## HealthCloudExt Namespace

The `HealthCloudExt` namespace has these new classes, methods, interfaces, enums, or exceptions.

### New Interface

**Store additional information in the action logs by implementing the `IUnifiedHealthScore` interface**

Store the health score information using the `IUnifiedHealthScore.saveActionDetail (Map<String,String> var1)` method.

**SEE ALSO:**

[Health Cloud Developer Guide: HealthCloudExt Namespace](#)

## Loyalty Management

Simulate how transaction journals are processed by loyalty program processes. Use built-in filters that decide which transactions are processed by rules. Add prepaid and postpaid partners to your loyalty program and run joint promotions with the partners. Use member engagement attributes to track and reward members for their long-term behavior. Update members' qualifying points balance in real time. Automatically set the expiration date for points credited back to members for canceled redemptions. Learn about members' Salesforce CDP segment when processing their transactions. Issue multiple vouchers with the same voucher code.

**IN THIS SECTION:**[Member Engagement Attributes](#)

Create engagement attributes that track the long-term behavior of members. Update members' progress for each attribute, and reward members for achieving the attribute's target.

[Expanded Partner Management](#)

Manage loyalty program partners more effectively. Create joint promotions to engage the members better and share the liability at the promotion level for each partner. When you create a partner, you can specify the billing type as prepaid or postpaid. You can track the transaction history and calculate the liability.

[Promotion Setup](#)

Simulate how loyalty program processes process transaction journals. Choose the transactions that the rules associated with promotions must process. Schedule batch jobs to process transactions.

[Currency Management](#)

Update the qualifying points balance of members in real time. Provide a contextual expiration date for fixed-model non-qualifying points. Automate the process of deciding the expiration date of points that are credited back to members for canceled redemptions.

[Update Partner Product Details with Partner's Product Cost](#)

Loyalty program managers can add or modify the product cost incurred by a partner during a promotion in the Partner Product Details section. You can use this cost information for analyzing your partner products for loyalty promotion.

### [Process Transactions Based on Members' Segments](#)

Use the Get Member's Active Segments action in flows to get a list of Salesforce CDP segments of which a member is a part. Use the information to either issue vouchers applicable for the segment or decide the appropriate number of points to credit to the member.

### [Loyalty Management for Commerce](#)

Salesforce Order Management is no longer required to work with Loyalty Management for Commerce. When members cancel orders and order items, Loyalty Management automatically reverses the points and vouchers redeemed for the canceled items. Members can add up to 75 items in an order and view their activity history.

### [Use a Single Code for Multiple Vouchers](#)

Make it easy for loyalty program managers to issue vouchers by simplifying your automated process for issuing vouchers. Vouchers no longer require a unique code. You can use the same code to issue multiple vouchers. When migrating vouchers from another system to Salesforce, this feature allows you to easily migrate multiple vouchers with the same code. If multiple vouchers that have the same code are issued to a member, specify the voucher number to uniquely identify the voucher for redemption.

### [Keep All Your Files in One Place](#)

Use the Files related list on Promotion, Voucher Definition, and Benefit records to add relevant files to each corresponding record. For example, a loyalty program manager can add the file that contains the terms and conditions of a promotion to a corresponding Promotion record.

### [Consolidate Members' Points with Ease](#)

All orgs that have Salesforce Loyalty Management enabled can now consolidate members' fixed-model, non-qualifying points and decouple the points expiration process from Loyalty Ledger records. This allows orgs to archive Loyalty Ledger records and make space for new records. Previously, this capability was available only for Loyalty Management - Plus and B2C Loyalty Management Plus.

### [Analytics for Loyalty](#)

Track the performance of your promotions and watch out for fraudulent activities. Add segments to your promotions directly from dashboards.

### [New and Changed Objects in Loyalty Management](#)

Do more with the new and updated Loyalty Management objects.

### [New and Changed Invocable Actions in Loyalty Management](#)

Use the new and changed invocable actions for Loyalty Management.

### [New and Changed Loyalty Management Metadata Types](#)

Make the most of the new and changed metadata types of Loyalty Management.

### [New and Changed Loyalty Management Connect REST APIs](#)

These resources are new or have changes.

### [Apex: New and Changed Items in Loyalty Management](#)

These classes, enums, and methods are new.

## Member Engagement Attributes

Create engagement attributes that track the long-term behavior of members. Update members' progress for each attribute, and reward members for achieving the attribute's target.

**IN THIS SECTION:**[Track Members' Engagement with Your Program](#)

Define attributes that measure a member's engagement with your company. You can configure the engagement duration and length of each period in the duration. Set targets for members, and then track the progress of members either in regular intervals or across the complete duration. Either reward members for achieving an attribute's target or use attributes to restrict the number of times that members are rewarded for a specific activity. For example, you can reward members whenever they make a purchase of more than \$100 or restrict the number of times members are rewarded for signing in to your app.

[Update Members' Progress and Reward Members](#)

Add steps to the rules of a loyalty program process to update a member's progress in achieving the target for an engagement attribute. You can also get the latest details of a member's progress for an attribute and use the information in other steps.

**Track Members' Engagement with Your Program**

Define attributes that measure a member's engagement with your company. You can configure the engagement duration and length of each period in the duration. Set targets for members, and then track the progress of members either in regular intervals or across the complete duration. Either reward members for achieving an attribute's target or use attributes to restrict the number of times that members are rewarded for a specific activity. For example, you can reward members whenever they make a purchase of more than \$100 or restrict the number of times members are rewarded for signing in to your app.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**How:** To define your engagement attribute, go to the new Loyalty Program Engagement Attributes related list in Setup. On the Loyalty Program Engagement Attributes related list, click **New**. Define your engagement attribute and save your changes.

### New Loyalty Program Engagement Attribute

#### Loyalty Program Engagement Attribute Details

Name

Number of App Visits in a Month

Description

Tracks the number of times members have visited the mobile app in a month.

Start Date

3/1/2022

Loyalty Program

Cloud Kicks Inner Circle

Status

Draft

End Date

2/28/2023

#### Reset Details

Value Reset Frequency

Monthly

Default Value

0

Maximum Reset Count Per Period

2

Reset Value On

30

Target Value

5

Overwrite Attribute Current Value

☒

Cancel

Save & New

Save

SEE ALSO:

[Salesforce Help: Member Engagement Attributes Workflow \(can be outdated or unavailable during release preview\)](#)

## Update Members' Progress and Reward Members

Add steps to the rules of a loyalty program process to update a member's progress in achieving the target for an engagement attribute. You can also get the latest details of a member's progress for an attribute and use the information in other steps.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**Why:** For example, you can create a rule that increases the members' engagement by 1 if they place an order that's above \$100. When processing the transaction for the order, verify whether the transaction amount is greater than \$100. Then increase the member's current attribute by 1. Create a condition to check whether the member has achieved the target value of 1. Then add steps to reward the member for achieving the target. Another attribute is used to reward members for signing in to the mobile app and the target is 5. Rules are used

to update the members' progress and reward members for achieving the target. Steps are added in the rule to ensure that members aren't rewarded after they're already rewarded once. You can also get the member's engagement attribute details, check whether the member is close to achieving the target, and issue a voucher to encourage the member to achieve the target.

**How:** In a rule of a loyalty program process, use these actions:

- Update Current Value for Member Attribute: Select an engagement attribute and increase, decrease, or overwrite the member's current value.
- Get Member's Attributes Values: Select an engagement attribute for which you want to get the member's current value.

The screenshot shows the 'New Action' configuration window for the 'Update Current Value for Member Attribute' action. The window has a header bar with a menu icon, the title 'New Action', and a subtitle 'Update Current Value for Member Attribute'. Below the header is a text field for 'Action Name' containing 'Update Member's Online Store Purchase Attribute'. The main configuration area is divided into two sections: 'Input Parameters' and 'Output Parameters'. The 'Input Parameters' section includes 'Engagement Attribute' (set to 'Online Store Purchase per Month'), 'Update Type' (set to 'Increase Current Value'), and 'Value' (set to 'TransactionJournal > Quantity'). The 'Output Parameters' section includes 'Target Value Achieved' (set to 'CheckIfValueAchieved'), 'Current Value' (set to 'AttributeCurrentValue'), 'Target Value' (set to 'AttributeTargetValue'), 'Reset Count' (set to 'Select a parameter...'), 'Maximum Resets' (set to 'Select a parameter...'), 'Attribute Period Start Date' (set to 'Select a parameter...'), and 'Attribute Period End Date' (set to 'Select a parameter...'). At the bottom of the window are 'Cancel' and 'Done' buttons.

Input Parameters	Value
Engagement Attribute *	Online Store Purchase per Month
Update Type *	Increase Current Value
Value *	TransactionJournal > Quantity

Output Parameters	Value
Target Value Achieved	CheckIfValueAchieved
Current Value	AttributeCurrentValue
Target Value	AttributeTargetValue
Reset Count	Select a parameter...
Maximum Resets	Select a parameter...
Attribute Period Start Date	Select a parameter...
Attribute Period End Date	Select a parameter...

SEE ALSO:

[Salesforce Help: Update Members' Progress for Engagement Attributes \(can be outdated or unavailable during release preview\)](#)

## Expanded Partner Management

Manage loyalty program partners more effectively. Create joint promotions to engage the members better and share the liability at the promotion level for each partner. When you create a partner, you can specify the billing type as prepaid or postpaid. You can track the transaction history and calculate the liability.

## IN THIS SECTION:

[Increase Partner Collaboration with Joint Promotions](#)

Now one or more partners from a loyalty program can collaborate more efficiently using the new joint promotion type. Partners can contribute a fixed percentage for promoting their products or services and share the liability. Use joint promotions to engage the members better and capture the liability at the promotion level for each partner easily.

[Specify Prepaid As Billing Type for Loyalty Program Partners](#)

Partners who use prepaid billing are required to purchase points in packs from the loyalty program and use those points to offer the products or services to loyalty program members. Points can be credited or debited to partners for accruals, redemption cancellations, or custom processes.

[Specify Postpaid As Billing Type for Loyalty Program Partners](#)

Partners who use postpaid billing are required to pay the bill amount after offering the products or services to loyalty program members.

[Update Partner Balances Automatically](#)

Create partner ledger records and update partner balances automatically by using the new Create Partner Ledgers and Update Partner Balances Data Processing Engine definition. You can track your partner balances from inception until when the data is last processed for the loyalty program partner. You can use this definition for both prepaid and postpaid billing types.

## Increase Partner Collaboration with Joint Promotions

Now one or more partners from a loyalty program can collaborate more efficiently using the new joint promotion type. Partners can contribute a fixed percentage for promoting their products or services and share the liability. Use joint promotions to engage the members better and capture the liability at the promotion level for each partner easily.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**How:** To create a joint promotion, while creating a promotion, select **Joint**. Then create promotion-partner records by associating the joint promotion and the partners of the loyalty program. When the total contribution percentage of all partners is 100, activate the joint promotion. For example, Cloud Kicks and NTO plan a joint promotion by contributing 40% and 60% respectively. When a loyalty program member uses this promotion and accrues 1,000 points, Cloud Kicks is liable for 400 points and NTO is liable for 600 points.

Promotion  
**Vacation Promotion**

Campaign      Start Date      End Date  
 3/28/2022

**Related**      Details

**Loyalty Program Promotion Partners (2)**      Add

Name	Loyalty Program P...	Contribution Perc...	Program Partners...
<a href="#">00000006</a>	NTO	60%	3/28/2022
<a href="#">00000007</a>	Cloud Kicks	40%	3/28/2022

[View All](#)

**Loyalty Program Promo... (2)**

[00000006](#)

Loyalty Pr... NTO  
Contributi... 60%  
Program ... 3/28/2022

[00000007](#)

Loyalty Pr... Cloud Kicks  
Contributi... 40%  
Program ... 3/28/2022

SEE ALSO:

[Salesforce Help: Create Joint Promotion Partner Records \(can be outdated or unavailable during release preview\)](#)

## Specify Prepaid As Billing Type for Loyalty Program Partners

Partners who use prepaid billing are required to purchase points in packs from the loyalty program and use those points to offer the products or services to loyalty program members. Points can be credited or debited to partners for accruals, redemption cancellations, or custom processes.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**Why:** Whenever a member accrues points for partner transactions, points are debited from the partner's prepaid point packs. When members redeem points for partner transactions, points are credited to the partner account. All partner balances, such as Points Balance, Credited Points, Debited Points, and Purchased Points are tracked in the partner's Prepaid Billing Details section. The partner ledger and ledger summary are used by the loyalty program to credit points or debit points from the partner's points pack.

Vacation Promot... NTO

**Loyalty Program Partner**  
**NTO** [Edit](#) [Delete](#)

Industry: Retail    Type: Accrual    Program Partnership Start Date: 3/28/2022

**Details**

> Partner Details

▼ Prepaid Billing Details

Points Balance ⓘ	Credited Points ⓘ
123.00	0.00
Debited Points ⓘ	Purchased Points ⓘ
0.00	123.00

> Postpaid Billing Details

**Loyalty Program Partner Prepaid Packs (1)** [New](#)

Name	Purchased P...	Remaining P...	Purchase Date
<a href="#">Pack</a>	123.00	123.00	3/28/2022

[View All](#)

**Loyalty Partner Products (1)** [Add Products](#)

Name	Product Cat...	Product	Start Date
<a href="#">MCompass</a>		MCompass	3/28/2022

[View All](#)

SEE ALSO:

[Salesforce Help: Billing Type Options for Partners \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Manage Partner Points for Prepaid Billing \(Example\) \(can be outdated or unavailable during release preview\)](#)

## Specify Postpaid As Billing Type for Loyalty Program Partners

Partners who use postpaid billing are required to pay the bill amount after offering the products or services to loyalty program members.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**Why:** Whenever a member accrues points for partner transactions, the amount is added to the partner's liability. But when members redeem points for partner transactions, the amount is credited to the partner's balance. The sum of all credits and debits of the partner is calculated from inception to the last date of processing and is shown in Postpaid Bill Amount. The loyalty program uses partner ledgers and ledger summaries to add or deduct the monetary value of points from the partner's bill.



**Partner Details**

\*Name: Cloud Kicks

\*Program: Airline

\*Program Partner: partner1

\*Type: --None--

\*Program Partnership Start Date: 3/1/2022

Program Partnership End Date:

\*Industry: Travel

\*Status: Active

Program Partnership Category: --None--

Alert Value:

Custom Liability:

Billing Type: Postpaid

Buttons: Cancel, Save & New, Save

SEE ALSO:

[Salesforce Help: Billing Type Options for Partners \(can be outdated or unavailable during release preview\)](#)

## Update Partner Balances Automatically

Create partner ledger records and update partner balances automatically by using the new Create Partner Ledgers and Update Partner Balances Data Processing Engine definition. You can track your partner balances from inception until when the data is last processed for the loyalty program partner. You can use this definition for both prepaid and postpaid billing types.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Advanced license is enabled.

**How:** From Setup, search for Data Processing Engine. On the Batch Calculation Job Definition page, click **Create Partner Ledgers and Update Partner Balances**, and then review the definition details. Modify the definition details if necessary, and then activate the definition. The job creates the partner ledgers and updates the partner balances.

SEE ALSO:

[Salesforce Help: Create Partner Ledgers and Update Partner Balances DPE Definition \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: About Create Partner Ledgers and Update Partner Balances Definition \(can be outdated or unavailable during release preview\)](#)

## Promotion Setup

Simulate how loyalty program processes process transaction journals. Choose the transactions that the rules associated with promotions must process. Schedule batch jobs to process transactions.

IN THIS SECTION:

### [Run Transaction Processing Simulations](#)

After you create a loyalty program process or update an existing loyalty program process, verify how the transactions are going to be processed. Simulate a transaction journal to get a summary of how the relevant loyalty program process's rules and its child steps process the transaction. After reviewing the summary, loyalty program managers can tweak the loyalty program process to remove any flaws.

### [Filter Transactions Quickly by Using In-Built Logic](#)

Skip defining conditions to determine the transactions that rules associated with promotions must process. Rules that are associated with promotions only process transactions that match the promotion's eligibility criteria.

### [Verify Members' Segment Before Processing Transactions](#)

Configure whether the rules that are associated with promotions only process transactions for members who belong to the promotion's Salesforce CDP segments. This enables loyalty program managers to design rules that are more focused on a segment and the members who belong to the segment. For example, you can target a promotion for segments that have members who are more inclined to purchase sports shoes rather than formal shoes. In that scenario, the rule can issue vouchers that offer members a discount on sports shoes.

### [Schedule Batch Jobs to Process Transaction Journals](#)

Set up Batch Management jobs to process transactions by using loyalty program processes. Depending on the processing requirements of your loyalty program, admins can set up a batch job to automate the processing of transactions.

### [Create Parameters While Designing Rules](#)

You no longer need to define the parameters of a rule before you create the rule. When defining conditions or actions in a rule, you can create parameters based on your requirements. The parameters automatically inherit the type and data type of the fields whose values the parameters are going to store.

## Run Transaction Processing Simulations

After you create a loyalty program process or update an existing loyalty program process, verify how the transactions are going to be processed. Simulate a transaction journal to get a summary of how the relevant loyalty program process's rules and its child steps process the transaction. After reviewing the summary, loyalty program managers can tweak the loyalty program process to remove any flaws.

**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:** Loyalty program managers can use complex rules to configure how transaction journals are to be processed. Before adding loyalty program processes in production orgs and processing actual member transactions, loyalty program managers can run simulations on their sandbox org to test their loyalty program processes. Simulations don't create or update records in your org.

**How:** In the Loyalty Management app, go to a Transaction Journal record, and then run the simulation for the Transaction Journal record.

Transaction Journal  
**00000012**

Clone Adjust Points

Journal Type	Program Member	External Transaction ID	Activity Date	Status
	<a href="#">546928</a>		4/1/2022, 12:00 PM	Pending

**Details** Processing

Details

Program Member	Related Corporate Membership
<a href="#">546928</a>	
Journal Type	Journal Subtype
Related Journal	Referred Member
Industry	Partner
Activity Date	Journal Date
4/1/2022, 12:00 PM	
Status	Loyalty Program
Pending	
Transaction Location	Payment Method

**Loyalty Program Process** Simulation

Run a simulation to view how this transaction journal can be processed by the applicable loyalty program process.

Simulate

SEE ALSO:

[Salesforce Help: Simulate Transaction Journal Processing by Loyalty Program Processes](#) (can be outdated or unavailable during release preview)

## Filter Transactions Quickly by Using In-Built Logic

Skip defining conditions to determine the transactions that rules associated with promotions must process. Rules that are associated with promotions only process transactions that match the promotion's eligibility criteria.

**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:** Rules only process transactions that fulfill these promotion eligibility criteria:

- Activity date must be between the start and end dates of the promotion.
- Journal type must match the promotion's journal type.
- Associated product or product category must match the promotion's product or product category.
- Associated member must be enrolled to the promotion if the promotion requires enrollment.

- Associated member must be part of the campaign that's associated with the promotion.

SEE ALSO:

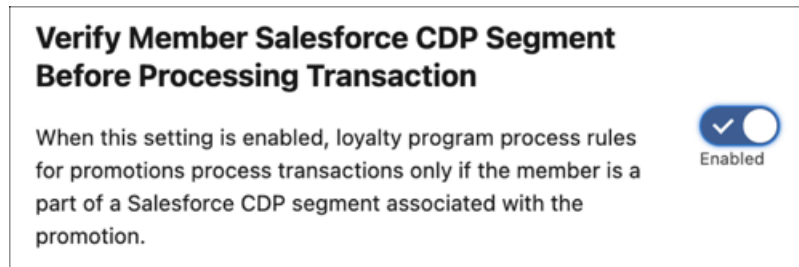
[Salesforce Help: Rules to Process Transaction Journals \(can be outdated or unavailable during release preview\)](#)

## Verify Members' Segment Before Processing Transactions

Configure whether the rules that are associated with promotions only process transactions for members who belong to the promotion's Salesforce CDP segments. This enables loyalty program managers to design rules that are more focused on a segment and the members who belong to the segment. For example, you can target a promotion for segments that have members who are more inclined to purchase sports shoes rather than formal shoes. In that scenario, the rule can issue vouchers that offer members a discount on sports shoes.

**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 and Salesforce CDP are enabled.

**How:** From Setup, in the Quick Find box, enter *Loyalty Management*, and then select **Loyalty Management Settings**. Enable **Verify Member Salesforce CDP Segment Before Processing Transaction**.



SEE ALSO:

[Salesforce Help: Let Loyalty Program Process Rules Process Transactions Based on Customer Data Platform Segment \(can be outdated or unavailable during release preview\)](#)

## Schedule Batch Jobs to Process Transaction Journals

Set up Batch Management jobs to process transactions by using loyalty program processes. Depending on the processing requirements of your loyalty program, admins can set up a batch job to automate the processing of transactions.

**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:** Transaction journals can be added in your org at specific points in a day. Admins can create Batch Management jobs that process transaction journals by using the applicable loyalty program process as soon as transactions are added to your org.

**How:** From Setup, in the Quick Find box, enter *Batch Management*, and then select **Batch Management**. Click **New**. Select **Loyalty Program Process** as the Process Type and **Transaction Journals** as the Execution Process. Enter a batch size that's not more than 250 and click **Next**. Define a filter criteria that decides which transaction journals must be processed by the batch job. We recommend filtering transaction journals that are in the Pending status. Save your changes.

**New batch job**

\* Name  
Process Pending Transactions

\* API Name  
Process\_Pending\_Transactions

Description  
Used to process pending transaction journals using active loyalty program processes.

Process Type  
Loyalty Program Process

\* Execution Process  
Transaction Journals

\* Group ⓘ  
Loyalty Program

\* Batch Size ⓘ  
250

\* Retry Count ⓘ  
1

\* Retry Interval ⓘ  
1,000

Cancel ☒ ☐ Next

SEE ALSO:

[Salesforce Help: Process Transaction Journals in Batches Using Batch Management](#) (can be outdated or unavailable during release preview)

## Create Parameters While Designing Rules

You no longer need to define the parameters of a rule before you create the rule. When defining conditions or actions in a rule, you can create parameters based on your requirements. The parameters automatically inherit the type and data type of the fields whose values the parameters are going to store.

**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.

SEE ALSO:

[Salesforce Help: Create Parameters While Designing Rules \(can be outdated or unavailable during release preview\)](#)

## Currency Management

Update the qualifying points balance of members in real time. Provide a contextual expiration date for fixed-model non-qualifying points. Automate the process of deciding the expiration date of points that are credited back to members for canceled redemptions.

### IN THIS SECTION:

#### [Update the Qualifying Points Balance Quickly](#)

Automatically update the qualifying points balance of members when qualifying points are credited to members. Admins can turn on a setting to update the qualifying points balance of members when a transaction is processed. When this setting is turned on, you don't need to run the Credit Qualifying Points to Members Data Processing Engine definition.

#### [Auto-Calculate the Expiration Date for Points Credited for Canceled Redemptions](#)

Move away from writing custom logic or manually calculating the expiration date of fixed-model, non-qualifying points that are credited back to members for canceled redemptions. When debiting points for a Redemption-type transaction, the date on which the redeemed points set to expire is automatically stored. When canceling the transaction, we add the same date as the expiration date of the points that are credited back to members.

#### [Provide Contextual Expiration Dates for Points](#)

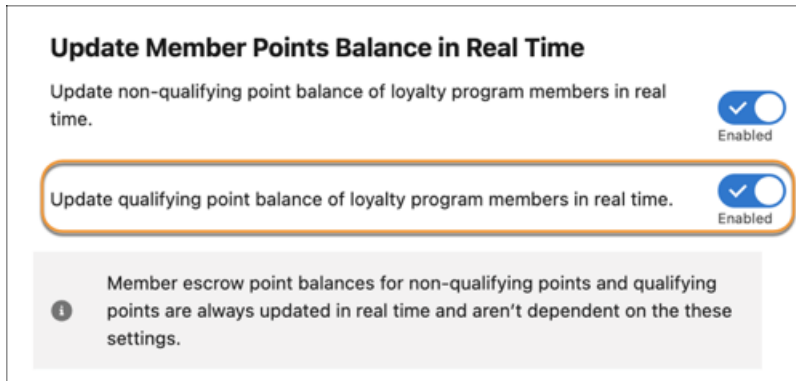
Define expiration dates for members' fixed-model non-qualifying points based on your business scenario. When crediting points to members, enter an expiration date that automatically overrides the expiration date that's calculated based on the currency's expiration model. For example, set a different expiration date for points that are credited to members for a promotion.

## Update the Qualifying Points Balance Quickly

Automatically update the qualifying points balance of members when qualifying points are credited to members. Admins can turn on a setting to update the qualifying points balance of members when a transaction is processed. When this setting is turned on, you don't need to run the Credit Qualifying Points to Members Data Processing Engine definition.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** From Setup, in the Quick Find box, enter *Loyalty Management*, and then select **Loyalty Management Settings**. Enable **Update qualifying point balance of loyalty program members in real time**.



SEE ALSO:

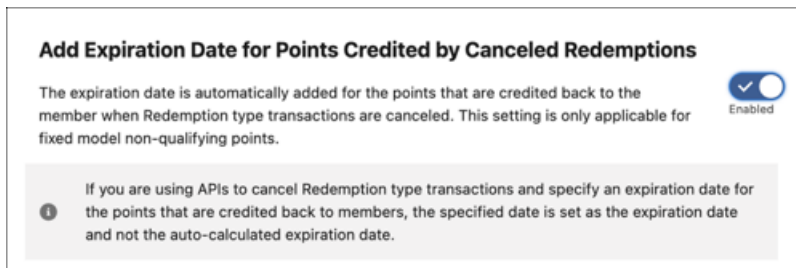
[Salesforce Help: Enable Real-Time Update of Qualifying Points Balance \(can be outdated or unavailable during release preview\)](#)

## Auto-Calculate the Expiration Date for Points Credited for Canceled Redemptions

Move away from writing custom logic or manually calculating the expiration date of fixed-model, non-qualifying points that are credited back to members for canceled redemptions. When debiting points for a Redemption-type transaction, the date on which the redeemed points set to expire is automatically stored. When canceling the transaction, we add the same date as the expiration date of the points that are credited back to members.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** From Setup, in the Quick Find box, enter *Loyalty Management*, and then select **Loyalty Management Settings**. If Consolidate Member Points for Expiration isn't enabled, enable it. Then, enable **Add Expiration Date for Points Credited by Canceled Redemptions**.



SEE ALSO:

[Salesforce Help: Enable Automatic Calculation of Points Expiration Date for Canceled Redemptions \(can be outdated or unavailable during release preview\)](#)

## Provide Contextual Expiration Dates for Points

Define expiration dates for members' fixed-model non-qualifying points based on your business scenario. When crediting points to members, enter an expiration date that automatically overrides the expiration date that's calculated based on the currency's expiration model. For example, set a different expiration date for points that are credited to members for a promotion.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** You can specify the expiration date of points in these ways:

- Credit Points action in Flows
- Adjust Points quick action on Transaction Journal and Loyalty Program Member records
- Credit Points action in rules of loyalty program processes

The screenshot shows the 'Adjust points' form. The 'Points Expiration Date' field is highlighted with an orange box and contains the date 'Jun 30, 2022'. Other fields include 'Points Type' (Reward Points), 'Adjustment' (+/-), 'Value' (50.00), 'Promotion' (Select a promc), 'Category' (Resolve Disputed Points), and 'Comments' (Points not credited for a returned product.). The form has 'Cancel' and 'Adjust' buttons at the bottom right.

SEE ALSO:

[Salesforce Help: Create a Loyalty Program Process \(can be outdated or unavailable during release preview\)](#)






## Update Partner Product Details with Partner's Product Cost

Loyalty program managers can add or modify the product cost incurred by a partner during a promotion in the Partner Product Details section. You can use this cost information for analyzing your partner products for loyalty promotion.

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

**How:** To view the partner product details, from the Loyalty Partner Products related list, click a partner product and review the product details. To add or update the partner's product cost, click **Edit**.



<div>  <div>Loyalty Partner Product</div> <div><b>binoculars</b></div> </div>		
Product	Loyalty Partner	
<a href="#">Hiking Accessories</a>	<a href="#">CX Airline</a>	
Related	<b>Details</b>	
<div> <div> <div>▼</div> <div>Partner Product Detail</div> </div> </div>		
Name		Loyalty Partner
binoculars		<a href="#">CX Airline</a>
Product		End Date
<a href="#">Hiking Accessories</a>		5/31/2022
Start Date		Partner's Product Cost 
3/2/2022		\$1,000.00

SEE ALSO:

*Salesforce Help: Add Partner Products(can be outdated or unavailable during release preview)*

## Process Transactions Based on Members' Segments

Use the Get Member's Active Segments action in flows to get a list of Salesforce CDP segments of which a member is a part. Use the information to either issue vouchers applicable for the segment or decide the appropriate number of points to credit 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 and Salesforce CDP are enabled.

**How:** In a flow, drag the Action element on to the canvas. Select the Category as **Loyalty**. Search and select **Get Member's Active Segments**. In the Loyalty Program Member ID field, either enter the Loyalty Program Member ID or use a resource to automatically populate the ID from previous elements in the flow. If necessary, provide a list of segments from which the action gets the member's segments.

## Loyalty Management for Commerce

Salesforce Order Management is no longer required to work with Loyalty Management for Commerce. When members cancel orders and order items, Loyalty Management automatically reverses the points and vouchers redeemed for the canceled items. Members can add up to 75 items in an order and view their activity history.

### IN THIS SECTION:

#### [Automatically Adjust Points and Vouchers for Canceled Orders or Items](#)

With Loyalty Management for Commerce, after members cancel an order or an item, the points and voucher value that the members redeemed are automatically returned. And the points that the members earned are reversed, saving loyalty program managers and customer service representatives the effort of manually adjusting points and vouchers for cancellations.

#### [Use Order Data Directly Instead of Using Salesforce Order Management](#)

Salesforce Order Management no longer required to use the Loyalty Management for Commerce reference implementation. When a member places an order, the order data is directly used by the Loyalty Management app to create Transaction Journal records.

### [Allow Members to Add More Products and View their Activity History](#)

Loyalty Management for Commerce has added new capabilities and enhanced existing capabilities to provide a better experience for members and admins. The new Activities page on your B2C Commerce site allows members to view the number of points that they've earned for their past activities. Members can also add up to 75 items to their basket. Depending on the company's requirements, admins can schedule a flow to update members' tiers and benefits. Members are rewarded with the exact number of non-qualifying and qualifying points as the amount spent for their order in real time.

## Automatically Adjust Points and Vouchers for Canceled Orders or Items

With Loyalty Management for Commerce, after members cancel an order or an item, the points and voucher value that the members redeemed are automatically returned. And the points that the members earned are reversed, saving loyalty program managers and customer service representatives the effort of manually adjusting points and vouchers for cancellations.

**Where:** This change applies to Lightning Experience in Enterprise edition where Loyalty Management and Salesforce B2C Commerce are enabled.

**How:** Contact your Salesforce representative to know more about Loyalty Management for Commerce.

Home / My Account / Order History

### Receipt

Order Number: 00014701  
Order Date: 7/7/22

Payment:  
Paid with Reward Points  
\$69.27 (6927 points redeemed)

---

2 Items ..... \$59.98

**Solid Silk Tie**  
Color: Navy

Quantity	Total
1	\$29.99

---

**Solid Silk Tie**  
Color: Red

Quantity	Total
1	\$29.99

---

Subtotal .....	\$59.98
Shipping .....	\$5.99
Sales Tax .....	\$3.30
Points Redeemed .....	-\$69.27
<b>Total .....</b>	<b>\$0.00</b>

Cancel Items

---

Cancel Order

## Use Order Data Directly Instead of Using Salesforce Order Management

Salesforce Order Management no longer required to use the Loyalty Management for Commerce reference implementation. When a member places an order, the order data is directly used by the Loyalty Management app to create Transaction Journal records.

**Where:** This change applies to Lightning Experience in Enterprise edition where Loyalty Management and Salesforce B2C Commerce are enabled.

**How:** Contact your Salesforce representative to know more about Loyalty Management for Commerce.

## Allow Members to Add More Products and View their Activity History

Loyalty Management for Commerce has added new capabilities and enhanced existing capabilities to provide a better experience for members and admins. The new Activities page on your B2C Commerce site allows members to view the number of points that they've earned for their past activities. Members can also add up to 75 items to their basket. Depending on the company's requirements, admins can schedule a flow to update members' tiers and benefits. Members are rewarded with the exact number of non-qualifying and qualifying points as the amount spent for their order in real time.

**Where:** This change applies to Lightning Experience in Enterprise edition where Loyalty Management and Salesforce B2C Commerce are enabled.

**How:** Contact your Salesforce representative to know more about Loyalty Management for Commerce.

Home / My Account / My Loyalty Program Activities			
My Activities			
Activity Date	Activity Details	Reeward Points Fixed	Tier Points
Jul 11, 2022	00015201 - Redemption	-100	0
Jul 10, 2022	00015101 - Redemption	-1,111	0
Jul 10, 2022	Accrual for Solid Silk Tie	26.68	26.68
Jul 10, 2022	Accrual for Solid Silk Tie	26.68	26.68
Jul 10, 2022	Accrual for Solid Silk Tie	26.68	26.68

## Use a Single Code for Multiple Vouchers

Make it easy for loyalty program managers to issue vouchers by simplifying your automated process for issuing vouchers. Vouchers no longer require a unique code. You can use the same code to issue multiple vouchers. When migrating vouchers from another system to Salesforce, this feature allows you to easily migrate multiple vouchers with the same code. If multiple vouchers that have the same code are issued to a member, specify the voucher number to uniquely identify the voucher for redemption.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** Specify the voucher code in the Issue Voucher action in Flow Builder. Or, loyalty program managers can specify the same code for multiple vouchers they issue by using the Issue Voucher quick action on the Loyalty Program Member records.

SEE ALSO:

[Salesforce Help: Create a Loyalty Program Process \(can be outdated or unavailable during release preview\)](#)

[Loyalty Management Developer Guide: Redeem Voucher \(can be outdated or unavailable during release preview\)](#)

## Keep All Your Files in One Place

Use the Files related list on Promotion, Voucher Definition, and Benefit records to add relevant files to each corresponding record. For example, a loyalty program manager can add the file that contains the terms and conditions of a promotion to a corresponding Promotion record.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** To use the Files related list, go to the Related tab of Promotion, Voucher Definition, and Benefit records.

## Consolidate Members' Points with Ease

All orgs that have Salesforce Loyalty Management enabled can now consolidate members' fixed-model, non-qualifying points and decouple the points expiration process from Loyalty Ledger records. This allows orgs to archive Loyalty Ledger records and make space for new records. Previously, this capability was available only for Loyalty Management - Plus and B2C Loyalty Management Plus.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management is enabled.

**How:** From Setup, in the Quick Find box, enter *Loyalty Management*, and then select **Loyalty Management Settings**. Turn on **Consolidate Member Points for Expiration**.

## Analytics for Loyalty

Track the performance of your promotions and watch out for fraudulent activities. Add segments to your promotions directly from dashboards.

### IN THIS SECTION:

#### [Analyze Promotion Performance and Identify Potential Fraud with Loyalty Analytics](#)

Analyze your loyalty program's performance and the program's impact on generated revenue, transactions, and new members using the Promotion Performance dashboard. Use these data-driven insights to identify low-performing promotions and take measures to make them more effective. Use the Fraud Analytics dashboard to monitor your loyalty program members and transactions for potential fraud and to get insights to create action plans that prevent fraudulent activities.

#### [Add Segments to Promotions Directly from Your Dashboard](#)

Loyalty program managers can now add Salesforce CDP segments to promotions from the Predicted Revenue for Promotions (Beta) dashboard. They no longer need to navigate to a Promotion record to associate segments to the Promotion record.

## Analyze Promotion Performance and Identify Potential Fraud with Loyalty Analytics

Analyze your loyalty program's performance and the program's impact on generated revenue, transactions, and new members using the Promotion Performance dashboard. Use these data-driven insights to identify low-performing promotions and take measures to make them more effective. Use the Fraud Analytics dashboard to monitor your loyalty program members and transactions for potential fraud and to get insights to create action plans that prevent fraudulent activities.

**Where:** This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited editions where Loyalty Cloud is enabled.

**Who:** To create an app from the Analytics for Loyalty template, you need the TCRM for the Loyalty Cloud add-on license.

**How:** Go to Analytics Studio, and then create your app by using the Analytics for Loyalty template.

## Add Segments to Promotions Directly from Your Dashboard

Loyalty program managers can now add Salesforce CDP segments to promotions from the Predicted Revenue for Promotions (Beta) dashboard. They no longer need to navigate to a Promotion record to associate segments to the Promotion record.

**Where:** This change applies to Tableau CRM in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license and Salesforce CDP are enabled.

## New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

### Create engagement attributes for a loyalty program

Use the new `LoyaltyPgmEngmtAttribute` object.

### Associate an engagement attribute with a promotion

Use the new `LoyaltyPgmEngmtAttrProm` object.

### Update and track members' progress towards reaching the target of an engagement attribute

Use the new `LoyaltyPgmMbrAttributeVal` object.

### View details of the fixed type non-qualifying points redeemed in a transaction journal and their corresponding expiration dates

Use the new `RedeemedPointsExpirationInformation` field of the `TransactionJournal` object.

### View the loyalty program member's qualifying points balance before the second to last reset

Use the new `PointsBalBeforeSecondLastReset` field of the `LoyaltyMemberCurrency` object.

### Create loyalty program partner currency

Use the new `LoyaltyPgmPartnerCurrency` object.

### Create prepaid points pack for a partner in the loyalty program

Use the new `LoyaltyPgmPtrnrPrepaidPack` object.

### Create the ledger summary for a partner in the loyalty program

Use the new `LoyaltyPgmPtrnrLdgrSummary` object.

### Create a ledger for a partner in the loyalty program

Use the new `LoyaltyProgramPartnerLedger` object.

### Create a loyalty program partner promotion

Use the new `LoyaltyPgmPartnerPromotion` object.

### Review a loyalty program partner's details

Use the new `AlertValue`, `CreditedPoints`, `DebitedPoints`, `PurchasedPoints`, `PointsBalance`, `BillingType`, and `PostpaidBillAmount` fields of the `LoyaltyProgramPartner` object.

### View the product cost incurred by a partner during product promotion

Use the new `PartnerProductCost` field of the `LoyaltyPartnerProduct` object.

## New and Changed Invocable Actions in Loyalty Management

Use the new and changed invocable actions for Loyalty Management.

### Get a list of Salesforce CDP segments that a member is a part of.

Use the new `getMemberActiveSegments` action.

### Specify the expiration date of fixed-model non-qualifying points credited to members.

Use the new `PointsExpirationDate` field in the `AdjustPointsAction` action and the `CreditPoints` action.

## New and Changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types of Loyalty Management.

### Action Types

#### Get a list of Salesforce CDP segments that a member is a part of

Use the new `getMemberActiveSegments` enumeration value on the `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

### Metadata Type

#### Update a member's progress towards achieving an engagement attribute target

Use the new `GetMemberAttributesValues` and `UpdateCurrentValueForMemberAttributeValues` in the existing `actionType` field on the `LoyaltyProgramProcessAction` subtype of the `LoyaltyProgramSetup` metadata type.

### Settings

#### Update the qualifying points balance of member automatically when points are credited

Use the new `enableFixedTypeNQPAggregation` field on the `IndustriesLoyaltySettings` metadata type.

#### Allow loyalty program process rules to only process transaction journals when the member is a part of the associated promotion's Salesforce CDP segment

Use the new `enableLoyaltyRulesVerifyCdpMemberSegment` field on the `IndustriesLoyaltySettings` metadata type.

#### Add auto-calculated expiration dates for fixed-model non-qualifying points that are credited back to members for canceled redemptions

Use the new `enableLoyaltyRedeemedPointsExpirationInfoPref` field on the `IndustriesLoyaltySettings` metadata type.

## New and Changed Loyalty Management Connect REST APIs

These resources are new or have changes.

### Loyalty Management

#### Enroll corporate members in a loyalty program

Make a POST request to the new `/loyalty-programs/{loyaltyProgramName}/corporate-member-enrollments` resource.

New request body: Corporate Member Enrollment Input

New response body: Corporate Member Enrollment Output

#### Enroll individual members in a loyalty program

Make a POST request to the new `/loyalty-programs/{loyaltyProgramName}/individual-member-enrollments` resource.

New request body: Individual Member Enrollment Input

New response body: Individual Member Enrollment Output

#### Run a simulation to determine how transaction journals are processed against their corresponding loyalty program processes

Make a POST request to the existing `/connect/realtime/loyalty/programs/{programName}` resource.

**Loyalty Engine Input**

This request body has this new property.

- `runSetting`—The loyalty runtime setting to run the simulation on the transaction journals.

**Loyalty Engine Realtime Output**

This request body has this new property.

- `simulationResults`—The simulation results for the processed transaction journal records.

**Redeem a voucher for a loyalty program member if multiple vouchers exist with the same voucher code**

Make a POST request to the existing

`/loyalty/programs/{programName}/members/{membershipNumber}/vouchers/{voucherCode}/redeem` resource.

New query parameter: `voucherNumber`

**Redeem Voucher Input**

This request body has this new property.

- `currencyIsoCode`—The currency code of the monetary currency in which the voucher is redeemed.

**Retrieve the details of a loyalty program member**

Make a GET request to the new `/loyalty-programs/{loyaltyProgramName}/members` resource.

New response body: Member Profile Output

SEE ALSO:

[Loyalty Management Developer Guide: Redeem Voucher](#)(can be outdated or unavailable during release preview)

## Apex: New and Changed Items in Loyalty Management

These classes, enums, and methods are new.

For more information, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[ConnectApi Namespace](#)

These classes, methods, and enums are new.

[LoyaltyManagement Namespace](#)

The LoyaltyManagement namespace has these new or changed classes and methods.

SEE ALSO:

[Loyalty Management Developer Guide: Apex Reference](#)

### ConnectApi Namespace

These classes, methods, and enums are new.

### ConnectApi Namespace

The ConnectApi namespace has these new classes, new and changed methods, enums.



## Methods

These new methods are in the `ConnectApi.LoyaltyVoucherConnect` class.

### Redeem the full value of a voucher for a member by using a request body

```
redeem(programName, membershipNumber, voucherCode, voucherNumber)
```

### Redeem the partial value of a voucher for a member by using a request body

```
redeem(programName, membershipNumber, voucherCode, voucherNumber, amount)
```

These new methods are in the `ConnectApi.LoyaltyManagementConnect` class.

### Enroll corporate members in a loyalty program

```
enrollCorporateMember(loyaltyProgramName, memberDetails)
```

New input class—`ConnectApi.CorporateMemberInput`

New output class—`ConnectApi.CorporateMemberOutput`

### Enroll individual members in a loyalty program

```
enrollIndividualMember(loyaltyProgramName, memberDetails)
```

New input class—`ConnectApi.IndividualMemberInput`

New output class—`ConnectApi.IndividualMemberOutput`

### Get the details of a loyalty program member using the program member ID

```
getMemberProfileUsingLoyaltyProgramMemberId(loyaltyProgramName, memberId,
programCurrencyName)
```

New output class—`ConnectApi.MemberDetailsOutput`

### Get the details of a loyalty program member using the program membership number

```
getMemberProfileUsingMembershipNumber(loyaltyProgramName, membershipNumber,
programCurrencyName)
```

New output class—`ConnectApi.MemberDetailsOutput`

## LoyaltyManagement Namespace

The `LoyaltyManagement` namespace has these new or changed classes and methods.

## New and Changed Classes

### Determine when the fixed-model non-qualifying points credited by the action expire

Use the new `PointsInputBuilder.setPointsExpirationDate(pointsExpirationDate)` method.

### Get the active Salesforce Customer Data Platform market segment to which the specified loyalty program member belongs

Use methods from the new `GetMemberActiveSegmentsOutput` class.

- Use the `GetMemberActiveSegmentsOutput.getMemberSegmentIDs()` method to return a list of active Salesforce Customer Data Platform segments associated with a loyalty program member.
- Use the `getErrors()` method to return a list of `LoyaltyManagement.LoyaltyActionError` objects.

### Set inputs to get the active Salesforce Customer Data Platform market segments

Use methods from the new `GetMemberActiveSegmentsInputBuilder` class.

- Use the `GetMemberActiveSegmentsInputBuilder.build()` method to return an instance of the `GetMemberActiveSegmentsInput` class.

- Use the `GetMemberActiveSegmentsInputBuilder.setLoyaltyProgramMemberID(loyaltyProgramMemberID)` method to set the program member for whom you want the active Salesforce Customer Data Platform segments to be retrieved.
- Use the `GetMemberActiveSegmentsInputBuilder.setSegmentIds(segmentIds)` method to limit your search to only the active Salesforce Customer Data Platform market segments that are specified.

## Manufacturing Cloud

Efficiently run your program based business by generating forecasts for your products and components based on your customers' forecasts. Then, transform your product forecasts into business opportunities based on profitability analysis, and convert those opportunities into run-rate business. Manage warranties for your products and assets with Manufacturing Cloud for Service.

### IN THIS SECTION:

#### [Manage Your Program-Based Business](#)

Run your program-based business more efficiently by generating forecasts for your products and components based on your customer's forecast. Create and maintain templates to view forecasts according to your customer programs. Create relationships to associate customer products and supplier products by using out-of-the-box objects. Import program forecast data directly into your org using CSV files. Process component forecasts by using Data Processing Engine out-of-the-box templates.

#### [Manage Warranties for Your Products and Assets with Manufacturing Cloud for Service](#)

Your service agents and partners can better manage product and asset warranties by recording warranty term details and assigning them to products or product families, thereby creating standard warranties. They can also enter additional or extended warranties along with exclusions and void terms. A warranty term can have associations with multiple products and assets.

#### [Identity Verification for Manufacturing Cloud](#)

Use Identity Verification to keep your customers' trust and protect their personal information related to your Manufacturing business. Set up flows that customer service representatives can use to verify customers or their authorized representatives. You can even verify an identity using external data.

#### [Develop Accurate Forecasts and Grow Your Business](#)

Get insights into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Forecast Analysis dashboard to monitor the accuracy of your forecast based on the forecasted, adjusted, and actual revenue and quantity. With these data-driven insights, you can analyze how forecasts vary across time and plan measures to improve forecast accuracy. Use the Product Performance dashboard to track the performance of your product against the forecasted demand.

#### [Improve Your Manufacturing Plan with Order Forecasts](#)

Work on an effective manufacturing plan by analyzing statistical order forecasts for an advanced account forecast set. Plan better at a granular level by defining dimensions and period groups that require forecast data. The statistical forecast data includes order quantity values and order revenue values with a confidence level of 95%.

#### [New and Changed Objects for Manufacturing Cloud](#)

Manufacturing Cloud includes these new and changed objects.

#### [New Connect REST APIs](#)

This is a new resource in Manufacturing Cloud.

#### [New Manufacturing Cloud Metadata Types](#)

Make the most of the new metadata types of Manufacturing Cloud.

## Manage Your Program-Based Business

Run your program-based business more efficiently by generating forecasts for your products and components based on your customer's forecast. Create and maintain templates to view forecasts according to your customer programs. Create relationships to associate customer products and supplier products by using out-of-the-box objects. Import program forecast data directly into your org using CSV files. Process component forecasts by using Data Processing Engine out-of-the-box templates.

### IN THIS SECTION:

#### [Define Relationships Between Your Products and Customer Products](#)

Make it clear which components are needed to build your customers' products by creating relationships between your products and theirs. Differentiate between customer products and manufacturing supplier products using the new Product Purpose field.

#### [Define Program Templates for Forecasts](#)

Create program templates to define a structure for your manufacturing programs. Then your account managers can quickly and easily set up customer-specific programs using those templates. You define the template sections with associated forecast sets that contain configuration details for the manufacturing program, the program variants, and related components.

#### [Generate Supplier Forecasts with Data Processing Engine Templates](#)

For improved productivity and accuracy, use the Data Processing Engines to generate component forecasts. You can customize jobs, generate or recalculate data, or schedule the Data Processing Engine job to run during rollover at the end of a period.

#### [Import Forecast Data from CSV Files](#)

Import data from a CSV file into a target object. Use this data to calculate supplier component forecasts, but only after running data processing engine templates.

#### [Use Templates to Easily Create Manufacturing Programs](#)

Your account managers can easily create customer-specific programs using program templates.

#### [Transform Forecast Facts to Opportunities or Quotes to Sales Agreements](#)

Use the business transformation APIs with Program Based Business to convert the forecast fact records into opportunities or quotes to sales agreements. Define mappings between the fact and opportunity objects and quote and sales agreement objects using the ObjectHierarchyRelationship metadata API.

## Define Relationships Between Your Products and Customer Products

Make it clear which components are needed to build your customers' products by creating relationships between your products and theirs. Differentiate between customer products and manufacturing supplier products using the new Product Purpose field.

**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 Program Based Business permission set.

**How:** From the App Launcher, find and select **Products**. Click **New** to add a customer product.

**New Product**

**Product Information**

Product Name: Verican

Product Code: 125567

Product Family: None

Active: ☒

Harmonized Tariff Schedule Code:

Make Name: Zylic

Product SKU:

Product Purpose: Plan

Options: --None--, Sell, Plan (selected), Purchase

Buttons: Cancel, Save & New, Save

Repeat the steps to add components for the customers' product.

**New Product**

**Product Information**

Product Name: Verican White Mirror

Product Code: 11339977

Product Family: None

Active: ☒

Harmonized Tariff Schedule Code:

Make Name:

Product SKU:

Product Purpose: Sell

Product Type: Bundle

Buttons: Cancel, Save & New, Save

Create a relationship between your product and the customers' product by using the Product Related Material object. For example, if your customer's product is a car, and you manufacture mirrors for cars, associate mirrors with the car model using the Product Related Material object.

## SEE ALSO:

[Salesforce Help: Add Customer and Supplier Products \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Relationships Between Customer Products and Supplier Products \(can be outdated or unavailable during release preview\)](#)

## Define Program Templates for Forecasts

Create program templates to define a structure for your manufacturing programs. Then your account managers can quickly and easily set up customer-specific programs using those templates. You define the template sections with associated forecast sets that contain configuration details for the manufacturing program, the program variants, and related components.

**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 Program Based Business permission set.

**Why:** You can also map the forecast fact object that stores the data for the program, variants, or components to the respective forecast sets. For example, you can create a template called Auto Program Template to generate forecasts for parts and accessories associated with a vehicle manufacturer program.

**How:** From Setup, in the Quick Find box, enter *Program Based Business*, and then select **Program Based Business**. On the Program Based Business page, click **New**. Enter a name, status, and description for your template and save your work.

Select a template in draft status from the list and click **New Section**.

New Program Template Item

Name

Program Forecast

Transformation Type

ForecastSetRelation

Display Order

1

Transformation Basis

Program Forecast Set

Description

Enter a description...

Cancel

Save

Repeat the steps to create sections for the program variant forecasts, and program component forecasts.

SEE ALSO:

[Salesforce Help: Create a Program Template \(can be outdated or unavailable during release preview\)](#)

## Generate Supplier Forecasts with Data Processing Engine Templates

For improved productivity and accuracy, use the Data Processing Engines to generate component forecasts. You can customize jobs, generate or recalculate data, or schedule the Data Processing Engine job to run during rollover at the end of a period.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

**Who:** To access this feature, users need the Manufacturing Program Based Business, Advanced Account Forecasting, and Data Pipelines Base User permission sets.

**How:** From Setup, in the Quick Find box, enter *Advanced Account Forecasting*, and then select **Advanced Account Forecasting**. Click **New** to create a forecast set for component forecasts.

SETUP

Advanced Account Forecasting

Advanced Account Forecasting

Extend account forecasting capabilities by defining various forecasting criteria such as territories and business units.

Active

Forecast Sets

Dimension

Period Groups

Forecast Sets

Start creating sets to set up Forecasts for all your Business units

New

Sample Forecast Set

Deactivate

Edit

Program Forecast Set

Activate

Edit

Component Forecast Set

Activate

Edit

Variant Forecast Set

Activate

Edit

In the Building Blocks section for the forecast set, click **Edit** in Data Processing Engine Definitions to associate the Data Processing Engine templates with the forecast set. Add the forecast fact field mappings for the Manufacturing Program Component Forecast Fact object in Forecast Fact Field Mappings.

**Building Blocks**

**Forecast Periods and Fact Object** Edit

Period Group	Forecast Fact Object
Sample Forecast Period Group	Manufacturing Program Component Forecast Fact

**Forecast Fact Field Mappings** Edit

Account	Period	Forecast Quantity	Forecast Revenue	Forecast Status	Forecast Set
Manufacturing Program ID	Period ID	Forecasted Quantity	Forecasted Revenue	Status	Advanced Account Forecast Set Use ID

**Forecast Frequencies** Edit

Calculation Frequency	Rollover Frequency
Not set	Not set

**Data Processing Engine Definitions** Edit

Generation Definition	Rollover Definition	Recalculation Definition	Regeneration Definition
Generate Program Component Forecast	Rollover Program Component Forecast	Recalculate Program Component Forecast	Regenerate Program Component Forecast

Select the forecast set in the Transformation Basis field for component forecasts when creating a program template item for component forecasts.

**New Program Template Item**

\* Name: Program Forecast

\* Transformation Type: ForecastSetRelation

\* Display Order: 1

\* Transformation Basis: Program Forecast Set

Description: Enter a description...

Cancel Save

SEE ALSO:

[Salesforce Help: Streamline Calculations with Data Processing Engine Definitions \(can be outdated or unavailable during release preview\)](#)

## Import Forecast Data from CSV Files

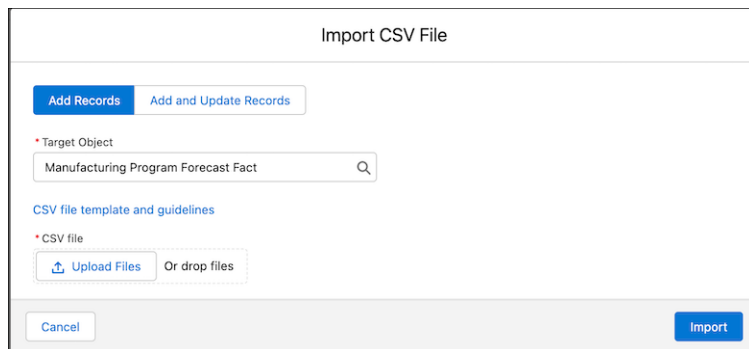
Import data from a CSV file into a target object. Use this data to calculate supplier component forecasts, but only after running data processing engine templates.

**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 Program Based Business permission set.

**How:** From the App Launcher, in the Quick Find box, enter *Manufacturing Programs*, and then select **Manufacturing Programs**. Click **New** to create a manufacturing program. Then, on the Manufacturing Program tab, click **Import CSV File** to import data from a

CSV file into a target object (either Manufacturing Program Forecast Fact or Manufacturing Program Variant Forecast Fact). Create forecast records for program forecasts, and product variant forecasts using the Add Records or Add and Update Records option.



The 'Import CSV File' dialog box features a title bar with the text 'Import CSV File'. Below the title bar, there are two buttons: 'Add Records' and 'Add and Update Records'. A section labeled 'Target Object' contains a search bar with the text 'Manufacturing Program Forecast Fact'. Below this is a link for 'CSV file template and guidelines'. The 'CSV file' section includes an 'Upload Files' button with a file icon and a dashed box labeled 'Or drop files'. At the bottom, there are 'Cancel' and 'Import' buttons.

#### SEE ALSO:

[Salesforce Help: Prepare a CSV File for Program Based Business \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Import Data from a CSV File \(can be outdated or unavailable during release preview\)](#)

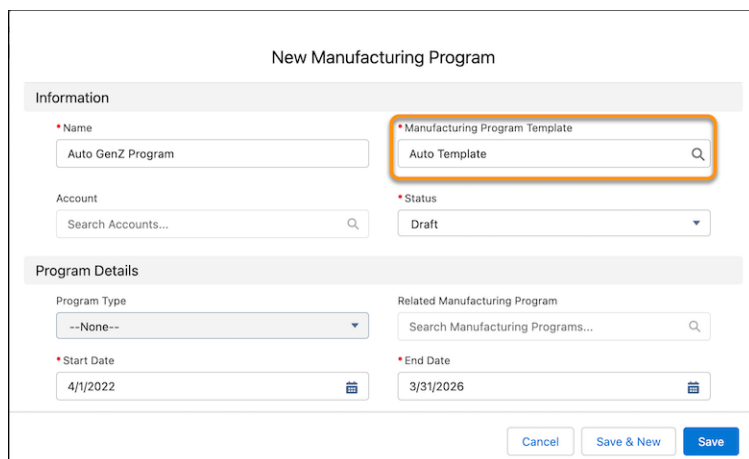
## Use Templates to Easily Create Manufacturing Programs

Your account managers can easily create customer-specific programs using program templates.

**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 Program Based Business permission set.

**How:** From the App Launcher, in the Quick Find box, enter *Manufacturing Programs*, and then select **Manufacturing Programs**. Then, create a manufacturing program with a selected template.



The 'New Manufacturing Program' form is divided into two main sections: 'Information' and 'Program Details'. In the 'Information' section, the 'Name' field is set to 'Auto GenZ Program'. The 'Manufacturing Program Template' dropdown menu is highlighted with an orange box and shows 'Auto Template' as the selected option. The 'Account' field has a search bar. The 'Status' dropdown is set to 'Draft'. The 'Program Details' section includes a 'Program Type' dropdown set to '--None--', a 'Related Manufacturing Program' search bar, a 'Start Date' field set to '4/1/2022', and an 'End Date' field set to '3/31/2026'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

From the App Launcher, find and select **Advanced Account Forecast Set Uses**. Click **New** to add a forecast set use. Create two forecast set uses, one for the manufacturing program and another one for the program variant.



After you create your program, use the Import CSV File option to import program forecasts and program variant forecasts into the manufacturing program. Then, use the Data Processing Engine out-of-the-box or custom templates to generate component forecasts. In the forecast grid, users see forecasts in the display order defined in the template associated with the manufacturing program.

Prod Location	Production Model	Prod Variant Forecast Set	Measure	Aggregate	April FY 2022	May FY 2022
Bangalore	Verikan	Program Forecast Set	Adjusted FS revenue	-	-	-
			revenue (USD)	-	-	-
			FS quantity	15,480	932	936
			FS Revenue (USD)	344,000	186,400	182,000
	Verikan Whiteboard		Adjusted FS revenue	-	-	-
			revenue (USD)	-	-	-
			FS quantity	9,000	1,500	1,500
			FS Revenue (USD)	90,000	150,000	150,000

SEE ALSO:

[Salesforce Help: Create a Manufacturing Program \(can be outdated or unavailable during release preview\)](#)

## Transform Forecast Facts to Opportunities or Quotes to Sales Agreements

Use the business transformation APIs with Program Based Business to convert the forecast fact records into opportunities or quotes to sales agreements. Define mappings between the fact and opportunity objects and quote and sales agreement objects using the ObjectHierarchyRelationship metadata API.

**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 Program Based Business permission set.

**How:** Create mappings between the fields of the source object, Forecast Fact, and the target object, Opportunity, by using the ObjectHierarchyRelationship metadata API. Then use the Transformations API to convert the forecast fact records to opportunities. Similarly, to convert quote to sales agreement, create mappings between the fields of the Quote and Sales Agreements objects. Then use the Transformations API to convert the quote records to sales agreements.

SEE ALSO:

[Salesforce Help: Transform Component Forecast Facts to Opportunities and Quotes to Sales Agreements \(can be outdated or unavailable during release preview\)](#)

## Manage Warranties for Your Products and Assets with Manufacturing Cloud for Service

Your service agents and partners can better manage product and asset warranties by recording warranty term details and assigning them to products or product families, thereby creating standard warranties. They can also enter additional or extended warranties along with exclusions and void terms. A warranty term can have associations with multiple products and assets.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud for Service is enabled.

**Who:** To access this feature, users need the Warranty Lifecycle Management permission set.

**How:** From Setup, in the Quick Find box, enter *Warranty Lifecycle Management*, and then select **Warranty Lifecycle Management**. Enable Warranty Administration. Then, from the App Launcher, find and select **Warranty Terms**. Define the warranty term for a product or asset.

**New Warranty Term**

**Information**

- Warranty Term Name: Tyre Extended Warranty
- Active: ☒
- Warranty Duration: 24
- Effective Start Date: Effective Date
- Warranty Unit Of Time: Months
- Price Book: Accessories Pricebook

**Description**

Description:

Code:

Next, assign warranty terms to a product or product family. You can then create an asset and (if your admin hasn't set up automation) add the standard warranty terms for the product. Enter additional or extended warranty terms for the asset.

### SEE ALSO:

[Salesforce Help: Manage Product and Asset Warranties with Manufacturing Cloud for Service \(can be outdated or unavailable during release preview\)](#)

## Identity Verification for Manufacturing Cloud

Use Identity Verification to keep your customers' trust and protect their personal information related to your Manufacturing business. Set up flows that customer service representatives can use to verify customers or their authorized representatives. You can even verify an identity using external data.

## IN THIS SECTION:

### [Verify the Identity of Your Manufacturing Customers](#)

The Verify Customer Identity flow template for Manufacturing Cloud uses configuration information from the Identity Verification Process records to guide contact center agents through the process of verifying a customer's identity. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

### [Verify the Identity of Your Manufacturing Customers and Their Authorized Representatives](#)

A big part of a call center agent's job is to ensure the privacy of their customers. Even if a person is authorized to inquire about the details of a customer, the agent must verify the identities of both people. You have to use the new Verify Customer Identity flow to verify the identity of the representative and the Verify Linked Caller Identity flow to verify the identity of the customer. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

### [Extend Your Identity Verification Flows with Custom Flow Screen Components in Manufacturing Cloud](#)

To create an identity verification flow from scratch, you have three new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Customer Identity flow template, these screen components are by default present in the flow.

### [Use External Data to Verify Caller Identity in Manufacturing Cloud](#)

Does the data required to verify a caller's identity reside in an external system, outside your Salesforce org? No problem. You can now set up Identity Verification to search an external data source for caller records and verification data.

### [Translate Custom Field Labels for Global Users in Manufacturing Cloud](#)

You may need to customize Identity Verification fields to work with your verification process. Use the Translation Workbench to translate Identity Verification field labels that you customize so that call center agents always see those labels in their preferred language.

### [Use Setup Assistant to Get Up and Running with Identity Verification in Manufacturing Cloud](#)

Set up Identity Verification in a snap with the new setup assistant. All setup steps are now listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

## Verify the Identity of Your Manufacturing Customers

The Verify Customer Identity flow template for Manufacturing Cloud uses configuration information from the Identity Verification Process records to guide contact center agents through the process of verifying a customer's identity. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** This flow template is available to users with the Manufacturing Cloud permission set license.

**How:** In Flow Builder, create a new flow using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Finally, make the flow available to agents by adding it to the Engagement Interaction Lightning record page in Lightning App Builder.

## Verify the Identity of Your Manufacturing Customers and Their Authorized Representatives

A big part of a call center agent's job is to ensure the privacy of their customers. Even if a person is authorized to inquire about the details of a customer, the agent must verify the identities of both people. You have to use the new Verify Customer Identity flow to verify the identity of the representative and the Verify Linked Caller Identity flow to verify the identity of the customer. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the details of the verification, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** This flow template is available to users with the Manufacturing Cloud permission set license.

**How:** Create identity verification process setup records, including at least two Identity Verification Process Detail records: one for primary verification and the other for secondary verification. Link the two records using the Linked Identity Verification Process Detail field in the process detail record for primary verification. Next, in Flow Builder, create a new flow using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Finally, make the flow available to agents by adding it to the Engagement Interaction Lightning record page in Lightning App Builder.

## Extend Your Identity Verification Flows with Custom Flow Screen Components in Manufacturing Cloud

To create an identity verification flow from scratch, you have three new flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Customer Identity flow template, these screen components are by default present in the flow.

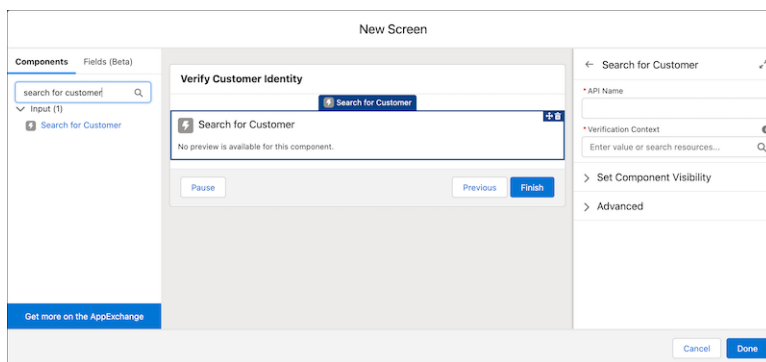
**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** These flow screen components are available to users who are assigned the Manufacturing 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 Customer flow screen component is used to search for callers and customers in Salesforce. This component is available for both primary and secondary verification.
- The Display Search Results flow screen component is used to display the results of searches for callers and customers in Salesforce. This component is available for both primary and secondary verification.
- The Display Verification Results flow screen component is used to display a message to the call center agent indicating that verification was successful. This component is available for both primary and secondary verification.

**How:** In Flow Builder, add a Screen element to your custom flow you're creating or customizing. Select Search for Customer, Display Search Results, or Display Verification Results in the New Screen window, and enter the screen properties.



The top screenshot shows the 'New Screen' editor with the 'Verify Customer Identity' screen. The 'Display Search Results' component is selected in the Components panel. The configuration panel on the right shows fields for API Name, Keywords, Search Criteria, and Verification Context, along with buttons for Set Component Visibility and Advanced.

The bottom screenshot shows the 'New Screen' editor with the 'Verify Customer Identity' screen. The 'Display Verification Results' component is selected in the Components panel. The configuration panel on the right shows fields for API Name, Automatically Navigate to Details, Enable Secondary Message Hyperlink, Initial Object Name, Initial Record ID, Initial Record Name, and Linked Object Name, along with buttons for Set Component Visibility and Advanced.

## Use External Data to Verify Caller Identity in Manufacturing Cloud

Does the data required to verify a caller's identity reside in an external system, outside your Salesforce org? No problem. You can now set up Identity Verification to search an external data source for caller records and verification data.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** This feature is available to users who are assigned the Manufacturing Cloud permission set license.

**How:** Create an Apex class to implement the identity verification process methods for building verification context, searching for caller records, and getting verification data. Then, from Setup, in the Quick Find box, enter *Identity Verification Settings* and then select **Identity Verification Settings**.

The screenshot shows the 'Set Up Identity Verification' page in Salesforce Setup. The page has a title bar with a back arrow, a step indicator '1', the title 'Set Up Identity Verification', and a timer '50 mins'. Below the title bar is a description: 'Configure identity verification, create an identity verification flow, and make the identity verification flow available to agents.' The main content area contains five steps, each with a radio button, a title, a description, a 'Help' link, and a button to proceed:

- Link Identity Verification Configuration and Flow**: Create an Identity Verification Process Definition record that links the identity verification process configuration with an identity verification flow. (Create Process Definition button)
- Set Up Search for Identity Verification**: Configure how identity search works by creating an Identity Verification Process Detail record. (Set Up Search button)
- Set Up Fields for Identity Search and Verification**: Configure the fields that agents use to search for callers and verify caller identities. (Set Up Fields button)
- Create the Identity Verification Flow**: Create a flow using the Verify Caller identity flow template and the Identity Verification Process Definition record name. (Create Flow button)
- Add the Identity Verification Flow**: Make identity verification available to agents by adding the flow to a record page. (Add Flow button)

Expand Set Up Identity Verification and click **Create Process Definition**. Next, create an Identity Verification Process Definition record. Then, click **Set Up Search** on the Identity Verification Setup page to create an Identity Verification Process Detail record. In the process detail record, set the values of the required fields. Be sure to select **External** as the data source type, and select an Apex class.

Identity Verification Process Detail Edit

SamplePersonAccountSearch

Save Save & New Cancel

Description Information

Label: Sample Person Account

Name: SamplePersonAccount

Identity Verification Process: Sample Verification Flow

Definition: Sample Verification Flow

Search Sequence Number: 1

Data Source Type: External

## Translate Custom Field Labels for Global Users in Manufacturing Cloud

You may need to customize Identity Verification fields to work with your verification process. Use the Translation Workbench to translate Identity Verification field labels that you customize so that call center agents always see those labels in their preferred language.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** This feature is available to users who are assigned the View Setup and Configuration permission and are designated as translators.

**How:** From Setup, in the Quick Find box, enter *Translate*, and then select **Translate**. Select **Identity Verification Process Custom Field Label** as the setup component and enter values in the Translation column for the custom field labels.

Translation Workbench

Translate

To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comment) to filter for translatable terms.
4. Double click in the translation column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Language: French

Setup Component: Identity Verification Process Custom Field Label

Master Custom Field Label	Custom Field Label Translation	Out of Date
Data not available for this view		

No records

Page 1 of 1

## Use Setup Assistant to Get Up and Running with Identity Verification in Manufacturing Cloud

Set up Identity Verification in a snap with the new setup assistant. All setup steps are now listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** This feature is available to users who are assigned the Manufacturing Cloud permission set license.

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

Set Up Identity Verification

Configure identity verification, create an identity verification flow, and make the identity verification flow available to agents. 50 mins

Link Identity Verification Configuration and Flow

Create an Identity Verification Process Definition record that links the identity verification process configuration with an identity verification flow.

Help

Create Process Definition

Set Up Search for Identity Verification

Configure how identity search works by creating an Identity Verification Process Detail record.

Help

Set Up Search

Set Up Fields for Identity Search and Verification

Configure the fields that agents use to search for callers and verify caller identities.

Help

Set Up Fields

Create the Identity Verification Flow

Create a flow using the Verify Caller identity flow template and the Identity Verification Process Definition record name.

Help

Create Flow

Add the Identity Verification Flow

Make identity verification available to agents by adding the flow to a record page.

Help

Add Flow

## Develop Accurate Forecasts and Grow Your Business

Get insights into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Forecast Analysis dashboard to monitor the accuracy of your forecast based on the forecasted, adjusted, and actual revenue and quantity. With these data-driven insights, you can analyze how forecasts vary across time and plan measures to improve forecast accuracy. Use the Product Performance dashboard to track the performance of your product against the forecasted demand.

**Where:** This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited editions where Manufacturing Cloud is enabled.

**Who:** To create an app from the Advanced Account Forecasting Analytics for Manufacturing template, enable the Manufacturing Analytics Plus add-on license and Sales Agreements in your org.

**How:** Go to Analytics Studio, and then create your app by using the Advanced Account Forecasting Analytics for Manufacturing template.

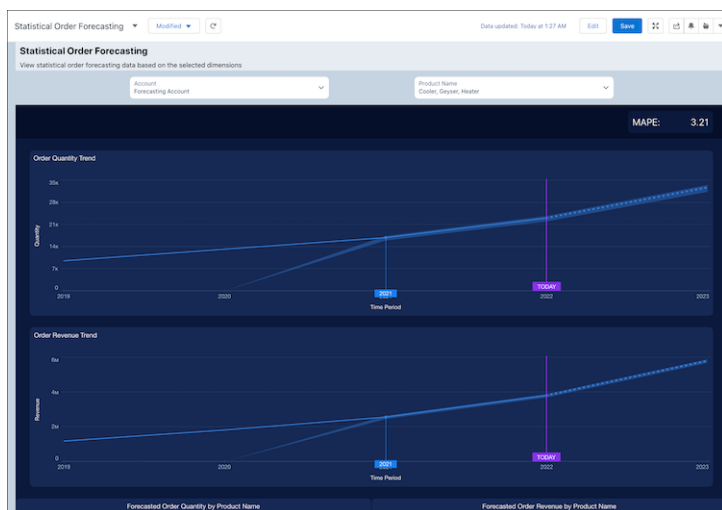
## Improve Your Manufacturing Plan with Order Forecasts

Work on an effective manufacturing plan by analyzing statistical order forecasts for an advanced account forecast set. Plan better at a granular level by defining dimensions and period groups that require forecast data. The statistical forecast data includes order quantity values and order revenue values with a confidence level of 95%.

**Where:** This change applies to Enterprise, Unlimited, and Developer Editions where Manufacturing Cloud is enabled.

**Who:** Users with the Tableau CRM for Manufacturing license can create an app from the Order Forecasting for Manufacturing template.

**How:** From Analytics Studio, click **Create**, and then select **App**. Select the **Order Forecasting for Manufacturing** template. Follow the setup instructions to create your app.



SEE ALSO:

[Salesforce Help: Deploy Statistical Order Forecasting for Manufacturing](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Use the Statistical Order Forecasting Dashboard](#) (can be outdated or unavailable during release preview)

## New and Changed Objects for Manufacturing Cloud

Manufacturing Cloud includes these new and changed objects.

## New Objects

### Create manufacturing programs

Use the new `ManufacturingProgram` object.

### Create program templates

Use the new `MfgProgramTemplate` and `MfgProgramTemplateItem` objects.

### Define relationships between customer and manufacturing supplier products

Use the new `ProductRelatedMaterial` object.

### Manage program, program variant, and component facts

Use the new `MfgProgramForecastFact`, `MfgProgramVariantFrstFact`, and `MfgPgmComponentFrstFact` objects.

### Manage product and asset warranties

Use the `WarrantyTerm`, `ProductWarrantyTerm`, and `AssetWarranty` objects.

## Changed Object

### Define the product purpose

Use the `ProductPurpose` field on the `Product2` object.

SEE ALSO:

[Manufacturing Cloud Developer Guide: Manufacturing Cloud Standard Objects](#) (can be outdated or unavailable during release preview)

## New Connect REST APIs

This is a new resource in Manufacturing Cloud.

## Manufacturing Cloud

### Perform the business transformation of program component forecast data (source object) to opportunities (target object)

Make a POST request to the new `/connect/manufacturing/transformations` resource.

New request body: Transformation Input

New response body: Transformation Output

SEE ALSO:

[Manufacturing Cloud Developer Guide: REST Reference - Transformations](#)

## New Manufacturing Cloud Metadata Types

Make the most of the new metadata types of Manufacturing Cloud.

## Metadata Types

### Create a manufacturing program template

Use the new `MfgProgramTemplate` metadata type.



## Settings

### Enable the Advanced Account Forecasting feature

Use the new enableIndustriesMfgAdvForecast metadata type.

### Enable the Manufacturing Programs (program-based business) feature

Use the new enableIndustriesMfgProgram metadata type.

### Enable the Default Analytics Dashboards setting for Sales Agreements (Beta)

Use the new enableIndustriesMfgIAS metadata type.



**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](#).

## Public Sector Solutions

Get help with configuring Public Sector Solutions by using Guided Setup. Set up Dynamic Assessments to help inspectors, caseworkers, and compliance officers conduct comprehensive inspections, investigations, and evaluations. Design customized care plans to help caseworkers attend to the health care and social services needs of their constituents.

### EDITIONS

Available in: Developer, Enterprise, Performance, and Professional editions.

#### IN THIS SECTION:

##### [Get Up and Running with Ease by Using Guided Setup](#)

Configure Public Sector Solutions with efficiency and confidence, and rest assured that your users are productive from day one, with the new Guided Setup experience. Follow simple, clear steps for all the tasks you must complete to set up your org, from setting up platform basics to creating a constituent portal, to configuring licensing, permitting, and inspection management. Links to other in-app Setup pages keep you focused and on track, and links to detailed Help articles provide answers to any questions that arise along the way.

##### [Bring Simplicity to Complex Investigations with Dynamic Assessments](#)

Give compliance officers, inspectors, and caseworkers greater flexibility and control over inspections, investigations, and evaluations with Dynamic Assessments. Create questionnaires with dependencies and conditional logic so that inspectors and caseworkers can adapt their assessments as they gather information. Expand your agency's reach by conducting Dynamic Assessments with or without onsite visits. Guide inspectors and caseworkers through inspections and evaluations by associating assessment tasks with Action Plans. And use responses to quickly determine recommended services and next steps for constituents, inspectors, and caseworkers alike.

##### [Meet Your Constituents' Health Care and Social Services Needs by Using Care Plans](#)

Empower caseworkers with customized and reusable care plan templates that they can use to help constituents who are in urgent need of health care and social programs and services. Give program managers to define care plan templates with benefits and goals, which caseworkers can use to create specific plans for individual constituents, and monitor their progress. Initiate care plans into action by registering a complaint from a concerned constituent, such as a teacher, and conducting an assessment to gather information and create and assign the care plan..

##### [Change in Permissions for the Account Object](#)

With a Customer Community license, you can only grant Read and Edit access to the Account object. You can no longer grant Create access.

##### [New Objects in Public Sector Solutions](#)

Do more with these new Public Sector Solutions objects.

##### [REST API](#)

Public Sector Solutions includes new Connect REST API resources.

### PublicSectrStln Namespace

The new PublicSectrStln namespace provides new classes and methods for Public Sector Solutions.

## Get Up and Running with Ease by Using Guided Setup

Configure Public Sector Solutions with efficiency and confidence, and rest assured that your users are productive from day one, with the new Guided Setup experience. Follow simple, clear steps for all the tasks you must complete to set up your org, from setting up platform basics to creating a constituent portal, to configuring licensing, permitting, and inspection management. Links to other in-app Setup pages keep you focused and on track, and links to detailed Help articles provide answers to any questions that arise along the way.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled. Available assistants depend on user and permission set licensing.

**Why:** The Public Sector Solutions Guided Setup experience includes these assistants.

- **Initial Public Sector Solutions Set Up:** Complete basic admin tasks to prepare your org for Public Sector Solutions.
- **Set Up License and Permit Management:** Configure your org to manage approval processes for licenses and permits.
- **Set Up Experience Cloud:** Create and customize your constituent portal, configure security, and add members.
- **Set Up Inspection Management:** Help your inspectors perform field activities by capturing tasks, assessment indicators, and assessment results.
- **Set Up Business Rules Engine and Decision Explainer:** Configure Business Rules Engine to automate complex policy decisions, and use Decision Explainer to give reviewers insights into Business Rules Engine's determinations.

**How:** From Setup, in the Quick Find box, enter *Guided Setup*. Then select a setup assistant to begin.

## Bring Simplicity to Complex Investigations with Dynamic Assessments

Give compliance officers, inspectors, and caseworkers greater flexibility and control over inspections, investigations, and evaluations with Dynamic Assessments. Create questionnaires with dependencies and conditional logic so that inspectors and caseworkers can adapt their assessments as they gather information. Expand your agency's reach by conducting Dynamic Assessments with or without onsite visits. Guide inspectors and caseworkers through inspections and evaluations by associating assessment tasks with Action Plans. And use responses to quickly determine recommended services and next steps for constituents, inspectors, and caseworkers alike.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Who:** To use Dynamic Assessments, users need the Dynamic Assessments Access, Industries Visit, and Action Plan permission sets.

SEE ALSO:

[Salesforce Help: Set Up and Use Dynamic Assessments \(can be outdated or unavailable during release preview\)](#)

## Meet Your Constituents' Health Care and Social Services Needs by Using Care Plans

Empower caseworkers with customized and reusable care plan templates that they can use to help constituents who are in urgent need of health care and social programs and services. Give program managers to define care plan templates with benefits and goals, which caseworkers can use to create specific plans for individual constituents, and monitor their progress. Initiate care plans into action by registering a complaint from a concerned constituent, such as a teacher, and conducting an assessment to gather information and create and assign the care plan..

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

**Who:** To use Care Plans, users need the Care Plans Access and Benefit Management Access permission sets.

SEE ALSO:

[Salesforce Help: Configure and Use Care Plans \(can be outdated or unavailable during release preview\)](#)

## Change in Permissions for the Account Object

With a Customer Community license, you can only grant Read and Edit access to the Account object. You can no longer grant Create access.

**Who:** To grant Create permission on the Account object, you need a Customer Community Plus or Partner Community license.

## New Objects in Public Sector Solutions

Do more with these new Public Sector Solutions objects.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

### Dynamic Assessments

**Indicate information about an assessment task that is associated with an OmniScript**

Use the new OmniAssessmentTask object.

**Store information about the regulatory code associated with an assessment question**

Use the new RegulatoryCodeUse object.

**Store information about the violation type associated with an assessment question**

Use the new ViolationTypeUse object.

### Care Plans

**Indicate the template associated with a care plan**

Use the new CarePlanTemplate object.

**Store information about a care plan template associated with a goal**

Use the new CarePlan object.

**Store information about the goal details associated with a care plan template**

Use the new CarePlanTemplateGoal object.

**Store information about the benefit details associated with a care plan**

Use the new CarePlanTemplateBenefit object.

**Indicate the assignment of a goal to a person**

Use the new GoalAssignment object.

## REST API

Public Sector Solutions includes new Connect REST API resources.

## Care Plans

### Create care plans

Make a POST request to the new `/connect/careplan/care-plans` resource.

New request body: Care Plan Input

New response body: Care Plan Generic Output

### Create care plan templates

Make a POST request to the new

`/connect/careplan/careplan-templates/{carePlanTemplateId}/actions/{actionType}` resource.

New request body: Care Plan Template Associations Input

New response body: Care Plan Generic Output

### Retrieve the care plan details

Make a POST request to the new `/connect/careplan/care-plans` resource.

New response body: Care Plan Output

### Retrieve the care plan template details

Make a POST request to the new `/connect/careplan/careplan-templates/{carePlanTemplateId}` resource.

New response body: Care Plan Template

SEE ALSO:

[Public Sector Solutions Developer Guide: Public Sector Solutions APIs](#) (can be outdated or unavailable during release preview)

## PublicSectrStln Namespace

The new `PublicSectrStln` namespace provides new classes and methods for Public Sector Solutions.

### New Classes

#### Save assessment responses from the runtime OmniScript on the Omni Assessment Task page to Salesforce objects

Use the new `AssessmentResponses` class.

#### Save assessment responses from the runtime OmniScript on the Omni Assessment Task page to Salesforce objects

Use the new `storeResponses(input, output, options)` method in the `AssessmentResponses` class.

SEE ALSO:

[Public Sector Solutions Developer Guide: PublicSectrStln Namespace](#) (can be outdated or unavailable during release preview)

## Net Zero Cloud

Track and benchmark your building energy use intensity across various fuel types as a function of building size and geographic location. You can also identify and fix missing or incomplete data for your carbon footprint record.

## IN THIS SECTION:

[Create Building Energy Intensity Benchmark](#)

Track and benchmark your building energy intensity data across various fuel types as a function of building size and geographic location. Use building energy intensities to track energy performance across your building assets and as a reference for filling data gaps. When you cannot obtain information about the energy use in some of your buildings, you can use this data to help calculate a reliable and auditable carbon inventory for those buildings, which leads to improved sustainability impact reporting.

[Manage Carbon Footprint Data Gaps](#)

Identify and fill missing or incomplete energy use data for commercial buildings and data centers in your carbon footprint records. Data gaps can lead to inconsistent emissions inventory reporting data when you calculate your annual carbon footprint.

[Monitor Your Carbon Footprint with Net Zero Analytics](#)

Analyze suppliers' emissions data, and identify office buildings with high energy intensity with the new Net Zero Analytics dashboards. Use the Supplier dashboards to gain insights into supplier emissions and their sustainability efforts. Use these data-driven insights to suggest measures to reduce emissions and improve the suppliers' sustainability score. Use the Building Energy Intensity dashboard to compare the energy consumption and carbon emissions of your office buildings.

[Reduce Your Carbon Footprint with Energy Consumption Predictions](#)

Get predictions about the amount of energy that your stationary assets consume. Minimize your carbon footprint by comparing the predicted and current energy consumption data, analyzing the top contributing factors, and reviewing recommendations to decrease energy consumption. You can filter the prediction data by year, business region, fuel type, and stationary asset type.

[Achieve Net Zero Faster Using Data Driven Insights](#)

Use the What-If Tableau Accelerator to visualize how planned or possible sustainability measures impact the emissions forecast.

[Changed Objects for Net Zero Cloud](#)

Do more with the new and changed Net Zero Cloud objects.

## Create Building Energy Intensity Benchmark

Track and benchmark your building energy intensity data across various fuel types as a function of building size and geographic location. Use building energy intensities to track energy performance across your building assets and as a reference for filling data gaps. When you cannot obtain information about the energy use in some of your buildings, you can use this data to help calculate a reliable and auditable carbon inventory for those buildings, which leads to improved sustainability impact reporting.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

**Who:** Only users with a Building Energy Intensity User permission can perform building energy intensity calculations and use them to fill data gaps.

**How:** To search for and calculate building energy intensities and use them to fill data gaps, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage building energy intensity**.

## Manage Carbon Footprint Data Gaps

Identify and fill missing or incomplete energy use data for commercial buildings and data centers in your carbon footprint records. Data gaps can lead to inconsistent emissions inventory reporting data when you calculate your annual carbon footprint.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

**Who:** Only users with a Data Gap Filling User permission can identify and fill gaps in energy consumption data using benchmarking data.

**Why:** Data gaps, incomplete information for carbon footprint records, can occur if:

- Energy use records share an organization asset and a reporting period with a carbon footprint record but aren't linked to the carbon footprint record
- Multiple energy use records cover the same reporting period
- Monthly electricity usage data is missing

**How:** To identify and fill energy-related data gaps automatically, from Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Settings**. Turn on **Manage data gaps**.

SEE ALSO:

[Salesforce Help: Manage Carbon Footprint Data Gaps](#) (Right-click to view in a new tab or window.)

## Monitor Your Carbon Footprint with Net Zero Analytics

Analyze suppliers' emissions data, and identify office buildings with high energy intensity with the new Net Zero Analytics dashboards. Use the Supplier dashboards to gain insights into supplier emissions and their sustainability efforts. Use these data-driven insights to suggest measures to reduce emissions and improve the suppliers' sustainability score. Use the Building Energy Intensity dashboard to compare the energy consumption and carbon emissions of your office buildings.

**Where:** This change applies to CRM Analytics in Lightning Experience in Enterprise, Unlimited, and Performance editions where Net Zero Cloud is enabled.

**How:** Go to Analytics Studio, and then create your app by using the Net Zero Analytics template.

## Reduce Your Carbon Footprint with Energy Consumption Predictions

Get predictions about the amount of energy that your stationary assets consume. Minimize your carbon footprint by comparing the predicted and current energy consumption data, analyzing the top contributing factors, and reviewing recommendations to decrease energy consumption. You can filter the prediction data by year, business region, fuel type, and stationary asset type.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions where Net Zero Cloud is enabled.

**Who:** Users with the Tableau CRM for Net Zero Analytics add-on license can create apps from the Net Zero templates.

**How:** From Analytics Studio, click **Create**, and then select **App**.

- To import your stationary asset data and map it to Salesforce objects, select the **External Stationary Asset Data** template.
- To get predictions based on the selected year, select the **Stationary Asset Energy Consumption** template.

Follow the setup instructions to create your app.



## SEE ALSO:

[Salesforce Help: Deploy Energy Consumption Predictions for Stationary Assets](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Use the Stationary Asset Energy Consumption Dashboards](#) (can be outdated or unavailable during release preview)

## Achieve Net Zero Faster Using Data Driven Insights

Use the What-If Tableau Accelerator to visualize how planned or possible sustainability measures impact the emissions forecast.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

**Who:** Only users with Salesforce Admin permissions, a Tableau Creator license, and access to Tableau Desktop can use the What-If Tableau Accelerator to perform What-If analysis to forecast carbon emissions.

**How:** Enter specific details about hypothetical adjustments to the various emission categories: renewables, stationary assets, vehicles, and scope 3 greenhouse gas (GHG) emissions. The What-If Tableau Accelerator automatically calculates and then illustrates the impact to the emissions forecast in equivalents of metric tonnes of carbon dioxide (tCO2e).

## SEE ALSO:

[Salesforce Help: Find the Fastest Path to Net Zero](#) (can be outdated or unavailable during release preview)

## Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

### View the calculated emissions values

Use the Ch4EmissionsInKg, Co2EmissionsInKg, and N2oEmissionsInKg fields of the StnryAssetEnrgyUse, StnryAssetCrbnFtpnt, and VehicleAssetCrbnFtpnt.

### Specify the regional division for the building energy intensity record

Use the RegionalDivision field of the BldgEnrgyIntensity object.

## Industries Common Components

Some Industries products are available for use in more than one Industries cloud, or in clouds outside of Industries. With this release, create recurring action plans with the action plan scheduler. Use the Discovery Framework to create digital forms to collect and validate data. Check out improvements to Batch Management, Business Rules Engine, and much more.

## IN THIS SECTION:

[Action Plans](#)

Create recurring action plans by using the action plan scheduler. Change the order in which tasks or document checklist items appear in action plans and action plan templates. Upload one or more files to action plans.

[AI Accelerator](#)

With AI Accelerator, you can build machine learning use cases quickly and easily and conveniently maintain them. Customize the default configuration of your use cases by updating the machine learning models and feature extractors that suit your requirements. Save the extracted features and scoring responses. Customize the sample code that's provided for the use case's configuration and use the AI Accelerator Connect API to generate predictions in real time.

[Discovery Framework](#)

With the Discovery Framework feature, your users can create digital forms to collect and validate data and avoid time-consuming and error-prone manual methods.

[Batch Management](#)

Select the type of process for which you're creating Batch Management jobs.

[Business Rules Engine](#)

Business Rules Engine automates complex policy decisions in workflows. Use Business Rules Engine components to build rules, and then use these components in workflows that are created using Salesforce Flow or OmniStudio. Use Connect APIs to integrate Business Rules Engine components in workflows that are created using third-party tools.

[Decision Table](#)

Improve the performance of your decision table by splitting large amounts of data into multiple groups. Group your business rules with a frequently used input field.

[Einstein Relationship Insights](#)

Learn about your prospects from your colleagues before you contact them. Broaden the scope of your relationship recommendations by exploring documents in Salesforce Files. Determine the data structure and how to process data by identifying structured relationships between Salesforce records. Correct misclassified person or company records. Learn about Einstein's brand changes.

[Intelligent Document Reader](#)

Entering information from a handwritten intake application can be a tedious, error-prone, manual process. Intelligent Document Reader uses your AWS account to access Amazon Textract to get the correct data from the correct documents faster. With Intelligent Document Reader, data from uploaded documents such as applicants' identity and contact information is directly pulled into an online application record, reducing manual document input and management.

[Intelligent Form Reader](#)

Now, setting up data extraction and managing mappings is simpler and easier. You can create a single mapping with multiple objects and delete forms in a mapping. Intelligent Form Reader is compliant with data residency requirements of some more countries.

[Sentiment Insights](#)

Analyze customer sentiment with a dedicated AWS account using the Amazon Comprehend BatchDetectSentiment API. Sentiment Insights categorizes customer sentiment as positive, negative, mixed, or neutral. Analyze customer sentiment on responses to text-based survey questions, identify positive and negative trends, and discover areas of improvement.

[Record Alerts](#)

Enhancements to record alerts include support for reporting, a generic FlexCard for non-aggregation scenarios, and more.

[Intelligent Document Automation](#)

Salesforce can now use checkbox values and other options from uploaded forms when creating records. Also, when creating a record, Salesforce can now automatically create Document Checklist Items.



## Action Plans

Create recurring action plans by using the action plan scheduler. Change the order in which tasks or document checklist items appear in action plans and action plan templates. Upload one or more files to action plans.

### IN THIS SECTION:

#### [Schedule Recurring Action Plans](#)

The action plan scheduler saves you the manual effort of creating action plans for repeatable business processes. Automatically create action plans for recurring business processes. While creating a recurring schedule for action plans, you can enter the recurrence pattern (frequency) and recurrence range. This change is available only for Salesforce admins and owners of action plan records.

#### [Customize the Display Order for Tasks and Document Checklist Items](#)

You can now change the order in which tasks or document checklist items appear in action plans and action plan templates. By rearranging tasks and document checklist items, you can envision the task execution sequence according to your business process. This change is available only for Salesforce admins and owners of action plans and action plan template records.

#### [Attach Files to Action Plans](#)

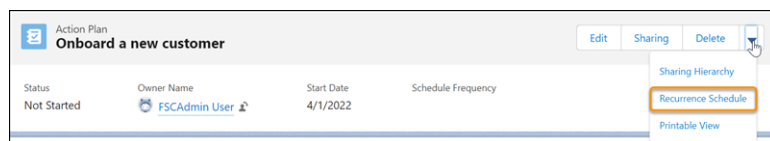
Save time by attaching applicable files to the overall action plan rather than individual tasks. Users with access to the action plan can view attached files. Previously you had to attach files to individual tasks which was often redundant and time-consuming. This change is available only for Salesforce admins and owners of action plan records.

## Schedule Recurring Action Plans

The action plan scheduler saves you the manual effort of creating action plans for repeatable business processes. Automatically create action plans for recurring business processes. While creating a recurring schedule for action plans, you can enter the recurrence pattern (frequency) and recurrence range. This change is available only for Salesforce admins and owners of action plan records.

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

**Why:** For example, financial advisers manually create all action plans across their entire book of business on a per client basis. With the action plan scheduler, finance professionals can automate and track repeatable business processes to ensure a consistent client experience and maximize productivity.



### SEE ALSO:

[Salesforce Help: Schedule Recurring Action Plans](#)(can be outdated or unavailable during release preview)

## Customize the Display Order for Tasks and Document Checklist Items

You can now change the order in which tasks or document checklist items appear in action plans and action plan templates. By rearranging tasks and document checklist items, you can envision the task execution sequence according to your business process. This change is available only for Salesforce admins and owners of action plans and action plan template records.

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

SUBJECT	STATUS	DUE DATE	PREREQUISITE	PRIORITY	REQUIRED	REMINDER	ASSIGNED TO
<a href="#">Discovery</a>	Not Started	Apr 5, 2022		Normal	<input type="checkbox"/>		FSCAdmin Us
<a href="#">Send KYC a...</a>	Not Started	Apr 4, 2022		Normal	<input type="checkbox"/>		FSCAdmin Us
<a href="#">Confirm KY...</a>	Not Started	Apr 6, 2022		Normal	<input type="checkbox"/>		FSCAdmin Us
<a href="#">Prepare a fi...</a>	Not Started	Apr 5, 2022		Normal	<input type="checkbox"/>		FSCAdmin Us

**How:** Use Reorder to rearrange tasks according to the required sequence (1).

SEE ALSO:

[Salesforce Help: Customize the Display Order for Tasks and Document Checklist Items](#)(can be outdated or unavailable during release preview)

## Attach Files to Action Plans

Save time by attaching applicable files to the overall action plan rather than individual tasks. Users with access to the action plan can view attached files. Previously you had to attach files to individual tasks which was often redundant and time-consuming. This change is available only for Salesforce admins and owners of action plan records.

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

SEE ALSO:

[Salesforce Help: Attach Files to Action Plans](#)(can be outdated or unavailable during release preview)

## AI Accelerator

With AI Accelerator, you can build machine learning use cases quickly and easily and conveniently maintain them. Customize the default configuration of your use cases by updating the machine learning models and feature extractors that suit your requirements. Save the extracted features and scoring responses. Customize the sample code that's provided for the use case's configuration and use the AI Accelerator Connect API to generate predictions in real time.

IN THIS SECTION:

### [Configure a Machine Learning Model to Get Predictions](#)

Configure a machine learning model for your use case by specifying the prediction definition ID. You can configure multiple machine learning models for a single use case.

### [Customize the Feature Extractor's Default Configuration](#)

Extend or customize the configuration of your use case's default feature extractor when the machine learning model requires derived inputs to generate predictions. You can update the configuration by specifying the ID of your own Apex class implementation. The configured feature extractor extracts inputs that are passed to the machine learning model to generate predictions. You can configure multiple feature extractors for a single use case.

### [Save Extracted Model Features and Responses During Real-Time Scoring](#)

Choose to save extracted features, the prediction score, insights about the score, and suggestions to improve the score during real-time scoring. The saved values are stored in Salesforce records.

### [Show Predictions on Lightning Pages](#)

Show predictions and suggestions for your use case that the machine learning model generates by adding the Einstein Predictions Using AI Accelerator Lightning App Builder component. Configure the component by selecting the use case, the prediction definition, and other settings.

### [AI Accelerator Has New Objects](#)

Access more data by using these new objects.

### [AI Accelerator Has a New Platform Event](#)

Receive real-time notifications from Salesforce by subscribing to this new standard platform event.

### [AI Accelerator Has New Tooling API Objects](#)

Use Tooling API to work with the AI Accelerator setup objects.

### [Connect REST APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### [AI Accelerator Namespace](#)

AI Accelerator is a new namespace that includes a new interface and methods for overriding or extending the default feature extractor implementation. .

## Configure a Machine Learning Model to Get Predictions

Configure a machine learning model for your use case by specifying the prediction definition ID. You can configure multiple machine learning models for a single use case.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions with Communications Cloud.

**When:** You can use Real-Time Churn Prediction for Communications Cloud with AI Accelerator by the end of August 2022.

**Who:** To configure machine learning models, you need the CRM Plus license and the CRM license for Communications Cloud.

**How:** Before you configure machine learning models, turn on AI Accelerator, and then turn on Real-Time Churn Prediction.

- To turn on AI Accelerator, go to the new AI Accelerator page in Setup.
- To turn on Real-Time Churn Prediction, go to the new Real-Time Churn Prediction page in Setup.
- To configure machine learning models, on the AI Accelerator Setup page, click the Edit action for your use case, and then go to the Use Case Model section.

SEE ALSO:

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

## Customize the Feature Extractor's Default Configuration

Extend or customize the configuration of your use case's default feature extractor when the machine learning model requires derived inputs to generate predictions. You can update the configuration by specifying the ID of your own Apex class implementation. The configured feature extractor extracts inputs that are passed to the machine learning model to generate predictions. You can configure multiple feature extractors for a single use case.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions with Communications Cloud.

**When:** You can use Real-Time Churn Prediction for Communications Cloud with AI Accelerator by the end of August 2022.

**Who:** To configure feature extractors, you need the CRM Plus license and the CRM license for Communications Cloud.

**How:** Before you configure feature extractors, turn on AI Accelerator, and then turn on Real-Time Churn Prediction.

- To turn on AI Accelerator, go to the new AI Accelerator page in Setup.
- To turn Real-Time Churn Prediction, go to the new Real-Time Churn Prediction page in Setup.
- To configure feature extractors, on the AI Accelerator Setup page, click the Edit action for your use case, and then go to the Model Feature Extractor section. Select a use case model, and then configure the feature extractor.

SEE ALSO:

[Salesforce Help: Customize the Configuration of Feature Extractors \(can be outdated or unavailable during release preview\)](#)

## Save Extracted Model Features and Responses During Real-Time Scoring

Choose to save extracted features, the prediction score, insights about the score, and suggestions to improve the score during real-time scoring. The saved values are stored in Salesforce records.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions with Communications Cloud.

**When:** You can use Real-Time Churn Prediction for Communications Cloud with AI Accelerator by the end of August 2022.

**Who:** To configure the saving settings, you need the CRM Plus license and the CRM license for Communications Cloud.

**How:** Before you configure the saving settings, turn on AI Accelerator, and then turn on Real-Time Churn Prediction.

- To turn on AI Accelerator, go to the new AI Accelerator page in Setup.
- To turn Real-Time Churn Prediction, go to the new Real-Time Churn Prediction page in Setup.
- On the AI Accelerator Setup page, click the Edit action for your use case.
  - To enable saving extracted features, the score, insights, and suggestions, go to the Use Case Definition section.
  - To select the objects and fields that store the saved values, go to the Use Case Field Mappings section.

SEE ALSO:

[Salesforce Help: Save Extracted Features and Prediction Results \(can be outdated or unavailable during release preview\)](#)

## Show Predictions on Lightning Pages

Show predictions and suggestions for your use case that the machine learning model generates by adding the Einstein Predictions Using AI Accelerator Lightning App Builder component. Configure the component by selecting the use case, the prediction definition, and other settings.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions with Communications Cloud.

**When:** You can use Real-Time Churn Prediction for Communications Cloud with AI Accelerator by the end of August 2022.

**Who:** To add the scorecard component and configure it, you need the CRM Plus license and the CRM license for Communications Cloud.

**How:** From the Setup menu on a lightning page, select **Edit Page**. Drag the Einstein Predictions Using AI Accelerator component on the canvas.

SEE ALSO:

[Salesforce Help: Show Predictions on Lightning Pages \(can be outdated or unavailable during release preview\)](#)

## AI Accelerator Has New Objects

Access more data by using these new objects.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions when admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

**Get information about the feature extractors that extract inputs for use case models**

Use the new `AIFeatureExtractor` object.

**Get information about the use cases that you onboard to the AI Accelerator platform**

Use the new `AIUsecaseDefinition` object.

**Get information about the objects and fields that save the extracted features, the score, insights, and suggestions**

Use the new `AIUsecaseFieldMapping` object.

**Get information about the machine learning models that generate predictions for use cases**

Use the new `AIUsecaseModel` object.

SEE ALSO:

[Industries Common Resources Developer Guide: AI Accelerator Standard Objects](#) (can be outdated or unavailable during release preview)

## AI Accelerator Has a New Platform Event

Receive real-time notifications from Salesforce by subscribing to this new standard platform event.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions when admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

**Be notified when the job that generates prediction scores for your use cases, that's executed in asynchronous mode, is completed**

Subscribe to `AIScoringStatusEvent` to receive notifications when the scoring job started by the `/services/data/{release version}/connect/aiaccelerator/predictions` REST request, executed in asynchronous mode, is complete.

SEE ALSO:

[Industries Common Resources Developer Guide: AI Accelerator Platform Event](#) (can be outdated or unavailable during release preview)

## AIAccelerator Has New Tooling API Objects

Use Tooling API to work with the `AIAccelerator` setup objects.

**Extract the input data required by the machine learning model for making predictions**

Use the new `AIFeatureExtractor` object.

**Set up the use case for which real-time predictions are to be made**

Use the new `AIUsecaseDefinition` object.

**Store the extracted features, scores, insights, and recommendations for a prediction**

Use the new `AIUsecaseFieldMapping` object.

**Store the machine learning models that generate predictions for use cases**

Use the new `AIUsecaseModel` object.

SEE ALSO:

[Industries Common Resources Developer Guide: AI Accelerator Tooling Objects](#) (can be outdated or unavailable during release preview)

## Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

### Retrieve real-time score predictions using the AI Accelerator

Make a POST request to the new `/connect/aiaccelerator/predictions` resource.

New request body: Prediction Input

New response body: Prediction Output

SEE ALSO:

[Industries Common Resources Developer Guide: AI Accelerator Business APIs \(can be outdated or unavailable during release preview\)](#)

## AiAccelerator Namespace

AiAccelerator is a new namespace that includes a new interface and methods for overriding or extending the default feature extractor implementation. .

### New Interface

#### Override or extend the default feature extractor implementation

Implement the new `CustomFeatureExtractor` interface.

#### Use the custom feature extractor to extract the features for a model at run time to make a prediction

Use the `extractFeatures(var1, var2)` method.

SEE ALSO:

[Industries Common Resources Developer Guide: AI Accelerator Apex Reference \(can be outdated or unavailable during release preview\)](#)

## Discovery Framework

With the Discovery Framework feature, your users can create digital forms to collect and validate data and avoid time-consuming and error-prone manual methods.

### IN THIS SECTION:

[Discovery Framework](#)

The new Discovery Framework data model and the power of OmniStudio enable your users to manage every aspect of questionnaire-driven data collection. Your users can create digital forms to collect and validate their customers' information in a compliant manner.

[Discovery Framework Objects](#)

Do more with the discovery framework objects.

## Discovery Framework

The new Discovery Framework data model and the power of OmniStudio enable your users to manage every aspect of questionnaire-driven data collection. Your users can create digital forms to collect and validate their customers' information in a compliant manner.

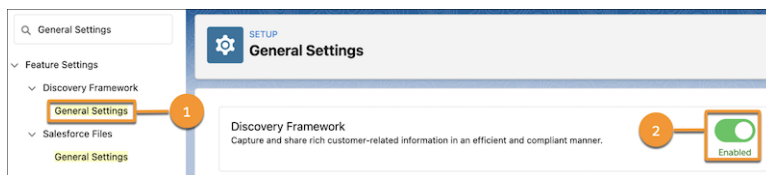
**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where a Financial Services Cloud Growth license is enabled.

**Note:** Although the Discovery Framework is generally available, the set of features that includes import and export of assessment questions, assessment question versioning, and assessment question sets using metadata APIs 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:** Discovery Framework makes it easy for you to perform financial needs analysis, digital onboarding, and any other type of data collection. After you enable the discovery framework data model in an org, your users can:

- Create questions: Use an intuitive user interface to create both standard and hierarchical questions. Create a repository of questions that's used as a single source of truth.
- Create forms: Leverage the power of OmniStudio, which provides an intuitive UI to create complex forms.
- Activate and deploy forms: Make forms available for Communities, Lightning Pages, custom LWCs, and Lightning tabs by activating and deploying the form.
- Import and export (beta): Use metadata APIs to import and export assessment questions, assessment question versions, and assessment question sets.

**How:**



From Setup, in the Quick Find box, enter *General Settings*, and then under Discovery Framework, select **General Settings** (1). Enable **Discovery Framework** (2).

SEE ALSO:

[Salesforce Help: Set Up and Configure Discovery Framework](#)(can be outdated or unavailable during release preview)

[Industries Common Resources Developer Guide: Discovery Framework Metadata API Types](#)(can be outdated or unavailable during release preview)

## Discovery Framework Objects

Do more with the discovery framework objects.

### Capture information about assessment question sets.

Use the new AssessmentQuestionSet object.

### Capture information about assessment questions.

Use the new AssessmentQuestion object.

### View assessment question version details.

Use the new AssessmentQuestionVersion object.

### Capture information about an assessment.

Use the new Assessment object.

### Capture responses to an assessment question.

Use the new AssessmentQuestionResponse object.

### Use the junction between an assessment question set and an assessment question.

Use the new AssessmentQuestionAssignment object.

**Use the junction between an OmniScript process and an assessment question version.**

Use the new OmniProcessAsmtQuestionVer object.

SEE ALSO:

[Salesforce Help: Set Up and Configure Discovery Framework](#)(can be outdated or unavailable during release preview)

## Batch Management

Select the type of process for which you're creating Batch Management jobs.

### IN THIS SECTION:

#### [Select the Process Type for a Batch Job](#)

Now you can run a batch job for Loyalty Program Process as you can for flow. So when you define a batch job, the Process Type field is available on the Batch job page. You can choose either Flow or Loyalty Program Process as your process type from the page. The process type that you can select depends on your product licenses.

#### [Remove Child Records of Batch Management Job Runs](#)

You now have the flexibility to delete records that are associated with a Batch Management job run without deleting the run itself. After a Batch Management job's run completes or fails, you can delete individual batch job parts or batch job parts' failed records.

#### [Changed Objects in Batch Management](#)

Specify the process type of the process you want to run the job for.

#### [Changed Batch Management Metadata Types](#)

Make the most of the changed metadata type of Batch Management.

## Select the Process Type for a Batch Job

Now you can run a batch job for Loyalty Program Process as you can for flow. So when you define a batch job, the Process Type field is available on the Batch job page. You can choose either Flow or Loyalty Program Process as your process type from the page. The process type that you can select depends on your product licenses.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, or Loyalty Management is enabled.

**How:** From Setup, search for *Batch Jobs*. Define a new batch job. The Process Type field is on the batch job page. Choose a process type.



**New batch job**

\* Name: NTO Transaction Journals

\* API Name: NTO\_Transaction\_Journals

Description: NTO TJs for this promotion

Process Type: Select Process Type (dropdown menu open showing Flow and Loyalty Program Process)

\* Execution Process: Select an execution process...

\* Batch Size: Enter a batch size...

\* Retry Count:

\* Retry Interval:

Cancel [Progress Bar] Next

## Remove Child Records of Batch Management Job Runs

You now have the flexibility to delete records that are associated with a Batch Management job run without deleting the run itself. After a Batch Management job's run completes or fails, you can delete individual batch job parts or batch job parts' failed records.

**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**. Open a Flow or a Loyalty Program Process type batch job run that's completed or failed. Click **Tasks** or **Failed Records**. Click for the batch job part or the batch job part's failed record that you want to delete. Click **Delete** > **Delete**.

## Changed Objects in Batch Management

Specify the process type of the process you want to run the job for.

### Create a batch job definition using the loyalty program process

Use the new `Type` field value on the `BatchProcessJobDefinition` object.

### View a batch job definition using the loyalty program process

Use the new `Type` field on the `BatchProcessJobDefView` object.

## Changed Batch Management Metadata Types

Make the most of the changed metadata type of Batch Management.

### Create Batch Management jobs that process transaction journals using active loyalty program processes

Use the new `executionProcessApiName` and `type` fields on the `BatchProcessJobDefinition` metadata type.

## Business Rules Engine

Business Rules Engine automates complex policy decisions in workflows. Use Business Rules Engine components to build rules, and then use these components in workflows that are created using Salesforce Flow or OmniStudio. Use Connect APIs to integrate Business Rules Engine components in workflows that are created using third-party tools.

## IN THIS SECTION:

### [Invoke Decision Matrices from Flows](#)

You can now invoke a decision matrix in flows that are created using Salesforce Flow. A decision matrix is an exact-match-based lookup table. A decision matrix matches your inputs to a row in the table and returns the row's output. When you call a decision matrix from a flow, the matrix returns the output to the flow.

### [Invoke Expression Sets from Flows](#)

You can now invoke an expression set in flows that are created using Salesforce Flow. An expression set is a rule that automates decision making and provides solutions faster. When you invoke an expression set from a flow, the expression set returns the outcome to the flow.

### [Add Automated Decisions to Workflows Created with Third-Party Tools](#)

Do you use custom workflows? Or do you find it difficult to add automated decisions to workflows because you use third-party tools to build your workflows? Not a problem! You can now add expression sets, decision matrices, and decision tables to workflows created with your tool of choice. Use Business Rules Engine Connect APIs to call these Business Rules Engine components in your workflows.

### [Create Rules in a Compact, Lookup-Table Format with Decision Tables](#)

Build complex rules in an easy-to-read format by using decision tables. Decision tables read business rules and deliver outcomes for the scenarios that you define. Decision tables match your inputs with the relevant rows in the table and return one or more matching outcomes. You can use data from sObjects to define input and output columns in your decision table. You can also use a different operator for each column in the table.

### [Visualize Conditional Paths with Branching](#)

With the branch element in expression sets, create and simultaneously view multiple paths that an expression set can take. A branch can have up to six paths, including the default path. Paths have priorities in a descending order from left to right. The left-most path has the highest priority. In a non-default path, the first step is the entry condition for the path. This condition determines whether to enter the path. If the branch step doesn't meet the entry conditions for the paths, it takes the default path—the path with no entry condition.

### [Build Conditions Faster Using the Enhanced Condition Builder](#)

In the new no-code user interface, build your conditions in a few clicks. Previously, you had to enter the condition expression manually. With this change, you have the flexibility of switching between the no-code default mode and the advanced manual mode.

### [Build Your Expression Sets Quickly Using Templates](#)

With the prebuilt expression set templates, you can now view an expression set end-to-end, and use it as reference to build your own expression sets. Expression set templates are read-only and can't be modified or deleted. Save templates as expression sets, and modify them, if necessary. These templates provide an outline for your expression sets and save you the trouble of building an expression set from nothing.

### [Control Sharing and Editing of Rules with Metadata APIs](#)

Before you deploy rules created in Business Rules Engine in your production org, test and modify the rules. If the rules work as expected, use metadata APIs to move the rules to other orgs easily. With metadata APIs, you can also read and edit the metadata of your rules.

### [Use the LIKE and NOTLIKE Functions Instead of Operators](#)

The LIKE and NOTLIKE operators for the text data type are no longer supported in expression sets. Instead, use the LIKE and NOTLIKE functions for text variables and constants.

### [New Naming Guideline for Expression Sets and Decision Matrices](#)

Now, the names of expression sets, expression set versions, decision matrices, and decision matrix versions can start only with letters. The names can't start with numbers or special characters. The names also can't exceed 75 characters, including spaces. Previously, starting names with numbers and special characters was fine. For a successful migration, adhere to the new naming guideline, even when you're migrating previously created expression sets and decision matrices.

[New and Changed Objects in Business Rules Engine](#)

Do more with these Business Rules Engine objects.

[New Invocable Actions For Business Rules Engine](#)

Use the new invocable actions for Business Rules Engine to call expression sets and decision matrices in Flow.

[New Metadata Types for Business Rules Engine](#)

Business Rules Engine has new metadata type and enumeration.

[New Tooling API Objects in Business Rules Engine](#)

Use Tooling APIs to work with Business Rules Engine setup objects.

[Connect REST APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

## Invoke Decision Matrices from Flows

You can now invoke a decision matrix in flows that are created using Salesforce Flow. A decision matrix is an exact-match-based lookup table. A decision matrix matches your inputs to a row in the table and returns the row's output. When you call a decision matrix from a flow, the matrix returns the output to the flow.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

**Who:** Users need the Rules Engine Runtime permission set to call decision matrices from flows that are created in Flow Builder.

**How:** In Flow Builder, drag the **Action** element onto the canvas. Select the **Decision Matrices** category. Search for and select the decision matrix that you want to call, and then enter values for the input parameters that are defined in the matrix.

### SEE ALSO:

[Salesforce Help: Invoke a Decision Matrix in a Flow \(can be outdated or unavailable during release preview\)](#)

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

[Salesforce Help: Considerations for Creating and Editing Decision Matrices \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create Standard Decision Matrices \(can be outdated or unavailable during release preview\)](#)

## Invoke Expression Sets from Flows

You can now invoke an expression set in flows that are created using Salesforce Flow. An expression set is a rule that automates decision making and provides solutions faster. When you invoke an expression set from a flow, the expression set returns the outcome to the flow.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

**Who:** Users need the Rules Engine Runtime permission set to run expression sets from flows that are created in Flow Builder.

**How:** In Flow Builder, drag the **Action** element onto the canvas. Select the **Expression Sets** category. Search for and select the expression set that you want to invoke, and then enter values for the input parameters that are defined in the expression set.

### SEE ALSO:

[Salesforce Help: Invoke an Expression Set in a Flow \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Build Your Expression Set \(can be outdated or unavailable during release preview\)](#)

## Add Automated Decisions to Workflows Created with Third-Party Tools

Do you use custom workflows? Or do you find it difficult to add automated decisions to workflows because you use third-party tools to build your workflows? Not a problem! You can now add expression sets, decision matrices, and decision tables to workflows created with your tool of choice. Use Business Rules Engine Connect APIs to call these Business Rules Engine components in your workflows.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

## Create Rules in a Compact, Lookup-Table Format with Decision Tables

Build complex rules in an easy-to-read format by using decision tables. Decision tables read business rules and deliver outcomes for the scenarios that you define. Decision tables match your inputs with the relevant rows in the table and return one or more matching outcomes. You can use data from sObjects to define input and output columns in your decision table. You can also use a different operator for each column in the table.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

**Who:** Users need the Rules Engine Designer permission set to create decision tables. Users must also have access to the sObject that's used in the decision table.

SEE ALSO:

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

[Salesforce Help: Business Rules in Decision Tables \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Key Decision Table Terms in Business Rules Engine \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Decision Table \(can be outdated or unavailable during release preview\)](#)

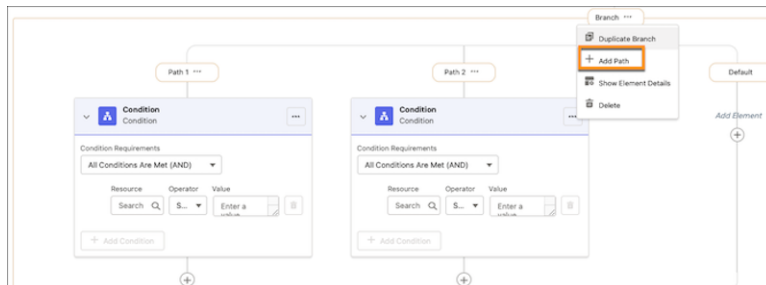
## Visualize Conditional Paths with Branching

With the branch element in expression sets, create and simultaneously view multiple paths that an expression set can take. A branch can have up to six paths, including the default path. Paths have priorities in a descending order from left to right. The left-most path has the highest priority. In a non-default path, the first step is the entry condition for the path. This condition determines whether to enter the path. If the branch step doesn't meet the entry conditions for the paths, it takes the default path—the path with no entry condition.

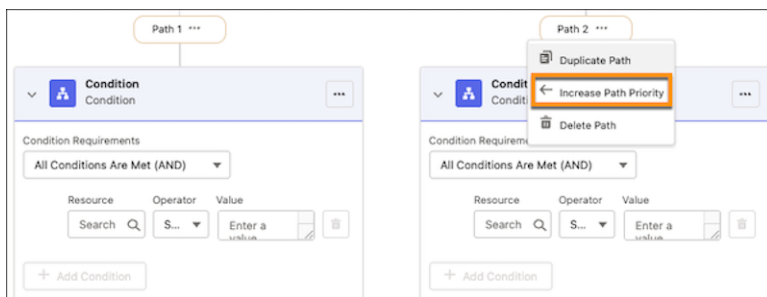
**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

**How:** In the Expression Set Builder, add a Branch element to the canvas. The element has two conditional paths and one default path. Add more paths, or delete paths that you don't need. Default paths can't be deleted. Populate the entry conditions for the non-default paths, and add additional elements to the paths, as required.

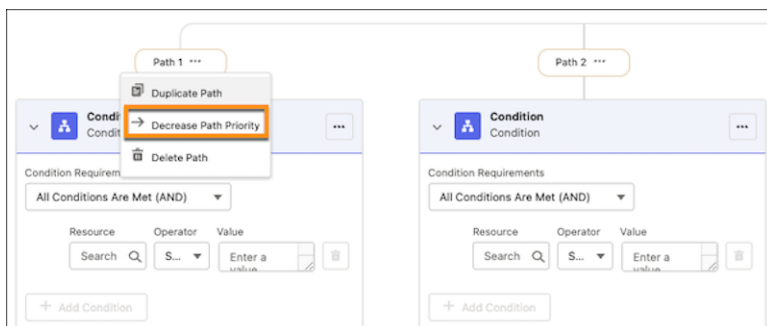
To add paths, in the actions menu for a branch element, select **+ Add Path**.



To increase path priority, in the actions menu for a path, select **Increase Path Priority**.



To decrease path priority, in the actions menu for a path, select **Decrease Path Priority**.



SEE ALSO:

[Salesforce Help: Step Elements in Expression Sets \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Branch Element in Expression Sets \(Example\) \(can be outdated or unavailable during release preview\)](#)

## Build Conditions Faster Using the Enhanced Condition Builder

In the new no-code user interface, build your conditions in a few clicks. Previously, you had to enter the condition expression manually. With this change, you have the flexibility of switching between the no-code default mode and the advanced manual mode.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Step Elements in Expression Sets \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Default and Advanced Modes in the Condition Element \(can be outdated or unavailable during release preview\)](#)

## Build Your Expression Sets Quickly Using Templates

With the prebuilt expression set templates, you can now view an expression set end-to-end, and use it as reference to build your own expression sets. Expression set templates are read-only and can't be modified or deleted. Save templates as expression sets, and modify them, if necessary. These templates provide an outline for your expression sets and save you the trouble of building an expression set from nothing.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Build Your Expression Set Using Templates \(can be outdated or unavailable during release preview\)](#)

## Control Sharing and Editing of Rules with Metadata APIs

Before you deploy rules created in Business Rules Engine in your production org, test and modify the rules. If the rules work as expected, use metadata APIs to move the rules to other orgs easily. With metadata APIs, you can also read and edit the metadata of your rules.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

## Use the LIKE and NOTLIKE Functions Instead of Operators

The LIKE and NOTLIKE operators for the text data type are no longer supported in expression sets. Instead, use the LIKE and NOTLIKE functions for text variables and constants.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

SEE ALSO:

[Salesforce Help: Operators and Functions in Expression Sets \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Variables and Constants in Expression Sets \(can be outdated or unavailable during release preview\)](#)

## New Naming Guideline for Expression Sets and Decision Matrices

Now, the names of expression sets, expression set versions, decision matrices, and decision matrix versions can start only with letters. The names can't start with numbers or special characters. The names also can't exceed 75 characters, including spaces. Previously, starting names with numbers and special characters was fine. For a successful migration, adhere to the new naming guideline, even when you're migrating previously created expression sets and decision matrices.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

## New and Changed Objects in Business Rules Engine

Do more with these Business Rules Engine objects.

### Create expression sets

Use the new ExpressionSet object.

### Create expression set versions

Use the new ExpressionSetVersion object.

### Add a unique name and a decision matrix type

Use the new UniqueName and DecisionMatrixType fields in the CalculationMatrix object.

### View the migration status and the decision matrix definition ID

Use the new MigrationStatus and DecisionMatrixDefinitionId fields in the CalculationMatrix object.

**View the decision matrix definition version ID**

Use the new `DecisionMatrixDefVerId` field in the `CalculationMatrixVersion` object.

**IN THIS SECTION:**[Retired Objects](#)

These objects in Business Rules Engine are retired.

**Retired Objects**

These objects in Business Rules Engine are retired.

If you created records using these objects, they are automatically migrated to the new data model for expression sets.

**CalculationProcedure is retired**

`CalculationProcedure` and `CaclulationProcedure` API object are no longer available.

**CalculationProcedureVersion is retired**

`CalculationProcedureVersion` and `CaclulationProcedureVersion` API object are no longer available.

**CalculationProcedureVariable is retired**

`CalculationProcedureVariable` and `CalculationProcedureVariable` API object are no longer available.

**CalculationProcedureStep is retired**

`CalculationProcedureStep` and `CalculationProcedureStep` API object are no longer available.

**CalculationProcStepRelationship is retired**

`CalculationProcStepRelationship` and `CalculationProcStepRelationship` API object are no longer available.

**New Invocable Actions For Business Rules Engine**

Use the new invocable actions for Business Rules Engine to call expression sets and decision matrices in Flow.

**Run an expression set to return an outcome based on the configured calculations and lookups**

Use the new `runExpressionSet` custom action.

**Run a decision matrix to match input values in a table to a row, and return the row's output values**

Use the new `runDecisionMatrix` custom action.

**New Metadata Types for Business Rules Engine**

Business Rules Engine has new metadata type and enumeration.

**Metadata Type****Stores the configuration of an expression set created using Business Rules Engine**

Use the new `ExpressionSetDefinition` object.

**Stores the configuration of a decision matrix created using Business Rules Engine**

Use the new `DecisionMatrixDefinition` object.

**Action Type****Run an expression set in a flow**

Use the new `runExpressionSet` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

**Run a decision matrix in a flow**

Use the new `runDecisionMatrix` value in the existing `actionType` field on the `FlowActionCall` subtype of the `Flow` metadata type.

**New Tooling API Objects in Business Rules Engine**

Use Tooling APIs to work with Business Rules Engine setup objects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Financial Services Cloud, Health Cloud, Manufacturing Cloud, Insurance, or Public Sector Solutions is enabled.

**Store information about an expression set**

Use the new `ExpressionSetDefinition` object.

**Store information about an expression set version**

Use the new `ExpressionSetDefinitionVersion` object.

**Store information about a decision matrix**

Use the new `DecisionMatrixDefinition` object.

**Store information about a decision matrix version**

Use the new `DecisionMatrixDefinitionVersion` object.

**Connect REST APIs**

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

**Invoke Expression Sets in Business Rule Engine**

Make a POST request to the new `/connect/business-rules/expressionSet` resource.

New request parameter: `expressionSetName`

New request body: Business Rules Input

New response body: Business Rules Result

**Perform a lookup on a decision matrix**

Make a POST request to the new `/connect/business-rules/decision-matrices` resource.

New request parameter: `matrixName`

New request body: Decision Matrix Lookup

New response body: Decision Matrix Lookup Result

**Perform a lookup on a decision table**

Make a POST request to the new `/connect/business-rules/decision-table` resource.

New request parameter: `decisionTableId`

New request body: Decision Table Input

New response body: Decision Table Outcome

**Decision Table**

Improve the performance of your decision table by splitting large amounts of data into multiple groups. Group your business rules with a frequently used input field.



**IN THIS SECTION:**[Enhance the Performance of Your Decision Table](#)

Group business rules to reduce the number of rows to process. For example, a company has 50,000 business rules to determine the discount percentage on their orders based on the product and quantity purchased. By grouping business rules with product, you can limit the number of rules to query to the ones in the group, instead of querying all the 50,000 business rules.

[Changed Objects in Decision Table](#)

Group the business rules of a decision table with the value of an input field.

[Changed Decision Table Metadata Types](#)

Make the most of the changed metadata type of Decision Table.

[Changed Tooling API Objects in Data Table](#)

Use Tooling APIs to work with the Decision Table setup objects.

[Use Decision Tables as Part of Business Rules Engine](#)

Decision tables are now available as a component of Business Rules Engine. You can now create decision tables, add decision tables to expression sets, and use decision tables independently in workflows that use Business Rules Engine. You can also use Business Rules Engine Connect APIs to integrate decision tables in workflows that are created using custom or third-party tools.

## Enhance the Performance of Your Decision Table

Group business rules to reduce the number of rows to process. For example, a company has 50,000 business rules to determine the discount percentage on their orders based on the product and quantity purchased. By grouping business rules with product, you can limit the number of rules to query to the ones in the group, instead of querying all the 50,000 business rules.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

**How:** From Setup, in the Quick Find box, enter *Decision Table*, and then select **Decision Table**. Define the decision table, and then select the input and output fields. For the input field that you want to use for grouping, use the Equals operator. Select **All conditions are met (AND)**, and then under Group Business Rules, select an input field.

**SEE ALSO:**

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

## Changed Objects in Decision Table

Group the business rules of a decision table with the value of an input field.

**View a batch job definition using the loyalty program process**

Use the new `isGroupByField` field on the `DecisionTableParameter` object.

**SEE ALSO:**

[Rebate Management Developer Guide: Decision Table Standard Objects \(can be outdated or unavailable during release preview\)](#)

## Changed Decision Table Metadata Types

Make the most of the changed metadata type of Decision Table.

**Group the business rules of a decision table**

Use the `isGroupByField` field on the `DecisionTableParameters` subtype of the `DecisionTable` metadata type. This field indicates whether an input field is used to group the business rules of the decision table.

SEE ALSO:

[Rebate Management Developer Guide: Decision Table Metadata API](#)(can be outdated or unavailable during release preview)

**Changed Tooling API Objects in Data Table**

Use Tooling APIs to work with the Decision Table setup objects.

**Group the business rules with an input value**

Use the new `IsGroupByField` field of the `DecisionTableParameter` object.

SEE ALSO:

[Rebate Management Developer Guide: Decision Table Setup Objects](#)(can be outdated or unavailable during release preview)

**Use Decision Tables as Part of Business Rules Engine**

Decision tables are now available as a component of Business Rules Engine. You can now create decision tables, add decision tables to expression sets, and use decision tables independently in workflows that use Business Rules Engine. You can also use Business Rules Engine Connect APIs to integrate decision tables in workflows that are created using custom or third-party tools.

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

SEE ALSO:

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

**Einstein Relationship Insights**

Learn about your prospects from your colleagues before you contact them. Broaden the scope of your relationship recommendations by exploring documents in Salesforce Files. Determine the data structure and how to process data by identifying structured relationships between Salesforce records. Correct misclassified person or company records. Learn about Einstein's brand changes.

IN THIS SECTION:

[Enhance Your Prospects with Recommendations from Colleagues](#)

Einstein Relationship Insights can now capture email and calendar metadata using Einstein Activity Capture. Sales reps can use the captured metadata to easily identify colleagues who have had email conversations or meetings with prospects. Sales reps can then learn about a contact from the colleagues or even request the colleagues to introduce them to the prospects.

[Expand Relationship Recommendation Scope with Salesforce Files](#)

Discover more connections and build a network of people and companies by exploring documents in Salesforce Files, such as the files in Chatter feeds and comments, records, and libraries. By including Salesforce Files as a content source, sales reps can view search results, evidence, and relationships from Salesforce Files documents that the reps own or have access to. Sales rep can then create and open records from the search results, and bookmark Salesforce Files documents.




### [Explore Structured Relationships Between Salesforce Records](#)

Sales teams can now view structured lookup relationships, master-detail relationships, and many-to-many relationships using junction records in the Einstein Relationship Insights relationship graph. Sales reps can identify structured relationships between relevant people and companies that they didn't know existed. Sales reps can also view the evidence of structured relationships.

### [Correct Misclassified Records](#)

Sales reps can now correct recommended person and company records that were misclassified. For example, while creating an account record, if you see a company-type record misclassified as a person-type record or vice versa, you can change the record to an organization record.

### [Updated Brand Guidelines](#)

To align with the latest brand guidelines for Einstein, we've updated Einstein icons and logos. Now  represents Einstein and the relationships on the interface instead of  and  used previously. We've also changed the window for empty state messages.

## Enhance Your Prospects with Recommendations from Colleagues

Einstein Relationship Insights can now capture email and calendar metadata using Einstein Activity Capture. Sales reps can use the captured metadata to easily identify colleagues who have had email conversations or meetings with prospects. Sales reps can then learn about a contact from the colleagues or even request the colleagues to introduce them to the prospects.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights and Einstein Activity Capture are enabled.

**How:** To capture metadata, enable Einstein Activity Capture in your org. To explore an account or contact, go to the account or contact, and then explore it from the Einstein Relationship Insights component. The relationship graph shows up to two connected colleagues with a solid line. To view how your colleague is connected to the prospect, hover over your colleague's record.

SEE ALSO:

[Salesforce Help: Find Colleagues Connected to Prospects with Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## Expand Relationship Recommendation Scope with Salesforce Files

Discover more connections and build a network of people and companies by exploring documents in Salesforce Files, such as the files in Chatter feeds and comments, records, and libraries. By including Salesforce Files as a content source, sales reps can view search results, evidence, and relationships from Salesforce Files documents that the reps own or have access to. Sales rep can then create and open records from the search results, and bookmark Salesforce Files documents.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**How:** From the Einstein Relationship Insights component settings page, under Connect Content Sources, select Salesforce Files as a content source. To explore an account or contact, go to the account or contact, and then explore it from the Einstein Relationship Insights component. Search with a keyword related to the account or contact. Search results show references from documents in Salesforce Files.

SEE ALSO:

[Salesforce Help: Outcomes of Connecting Salesforce Files as a Content Source \(can be outdated or unavailable during release preview\)](#)

## Explore Structured Relationships Between Salesforce Records

Sales teams can now view structured lookup relationships, master-detail relationships, and many-to-many relationships using junction records in the Einstein Relationship Insights relationship graph. Sales reps can identify structured relationships between relevant people and companies that they didn't know existed. Sales reps can also view the evidence of structured relationships.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**How:** Go to an account or contact, and then explore it from the Einstein Relationship Insights component. The relationship graph shows the structured relationships between two graph nodes with a solid line. To view evidence for the relationship, click a related account or contact record.

### SEE ALSO:

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

## Correct Misclassified Records

Sales reps can now correct recommended person and company records that were misclassified. For example, while creating an account record, if you see a company-type record misclassified as a person-type record or vice versa, you can change the record to an organization record.




**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**How:** Go to an account or contact, and then explore it from the Einstein Relationship Insights component. From the results, click **+** for a company-type or person-type record that's incorrectly classified, and then scroll through to create an organization record instead.

### SEE ALSO:

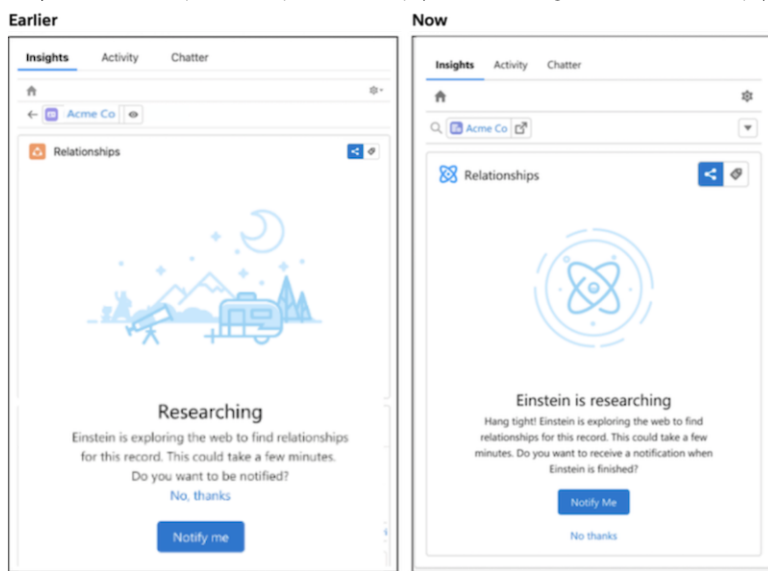
[Salesforce Help: Create a Record \(can be outdated or unavailable during release preview\)](#)

## Updated Brand Guidelines

To align with the latest brand guidelines for Einstein, we've updated Einstein icons and logos. Now  represents Einstein and the relationships on the interface instead of  and  used previously. We've also changed the window for empty state messages.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Einstein Relationship Insights is enabled.

**Why:** Here's a sample of the previous empty state message and the new empty state message.



## Intelligent Document Reader

Entering information from a handwritten intake application can be a tedious, error-prone, manual process. Intelligent Document Reader uses your AWS account to access Amazon Textract to get the correct data from the correct documents faster. With Intelligent Document Reader, data from uploaded documents such as applicants' identity and contact information is directly pulled into an online application record, reducing manual document input and management.

### IN THIS SECTION:

#### [Automate Data Capture with Mappings](#)

Automate data collection from customer-submitted documents by creating mappings. Simplify record management, reduce manual effort, and avoid errors in capturing customer data. Use the extracted data to update or create records, or to verify the accuracy of an existing record.

#### [Improve Data Extraction Efficiency by Using Confidence-Level Scores](#)

Health Cloud can help indicate values in a received document that require more attention. Users can quickly scan the extracted values that fall below a confidence-level score threshold you set, and fix them manually if needed. You can specify a threshold value from 0 through 100.

#### [Set Up Data Extraction Easily with Multiple Target Objects in Mappings](#)

Minimize your effort in setting up data extraction and reduce the number of mappings for a form by creating a single mapping with multiple target objects. Reset mapped fields with a single click, get an overall understanding of the mapped fields from the mapped fields summary, and easily identify objects with mapped fields.

#### [Share Form Fields Across Mappings for Document Type](#)

In the absence of a sample document, you can create mappings that share fields defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

#### [Save Your Partially Mapped Form Fields](#)

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.

### Enhanced Form Field Mapping

Map 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 First Name and Last Name fields 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 Document Reader performs additional processing to trim the special characters contained in a form field. This trimming ensures that 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 Document Reader processes only the field name.

### Refine Mappings by Deleting Unnecessary Forms

Review mappings to identify and delete forms that are no longer required. When you delete a form, the related field mappings are also deleted.

### Navigation Easily Between Form Pages

Navigate between the custom forms and form pages on the Mappings Definition page. Use the zoom-in and zoom-out buttons, or change the view from thumbnail to list view. The form highlights extracted fields, which makes it even more intuitive and easy to access the fields for mapping.

### Use Intelligent Document Reader in Regions Compliant for Data Residency

Intelligent Document Reader is compliant with data residency requirements of Australia, Canada, France, Germany, and the United Kingdom (UK). Extraction requests are sent to the AWS server based on the AWS region selected when creating the named credentials for your AWS account.

### Intelligent Document Reader Has New Objects

Use standard objects to create, update, and activate Intelligent Document Reader.

### Intelligent Document Reader Has New Metadata Types

Intelligent Document Reader has new metadata types.

### Intelligent Document Reader Has New Tooling API Objects

Use Tooling APIs to work with the Intelligent Form Reader setup objects.

### Connect REST API

Intelligent Document Reader REST API includes new calls.

## Automate Data Capture with Mappings

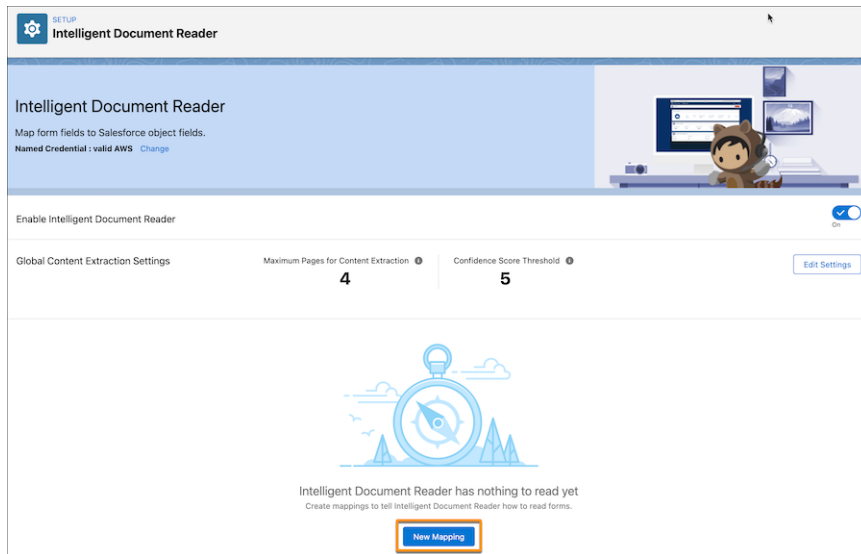
Automate data collection from customer-submitted documents by creating mappings. Simplify record management, reduce manual effort, and avoid errors in capturing customer data. Use the extracted data to update or create records, or to verify the accuracy of an existing record.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**Why:** Users often rely on scans of important documents when inputting or verifying important information. Manually entering field data based on scanned documents can be time consuming. Automatically extracting data from document files can speed up document-driven data capture processes.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. To create a mapping, click **New Mapping**. Select a form type and upload the document that you want to scan.



SEE ALSO:

[Salesforce Help: Create Mappings for Document Types](#)

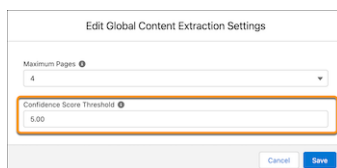
## Improve Data Extraction Efficiency by Using Confidence-Level Scores

Health Cloud can help indicate values in a received document that require more attention. Users can quickly scan the extracted values that fall below a confidence-level score threshold you set, and fix them manually if needed. You can specify a threshold value from 0 through 100.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with Intelligent Document Reader enabled.

**When:** You can define the confidence score threshold value in Intelligent Document Reader with Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. To edit the confidence score threshold value, click **Edit Settings**. Enter a threshold value in the Confidence Score Threshold field. The default value is 0.



The updated settings apply to all the field mappings.

SEE ALSO:

[Salesforce Help: Configure Global Content Extraction Settings](#)

## Set Up Data Extraction Easily with Multiple Target Objects in Mappings

Minimize your effort in setting up data extraction and reduce the number of mappings for a form by creating a single mapping with multiple target objects. Reset mapped fields with a single click, get an overall understanding of the mapped fields from the mapped fields summary, and easily identify objects with mapped fields.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Create a mapping or open an existing mapping. To select a target object, select a form's page, and then click the **Target Objects** dropdown. Map the form fields to the selected target object's fields. You can change the target object from the Target Objects dropdown to map the form fields to more than one object's fields.

The screenshot shows the 'Intelligent Document Reader' interface for a 'Driving License' mapping. The 'Target Objects' dropdown is highlighted with an orange box. Below it, there is a table for mapping form fields to target object fields. The table has two columns: 'Form Fields' and 'Target Object Fields'. The 'Form Fields' column lists fields like 3.DOB, 4b.EXP, 16.HGT, 5.DD, and TA.SAMPLECARD. The 'Target Object Fields' column has dropdown menus for each field. To the right of the table, there is a preview of a driving license document with the text 'Extraction completed' at the bottom.

Form Fields	Target Object Fields
1 3.DOB	Select a field...
2 4b.EXP	Select a field...
3 16.HGT	Select a field...
4 5.DD	Select a field...
5 TA.SAMPLECARD	Select a field...

SEE ALSO:

[Salesforce Help: Map Form Fields to Target Object Fields](#)

## Share Form Fields Across Mappings for Document Type

In the absence of a sample document, you can create mappings that share fields defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Create a mapping or open an existing mapping. To populate general form fields associated with this document type, regardless of specific sample documents, select the Default Fields thumbnail. The Default Fields thumbnail contains the mappings defined for a document type. Edit the required form field, map them to the target object fields, and then save the mapping.



## Save Your Partially Mapped Form Fields

A mapping typically contains fields that are auto-extracted from custom forms or added manually. You can now opt to map only a few form fields to the Target Object Fields and save them along with any unmapped form fields.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Create a mapping or open an existing mapping. In the Form Fields column, all the auto-extracted and added fields appear.

Map the required form fields to the Target Object Fields (1), and then save the mapping definition.

Any unmapped form fields are also saved for later editing (2).

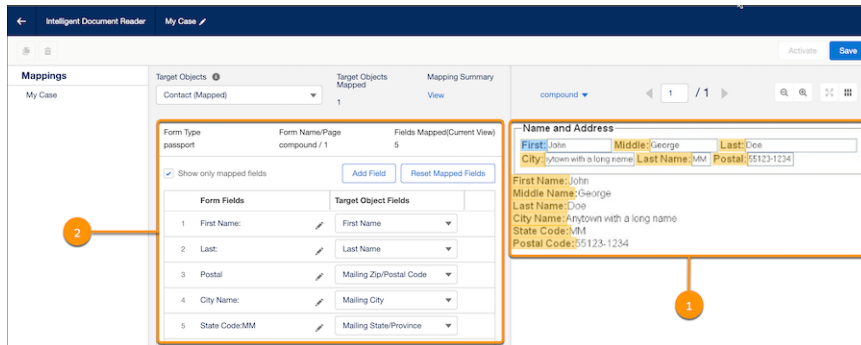
## Enhanced Form Field Mapping

Map 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 First Name and Last Name fields 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 and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Create a mapping or open an existing mapping.



Click the extracted form's 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 to the form fields (2).

## Accurately Extract Field Names

After extraction, Intelligent Document Reader performs additional processing to trim the special characters contained in a form field. This trimming ensures that 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 Document Reader processes only the field name.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.


**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Create a mapping or open an existing mapping. Click the extracted form's thumbnail. The auto-extracted keys appear in the Form Fields column with special characters. After the form is processed, ensure that no special characters are extracted.

## Refine Mappings by Deleting Unnecessary Forms

Review mappings to identify and delete forms that are no longer required. When you delete a form, the related field mappings are also deleted.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** From Setup, in the Quick Find box, enter *Intelligent Document Reader*, and then select **Intelligent Document Reader**. Open an existing mapping and click  next to the form name.

SEE ALSO:

[Salesforce Help: View and Manage Your Mappings](#)

## Navigation Easily Between Form Pages

Navigate between the custom forms and form pages on the Mappings Definition page. Use the zoom-in and zoom-out buttons, or change the view from thumbnail to list view. The form highlights extracted fields, which makes it even more intuitive and easy to access the fields for mapping.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

**How:** Create a mapping or open an existing mapping. Each page in the uploaded form appears as thumbnail. To define or change the mapping for fields on a page, select the page's thumbnail. The page's fields appear in the Form Fields column.

To navigate between the custom forms and the pages, use the navigation buttons (2).

You can change the view from a thumbnail to a list view (3).

To zoom into the uploaded document, use the zoom buttons (4).

The fields that are highlighted on the page (5, 6) and in the form field rows (7, 8) help in two-way intuitive navigation for mapping.

## Use Intelligent Document Reader in Regions Compliant for Data Residency

Intelligent Document Reader is compliant with data residency requirements of Australia, Canada, France, Germany, and the United Kingdom (UK). Extraction requests are sent to the AWS server based on the AWS region selected when creating the named credentials for your AWS account.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader enabled.

**When:** You can use Intelligent Document Reader with Financial Services Cloud and Health Cloud from July 19, 2022.

## Intelligent Document Reader Has New Objects

Use standard objects to create, update, and activate Intelligent Document Reader.

### View information extracted from the form.

Use the new `OcrDocumentScanResult` object.

### View information about a sample document or a document type that's used as a reference while extracting and mapping information from a customer form

Use the new `OcrSampleDocument` object.

### View information about the Salesforce object to which information from a form field is extracted and mapped

Use the new `OcrSampleDocumentField` object.

### View information about the fields that define a page in the OCR sample document

Use the new `OcrSampleDocumentPage` object.

### View information about the details of the object to which information from a form is extracted and mapped

Use the new `OcrTargetObject` object.

### View information about the mapping between form fields and fields in a Salesforce object

Use the new `OcrTargetObjFieldMapping` object.

### View information about the mapping between a form and a Salesforce object

Use the new `OcrTemplate` object.

### View information about the relationship between an OCR template and an OCR sample document

Use the new `OcrTemplateSampleDocument` object.

## Intelligent Document Reader Has New Metadata Types

Intelligent Document Reader has new metadata types.

### Extract and map information from a form using a document type

Use the new `OcrSampleDocument` metadata type.

### Map a form and a Salesforce object using Intelligent Form Reader

Use the new `OcrTemplate` metadata type.

## Intelligent Document Reader Has New Tooling API Objects

Use Tooling APIs to work with the Intelligent Form Reader setup objects.

### Store information about the mapping between a form and a Salesforce object

Use the `OcrTemplate` object.

### Store information about the Salesforce object into which information from a form is extracted and mapped

Use the `OcrTargetObject` object.

**Store information about the form field whose value is extracted and mapped to a Salesforce object**

Use the `OcrSampleDocumentField` object.

**Store information about how data from a form field is mapped to fields in a Salesforce object**

Use the `OcrTargetObjFieldMapping` object.

**Store information about the fields that define a page in the OCR sample document**

Use the `OcrSampleDocumentPage` object.

**Store information about the document type that's used as a reference while mapping information from a form**

Use the `OcrSampleDocument` object.

**Store information about the relationship between an OCR template and an OCR sample document**

Use the `OcrTemplateSampleDocument` object.

## Connect REST API

Intelligent Document Reader REST API includes new calls.

## Document Reader Mappings

**Retrieve the mappings between the values of the keys extracted from a document and the Salesforce object fields**

Make a GET request to the new `/connect/form-reader/mapping` resource.

New request body: Map Extracted Text Input

New response body: Form Reader Map Output

**Create an OCR document scan result record using the extracted text from a document**

Make a POST request to the new

`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults` resource.

New response body: Trigger Text Extraction Output

**Retrieve details of text extracted from the latest version of the OCR document scan result**

Make a GET request to the new

`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults` resource.

New response body: Document Extraction Output

**Retrieve the active OCR templates**

Make a GET request to the new `/connect/form-reader/ocrTemplates` resource.

New response body: Template Collection Output

**Retrieve details of an active OCR template**

Make a GET request to the new `/connect/form-reader/ocrTemplates/${ocrTemplateId}` resource.

New response body: Template Detail Output

**Retrieve field mappings**

Make a GET request to the new

`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrTemplates/${ocrTemplateId}/targetObjectFieldMappings` resource.

New response body: Form Reader Map Output

## Intelligent Form Reader

Now, setting up data extraction and managing mappings is simpler and easier. You can create a single mapping with multiple objects and delete forms in a mapping. Intelligent Form Reader is compliant with data residency requirements of some more countries.

### IN THIS SECTION:

#### [Set Up Data Extraction Easily with Multiple Target Objects in Mappings](#)

Minimize your effort in setting up data extraction and reduce the number of mappings for a form by creating a single mapping with multiple target objects. Reset mapped fields with a single click, get an overall understanding of the mapped fields from the mapped fields summary, and easily identify objects with mapped fields.

#### [Refine Mappings by Deleting Unnecessary Forms](#)

Review mappings to identify and delete forms that are no longer required. When you delete a form, the related field mappings are also deleted.

#### [Extended Data Residency Compliance](#)

Intelligent Form Reader is now compliant with data residency requirements of France, Germany, and the United Kingdom (UK). Document extraction requests from these regions are redirected to the respective AWS region.

#### [Connect REST API](#)

Intelligent Form Reader REST API includes new calls.

## Set Up Data Extraction Easily with Multiple Target Objects in Mappings

Minimize your effort in setting up data extraction and reduce the number of mappings for a form by creating a single mapping with multiple target objects. Reset mapped fields with a single click, get an overall understanding of the mapped fields from the mapped fields summary, and easily identify objects with mapped fields.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions of Financial Services Cloud, Health Cloud, and Public Sector Cloud where Intelligent Form Reader is enabled.

**How:** From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Create a mapping or open an existing mapping. To select a target object, select a form's page, and then click the **Target Objects** dropdown. Map the form fields to the selected target object's fields. You can change the target object from the Target Objects dropdown to map the form fields to more than one object's fields.

The screenshot shows the 'Intelligent Form Reader' interface for 'Referral Form Data'. The 'Mappings' tab is selected. A 'Target Objects' dropdown menu is highlighted with an orange box. Below it, the 'Form Type' is 'Referral'. There are buttons for 'Add Field' and 'Reset Mapped Fields'. A table lists 'Form Fields' and 'Target Object Fields'.

Form Fields	Target Object Fields
1 Email Address	Select a field...
2 First Name	Select a field...
3 Date of Birth	Select a field...
4 Zip	Select a field...
5 Last Name	Select a field...
6 City	Select a field...
7	Select a field...
8 Phone #	Select a field...


SEE ALSO:

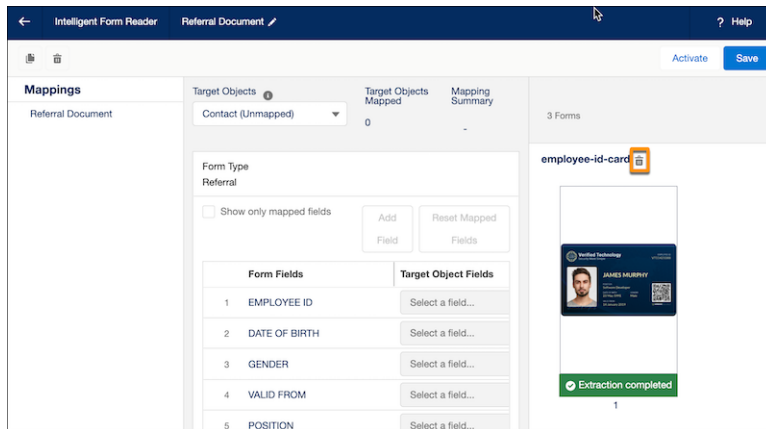
[Salesforce Help: Map Form Fields to Target Object Fields \(can be outdated or unavailable during release preview\)](#)

## Refine Mappings by Deleting Unnecessary Forms

Review mappings to identify and delete forms that are no longer required. When you delete a form, the related field mappings are also deleted.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions of Financial Services Cloud, Health Cloud, and Public Sector Cloud where Intelligent Form Reader is enabled.

**How:** From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Open an existing mapping and click  next to the form name.



SEE ALSO:

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

## Extended Data Residency Compliance

Intelligent Form Reader is now compliant with data residency requirements of France, Germany, and the United Kingdom (UK). Document extraction requests from these regions are redirected to the respective AWS region.

## Connect REST API

Intelligent Form Reader REST API includes new calls.

### Form Reader Mappings

#### Create an OCR document scan result record using the extracted text from a document

Make a POST request to the new

`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults` resource.

New response body: Trigger Text Extraction Output

#### Retrieve details of text extracted from the latest version of the OCR document scan result

Make a GET request to the new

`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults` resource.

New response body: Document Extraction Output

#### Retrieve the active OCR templates

Make a GET request to the new `/connect/form-reader/ocrTemplates` resource.

New response body: Template Collection Output

#### Retrieve details of an active OCR template

Make a GET request to the new `/connect/form-reader/ocrTemplates/${ocrTemplateId}` resource.

New response body: Template Detail Output



**Retrieve field mappings**

Make a GET request to the new

`/connect/form-reader/contentDocuments/{contentDocumentId}/ocrTemplates/{ocrTemplateId}/targetObjectFieldMappings` resource.

New response body: Form Reader Map Output

**SEE ALSO:**

[Industries Common Resources Developer Guide: Intelligent Form Reader](#)(can be outdated or unavailable during release preview)

## Sentiment Insights

Analyze customer sentiment with a dedicated AWS account using the Amazon Comprehend BatchDetectSentiment API. Sentiment Insights categorizes customer sentiment as positive, negative, mixed, or neutral. Analyze customer sentiment on responses to text-based survey questions, identify positive and negative trends, and discover areas of improvement.

**IN THIS SECTION:**[Get Qualitative Feedback on Survey Responses](#)

Understand the sentiment behind responses to text-based survey questions by using Sentiment Insights. Sentiment Insights helps you to identify when the participants' sentiment turns negative, so your customer service agents can take action to turn around those sentiments.

[Sentiment Insights Has New Objects](#)

Use the standard objects to view the result of the sentiment analysis.

## Get Qualitative Feedback on Survey Responses

Understand the sentiment behind responses to text-based survey questions by using Sentiment Insights. Sentiment Insights helps you to identify when the participants' sentiment turns negative, so your customer service agents can take action to turn around those sentiments.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Feedback Management where Sentiment Insights is enabled.

**When:** You can use Sentiment Insights with Feedback Management from July 19, 2022.

**SEE ALSO:**

[Get Qualitative Feedback on Text Responses with Sentiment Insights](#)

[Sentiment Insights](#)

## Sentiment Insights Has New Objects

Use the standard objects to view the result of the sentiment analysis.

**View the result of sentiment analysis performed on a text field**

Use the new `AISentimentResult` object.

## Record Alerts

Enhancements to record alerts include support for reporting, a generic FlexCard for non-aggregation scenarios, and more.

## IN THIS SECTION:

### [New Snooze Until Date on Record Alerts](#)

When a user snoozes a record alert, the new Snooze Until Date field is updated for your reference. The Effective Start Date field is unchanged.

### [Generate Reports on Record Alerts](#)

Review usage patterns to make your record alerts more effective for your agents. Review the alerts that are being created and how quickly they're being resolved. Create reports on the record alerts that are stored in Salesforce. Previously, the Record Alerts object didn't support reporting.

### [OmniStudio Alert Card Is Now Available in the Salesforce Platform](#)

The OmniStudio AlertCard and related components and integration procedures are now a part of the Salesforce platform. You no longer have to install a datapack from a Git Hub repository.

### [Default Icons Are Added to New Record Alert Severity Values](#)

When you create a value for the Severity field, the warning icon is associated with the field automatically. Your users can change the icon as needed.

### [Provide Your Agents with Localized Record Alerts](#)

Localize record alert subject lines, descriptions, and categories. Enable your agents to view record alerts in their preferred language.

### [Use the New Generic Alert Card for Non-Aggregation Scenarios](#)

Record alerts for Financial Service Cloud aggregate and show alerts for financial account transactions, financial accounts, and person accounts in a hierarchical view. The generic alert card doesn't aggregate child record alerts. If you don't need aggregation, use the new generic alert card. Setup is quicker and easier because you don't have to define the properties related to aggregation. The generic alert card name is ServiceExcellenceGenericAlertCard.

### [Search the Record Alerts List View](#)

You can now search by subject, description, and severity in the Record Alerts list view. Previously, the Record Alert list view didn't support search.

### [Connect REST API](#)

Record Alerts REST API includes new calls.

## New Snooze Until Date on Record Alerts

When a user snoozes a record alert, the new Snooze Until Date field is updated for your reference. The Effective Start Date field is unchanged.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** On the Record Alerts tab, click **New** or open an existing record alert. Notice the new Snooze Until Date field.

## Generate Reports on Record Alerts

Review usage patterns to make your record alerts more effective for your agents. Review the alerts that are being created and how quickly they're being resolved. Create reports on the record alerts that are stored in Salesforce. Previously, the Record Alerts object didn't support reporting.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** On the Report Types page in Setup, create a custom report type using Record Alerts as the primary object. Then create reports using that type.

SEE ALSO:

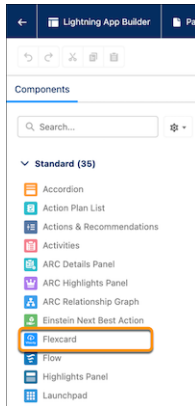
[Salesforce Help: Build a Record Alert Report \(can be outdated or unavailable during release preview\)](#)

## OmniStudio Alert Card Is Now Available in the Salesforce Platform

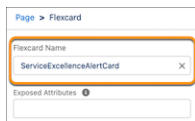
The OmniStudio AlertCard and related components and integration procedures are now a part of the Salesforce platform. You no longer have to install a datapack from a Git Hub repository.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** In Lightning App Builder, on the record page that you're editing, drag the **FlexCard** standard component from the Components panel to the Lightning page canvas. Position it where you want it to appear.



Select the FlexCard component and in the properties panel, select the card you want to use from the FlexCard Name list.



SEE ALSO:

[Salesforce Help: Configure Record Alerts in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Default Icons Are Added to New Record Alert Severity Values

When you create a value for the Severity field, the warning icon is associated with the field automatically. Your users can change the icon as needed.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Salesforce Help: Customize Severity Values for Record Alerts \(can be outdated or unavailable during release preview\)](#)

## Provide Your Agents with Localized Record Alerts

Localize record alert subject lines, descriptions, and categories. Enable your agents to view record alerts in their preferred language.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Use Translation Workbench to export record alert data and record alert category metadata to hand over to your translation team. Then import the translated files.

SEE ALSO:

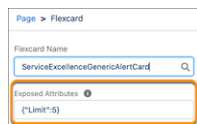
[Salesforce Help: Manage Your Translations](#)

## Use the New Generic Alert Card for Non-Aggregation Scenarios

Record alerts for Financial Service Cloud aggregate and show alerts for financial account transactions, financial accounts, and person accounts in a hierarchical view. The generic alert card doesn't aggregate child record alerts. If you don't need aggregation, use the new generic alert card. Setup is quicker and easier because you don't have to define the properties related to aggregation. The generic alert card name is `ServiceExcellenceGenericAlertCard`.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**How:** Add the FlexCard standard component to a Lightning page from the Lightning App Builder. Click the FlexCard component and in the properties panel, select the **ServiceExcellenceGenericAlertCard** from the FlexCard Name list.



SEE ALSO:

[Salesforce Help: Configure Record Alerts in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Search the Record Alerts List View

You can now search by subject, description, and severity in the Record Alerts list view. Previously, the Record Alert list view didn't support search.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

## Connect REST API

Record Alerts REST API includes new calls.

### Record Alerts

#### Retrieve active bulk record alerts for Salesforce objects

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `whatIds`

New response body: Record Alert Collection Map

#### Retrieve active bulk record alerts for parent accounts

Make a GET request to the new `/services/data/v55.0/recordalerts/batch` resource.

Required request parameters: `parentIds`

New response body: Record Alert Collection Map

**Dismiss or snooze bulk internal record alerts**

Make a POST request to the new `/services/data/v55.0/recordalerts/ids/actions` resource.

New Request body: Record Alert Bulk Action Input

New response body: Record Alert Action Collection Map

**Dismiss or snooze bulk external record alerts**

Make a POST request to the new `/services/data/v55.0/recordalerts/externalIds/actions` resource.

New Request body: Record Alert Bulk Action Input

New response body: Record Alert Action Collection Map

**SEE ALSO:**

[Industries Common Resources Developer Guide: Record Alert APIs \(can be outdated or unavailable during release preview\)](#)

## Intelligent Document Automation

Salesforce can now use checkbox values and other options from uploaded forms when creating records. Also, when creating a record, Salesforce can now automatically create Document Checklist Items.



**Note:** You need the `IntelligentDocumentAutomation` org permission to use this feature.

**IN THIS SECTION:**[Map More Field Types from Forms](#)

You can now map checkbox values in documents and forms uploaded to Salesforce to checkbox fields in Salesforce objects. You can also map options on forms to picklist values. When a user transforms or reviews a document, the checkboxes and picklists are automatically populated based on the selections in the uploaded form.

[Create Document Checklist Items Automatically](#)

The Document Checklist Item object links an uploaded form to a Salesforce record created using the form. When users create a record by transforming a document, Salesforce can now create a Document Checklist Item automatically.

**SEE ALSO:**

[Salesforce Administration Guide: Intelligent Document Automation](#)

[New Connect REST API Resources](#)

## Map More Field Types from Forms

You can now map checkbox values in documents and forms uploaded to Salesforce to checkbox fields in Salesforce objects. You can also map options on forms to picklist values. When a user transforms or reviews a document, the checkboxes and picklists are automatically populated based on the selections in the uploaded form.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Intelligent Form Reader are enabled.

**Who:** This feature is available to users who are assigned the Intelligent Form Reader user permission.

**Why:** For example, you might map a No Known Allergies checkbox in a form to a custom **No Known Allergies** checkbox in the Account object. If the checkbox is selected in the form, the value of the checkbox is updated on the record in Salesforce.

For options on a form, suppose an insurance policy requires information about chronic conditions. Let's say the options are Arthritis, Asthma, Diabetes, and Osteoporosis. You can have a **Chronic Conditions** picklist field in the Account object and add the four options as the picklist values. When users create a record using the policy document, the option selected in the form is auto-selected in the Salesforce record.

**How:** From Setup, in the Quick Find box, enter *Intelligent Form Reader*, and then select **Intelligent Form Reader**. Create mappings between checkbox fields on a form and Salesforce checkboxes or between options and picklist values per your needs.

SEE ALSO:

[Create Document Types and Mappings](#)

[Map Form Fields to Target Object Fields](#)

## Create Document Checklist Items Automatically

The Document Checklist Item object links an uploaded form to a Salesforce record created using the form. When users create a record by transforming a document, Salesforce can now create a Document Checklist Item automatically.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud and Intelligent Form Reader are enabled.

**Who:** This feature is available to users who are assigned Health Cloud and the Health Cloud platform permission set licenses and the Document Checklist Item permission set. Users must also have full read-write access to these objects:

- Document Checklist Item
- Location
- Ocr Document Scan Result
- Received Document

**How:** In the App Launcher, enter *Received Documents* and select **Received Documents**. Open the Received Document record that has the uploaded form you want to create a Document Checklist Item for and click **Transform Document**. In the Transform Document window, select the pages to include, use the Rotate icon to fix any page orientation issues, and specify the Salesforce record (existing or new) with which you want to associate the form. Finally, select the **Create document checklist item automatically** checkbox, specify the document type, and click **Save**.

SEE ALSO:

[Set Up Intelligent Document Automation Users](#)

[Use Data from a Document](#)

[Assign the Document Checklist Permission Set](#)

## Marketing

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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

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Forecast types are grouped by user role, including quantity measures, schedule dates, and product dates. Mobile Publisher updates include Enhanced Mobile App Security (pilot), default bottom tab bar navigation visibility, and new navigation features. In Briefcase Builder, related record priming is generally available, higher record limits offer increased flexibility, and new filters were added.

IN THIS SECTION:

[Salesforce Mobile App](#)

Forecast types are grouped by user role, including quantity measures, schedule dates, and product dates.

[Mobile Publisher](#)

Enhanced Mobile App Security (pilot) comes to Mobile Publisher, Publisher Playground app supports Lightning Web Runtime (LWR), and bottom tab bar navigation is visible by default.

[Notifications](#)

Reach your users on Slack with important information.

[Briefcase Builder](#)

Distribute records across your active briefcases with more flexibility using a higher record limit per object. Filter records by a user ID with a new Current User ID filter value. Related record priming is now generally available.

[General Mobile Updates](#)

Replace native APIs for creating notifications from Lightning web components. Disable pull-to-refresh on a per page basis to eliminate data loss due to accidental refreshes.

## Salesforce Mobile App

Forecast types are grouped by user role, including quantity measures, schedule dates, and product dates.

IN THIS SECTION:

[Everything That's New in the Salesforce Mobile App](#)

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

## Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.



Most features become available for the Salesforce mobile app the week of June 13, 2022.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<b>Sales Features</b>			
<a href="#">View More Forecast Types in the Salesforce Mobile App</a> on page 473	✓	✓	✓
<b>Access and Security</b>			
<a href="#">Enforcing Certificate Pinning Available for Android</a> on page 473	✓		✓

## View More Forecast Types in the Salesforce Mobile App

See and use forecast types that use opportunity revenue, opportunity products, opportunity splits, overlay splits, and product schedules grouped by user role. For example, you can view your forecast by opportunity splits. Previously, in the Salesforce mobile app, you could only view forecast types that used opportunity revenue measures.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

[View All User Role-Based Forecast Types in the Salesforce Mobile App](#)

## Enforcing Certificate Pinning Available for Android

More protection has been built into the enhanced mobile security for the Salesforce mobile app. You can now enforce certificate pinning for Android. If a user tries to use the app and the server's certificate doesn't match the expected value, a secure connection isn't established. These new policies further secure your Salesforce app data and users' personal data.

**Where:** Available for an extra cost for the Salesforce mobile app in all editions, except Essentials and Database.com.

**Who:** Available for users with the Enforce Enhanced Mobile App Security user permission.

**How:** For more information, see [Configure Authentication Server Certificate Pin](#).

## Mobile Publisher

Enhanced Mobile App Security (pilot) comes to Mobile Publisher, Publisher Playground app supports Lightning Web Runtime (LWR), and bottom tab bar navigation is visible by default.

IN THIS SECTION:

[Mobile Publisher Requirements](#)

Salesforce is revising the requirements for using the Mobile Publisher for Salesforce App and Experience Cloud app. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the experience.

[Plan for Managed Public Option for Android's Retirement](#)

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement in Spring '23, scheduled for February 2023.

### [Enhanced Mobile App Security Integration \(Pilot\)](#)

Mobile Application Management (MAM) with Enhanced Mobile App Security comes to Mobile Publisher. Enhanced Mobile App Security provides a configurable layer of security at the app level. You can configure a range of security policies to limit users' access and actions, and you can specify the severity of violations. You can also monitor user actions required for your compliance checks.

### [Lightning Web Runtime \(LWR\) Support on the Publisher Playground App](#)

Test your Lightning Web Runtime (LWR) sites on the Publisher Playground app to understand how it functions as a mobile app. Mobile Publisher wants to give you a way to preview, test, tweak, and fix your LWR site configurations in the Publisher Playground app before publishing your branded apps.

### [Access to Mobile Device Contacts Comes to Mobile Publisher Apps](#)

Use the ContactsService API to create a customized contact import feature to create or update records with contact data. A contact import feature tailored to *your* audience makes adding contact information to your mobile app from contacts on your mobile device seamless.

### [Let Experience Cloud Site Users Deactivate Their Account](#)

Late in Spring '22, the Customizable User Settings component for Aura sites was updated to include properties that let your users deactivate their account.

### [Allow App Buyers Access to External Accounts for B2B Stores](#)

Store buyers who use your Mobile Publisher for Experience Cloud apps can now switch to an external account. Previously, this feature was available only for mobile B2B Commerce sites accessed using a web browser.

### [Force Experience Cloud App Users to Update for Enhanced Domains](#)

The Enable Enhanced Domains release update impacts Mobile Publisher apps that have a version number lower than 10.0 and that don't use a custom Experience Cloud site domain. Use the Mobile Publisher App Update component to force your app users to update to app version 10.0 so that your apps continue working when enhanced domains are enabled in your org. Before the update, apps with a version lower than 10.0 were unable to perform the automatic redirect to the new URL format introduced by Enhanced Domains. Version 10.0 of your apps is available from the App Store and Google Play. The Mobile Publisher App Update component is available as an AppExchange package.

### [Bottom Tab Bar Navigation Is Visible by Default](#)

Now when you create an app with Mobile Publisher, the bottom tab bar navigation is visible in the app with two preconfigured tabs: Home and User Settings. To customize the tab bar, you can add more navigation tabs and adjust the look and feel of the tabs to match your branding. And if you don't want bottom tab bar navigation, you can disable it.

### [Make Navigation Easy for Your Users](#)

Make navigation easier for your users when you add a hamburger menu in Android and iOS, and a back button in iOS, to your Mobile Publisher for Experience Cloud apps.

## Mobile Publisher Requirements

Salesforce is revising the requirements for using the Mobile Publisher for Salesforce App and Experience Cloud app. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the experience.

### Mobile Platform Requirements

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

## Operating System and Version Requirements

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Android 8.0 or later

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iOS 14.0 or later

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## Mobile Devices Used for Testing

Salesforce performs automated and manual testing of the Mobile Publisher for Salesforce App and Experience Cloud app for iOS and Android on a select set of mobile devices. Here's the list of devices for Summer '22.

Platform	Phones	Tablets
<b>Android</b>	<ul style="list-style-type: none"> <li>Google Pixel 6 / 6 Pro</li> <li>Samsung Galaxy S21</li> <li>Samsung Galaxy S20 / S20+</li> <li>Samsung Galaxy S10 / S10+ / S10e</li> <li>Samsung Galaxy S9 / S9+</li> <li>Samsung Galaxy S8 / S8+</li> <li>Samsung Galaxy S7</li> <li>Samsung Galaxy Note 10+</li> <li>Samsung Galaxy Note 9</li> </ul>	<ul style="list-style-type: none"> <li>Samsung Galaxy Tab A (8 inch)</li> <li>Samsung Galaxy Tab S7</li> <li>Samsung Galaxy Tab S6</li> </ul>
<b>iOS</b>	<ul style="list-style-type: none"> <li>iPhone 13 / Pro / Pro Max</li> <li>iPhone 12 / Pro / Pro Max</li> <li>iPhone 11 / Pro / Pro Max</li> <li>iPhone XR</li> <li>iPhone XS / XS Max</li> <li>iPhone X</li> <li>iPhone 8 / 8 Plus</li> <li>iPhone 7 / 7 Plus</li> <li>iPhone SE</li> </ul>	<ul style="list-style-type: none"> <li>iPad Pro (10.5-inch, 11-inch)</li> <li>iPad Pro (9.7-inch, 6th generation and later)</li> <li>iPad Air 2</li> <li>iPad Mini 4</li> </ul>

Customers aren't blocked from using Mobile Publisher for Salesforce App on untested devices as long as they meet current platform requirements. It's possible Salesforce can't replicate some issues for customers using Mobile Publisher for Salesforce App on untested devices on due to manufacturer-specific customizations. The list of Salesforce-tested devices is subject to change, with or without advance notice.

## Plan for Managed Public Option for Android's Retirement

The Managed Public Option for Mobile Publisher on Android devices is scheduled for retirement in Spring '23, scheduled for February 2023.

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

**Why:** In Spring '23, scheduled for February 2023, Salesforce plans to 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:

[Knowledge Article: Mobile Publisher Android - Managed Public Option Retirement](#)

## Enhanced Mobile App Security Integration (Pilot)

Mobile Application Management (MAM) with Enhanced Mobile App Security comes to Mobile Publisher. Enhanced Mobile App Security provides a configurable layer of security at the app level. You can configure a range of security policies to limit users' access and actions, and you can specify the severity of violations. You can also monitor user actions required for your compliance checks.

**Where:** This change applies to Mobile Publisher setup accessed through Lightning Experience 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.

SEE ALSO:

[Salesforce Help: Mobile Application Management \(MAM\) with Enhanced Mobile App Security](#)

## Lightning Web Runtime (LWR) Support on the Publisher Playground App

Test your Lightning Web Runtime (LWR) sites on the Publisher Playground app to understand how it functions as a mobile app. Mobile Publisher wants to give you a way to preview, test, tweak, and fix your LWR site configurations in the Publisher Playground app before publishing your branded apps.

**Where:** This change applies to the Publisher Playground app.



**Note:** Testing LWR sites is limited to the Publisher Playground app. Building and publishing LWR apps through Mobile Publisher isn't available in Summer '22.


SEE ALSO:

[Lightning Web Runtime Developer Guide: Introduction to Lightning Web Runtime on Node.js](#)

## Access to Mobile Device Contacts Comes to Mobile Publisher Apps

Use the ContactsService API to create a customized contact import feature to create or update records with contact data. A contact import feature tailored to *your* audience makes adding contact information to your mobile app from contacts on your mobile device seamless.

**Where:** This change applies to the Mobile Publisher apps.

 **Note:** Using the ContactsService API to create a contact import features only works in the mobile app, and not on mobile or desktop web.

SEE ALSO:

[Access Device Contacts from a Lightning Web Component](#)

## Let Experience Cloud Site Users Deactivate Their Account

Late in Spring '22, the Customizable User Settings component for Aura sites was updated to include properties that let your users deactivate their account.

**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](#)

## Allow App Buyers Access to External Accounts for B2B Stores

Store buyers who use your Mobile Publisher for Experience Cloud apps can now switch to an external account. Previously, this feature was available only for mobile B2B Commerce sites accessed using a web browser.

**Where:** This change applies to Mobile Publisher for Experience Cloud apps based on [Aura sites](#), in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Configure the External Managed Account related list to authorize external account access. Then add the Account Switcher component to the buyer's user profile menu so that they can switch to the target account.

SEE ALSO:

[Salesforce Help: Allow External Users to Manage Other Accounts with Account Switcher \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Allow Buyers Access to External Accounts for B2B Stores \(can be outdated or unavailable during release preview\)](#)

## Force Experience Cloud App Users to Update for Enhanced Domains

The Enable Enhanced Domains release update impacts Mobile Publisher apps that have a version number lower than 10.0 and that don't use a custom Experience Cloud site domain. Use the Mobile Publisher App Update component to force your app users to update to app version 10.0 so that your apps continue working when enhanced domains are enabled in your org. Before the update, apps with a version lower than 10.0 were unable to perform the automatic redirect to the new URL format introduced by Enhanced Domains. Version 10.0 of your apps is available from the App Store and Google Play. The Mobile Publisher App Update component is available as an AppExchange package.

**Where:** This change applies to apps created with Mobile Publisher for your Experience Cloud [Aura sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** When the Mobile Publisher App Update Lightning component is installed in your org from the AppExchange and added to your site, app users that run an old version are asked to update their app. For more information and the steps to take to implement this component, refer to the knowledge article [Mobile Publisher for Experience Cloud Apps and Enhanced Domains](#).

SEE ALSO:

[AppExchange: Mobile Publisher App Update component](#)

## Bottom Tab Bar Navigation Is Visible by Default

Now when you create an app with Mobile Publisher, the bottom tab bar navigation is visible in the app with two preconfigured tabs: Home and User Settings. To customize the tab bar, you can add more navigation tabs and adjust the look and feel of the tabs to match your branding. And if you don't want bottom tab bar navigation, you can disable it.

**Where:** This change applies to apps created with Mobile Publisher for your Experience Cloud [Aura sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Experience Builder, navigate to Settings and then to the Mobile Publisher page. On the Tab Bar Navigation tab, add more menu items to your navigation bar.

The screenshot shows the 'Mobile Publisher' settings page with the 'TAB BAR NAVIGATION' tab selected. It features a table with two preconfigured items: 'Home' and 'User Settings'. Each item has a dropdown menu for deletion. There is also an 'Add Menu Item' button.

PAGE	NAME	URL
Home	Home	<a href="https://mysite.home.com/s/">https://mysite.home.com/s/</a>
User Settings	User Settings	<a href="https://mysite.settings.com/s/">https://mysite.settings.com/s/</a>

To specify the look and feel of the navigation tabs, go to Mobile Publisher, and click the Tab Bar Style tab.

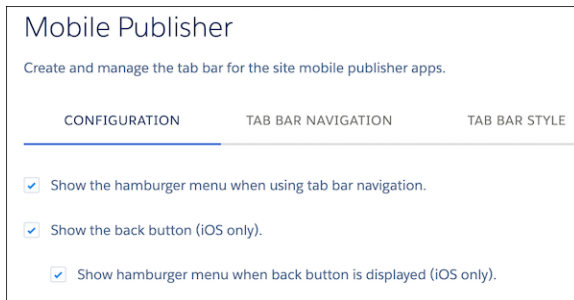
To disable the tab bar, from the Tab Bar Navigation tab, use the dropdown menu associated with each menu item to delete each and every menu item.

## Make Navigation Easy for Your Users

Make navigation easier for your users when you add a hamburger menu in Android and iOS, and a back button in iOS, to your Mobile Publisher for Experience Cloud apps.

**Where:** This change applies to apps created with Mobile Publisher for Experience Cloud for [Aura sites](#) in Enterprise, Performance, Unlimited, and Developer editions.

**How:** The navigation features are available on the Customer Account Portal, Partner Central, Customer Service, Help Center, and Build Your Own (Aura) templates. In Experience Builder, go to Settings and then the Mobile Publisher page. Under the Configuration tab, select the settings for the navigation that you want to use in your app.



## Notifications

Reach your users on Slack with important information.

### IN THIS SECTION:

#### [Stay Connected with Custom Notifications on Slack](#)

You now have another way to send timely information to your team. In addition to custom desktop and mobile notifications, you can create custom notifications for Slack. You can also clone some standard notifications that are enabled for Slack into a new custom Slack notification. By cloning a standard notification, you can keep and refine the content as you see fit.

## Stay Connected with Custom Notifications on Slack

You now have another way to send timely information to your team. In addition to custom desktop and mobile notifications, you can create custom notifications for Slack. You can also clone some standard notifications that are enabled for Slack into a new custom Slack notification. By cloning a standard notification, you can keep and refine the content as you see fit.

**Where:** This change applies to Lightning Experience in all editions except Database.com.

**How:** In Setup, enable Salesforce for Slack Integrations.

### SEE ALSO:

[Enable Salesforce for Slack Integrations](#)

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

## Briefcase Builder

Distribute records across your active briefcases with more flexibility using a higher record limit per object. Filter records by a user ID with a new Current User ID filter value. Related record priming is now generally available.

### IN THIS SECTION:

#### [Allocate Records to Your Mobile Workforce with More Flexibility](#)

You can now allocate up to 50,000 records per object in each briefcase, up from the previous limit of 2,000 records per object. This change gives you more flexibility to distribute records across your active briefcases. To help you customize within the record limit, enhancements in the Briefcase Builder setup wizard now give you in-context updates on how your settings affect the number of records returned.

### [Filter Records by User ID](#)

When you configure your object rules for a briefcase, you can now select a user ID as a filter value. This filter value is called Current User ID, and it's available for ID-based record filter criteria, such as Owner ID, Created By ID, and Last Modified ID.

### [Get Relevant Data with Related Record Priming \(Generally Available\)](#)

Related record priming, which is a feature that you can use to select and prime a subset of records for offline users, is now generally available.

## Allocate Records to Your Mobile Workforce with More Flexibility

You can now allocate up to 50,000 records per object in each briefcase, up from the previous limit of 2,000 records per object. This change gives you more flexibility to distribute records across your active briefcases. To help you customize within the record limit, enhancements in the Briefcase Builder setup wizard now give you in-context updates on how your settings affect the number of records returned.

**Where:** This change applies to Lightning Experience desktop and in Salesforce with Field Service (FS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android.

SEE ALSO:

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

## Filter Records by User ID

When you configure your object rules for a briefcase, you can now select a user ID as a filter value. This filter value is called Current User ID, and it's available for ID-based record filter criteria, such as Owner ID, Created By ID, and Last Modified ID.

**Where:** This change applies to Lightning Experience desktop and in Salesforce with Field Service (FS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android.

## Get Relevant Data with Related Record Priming (Generally Available)

Related record priming, which is a feature that you can use to select and prime a subset of records for offline users, is now generally available.

**Where:** This change applies to Lightning Experience desktop and in Salesforce with Field Service (FS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android.

SEE ALSO:

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

## General Mobile Updates

Replace native APIs for creating notifications from Lightning web components. Disable pull-to-refresh on a per page basis to eliminate data loss due to accidental refreshes.

IN THIS SECTION:

### [Prepare for New Alert, Confirm, and Prompt Modules and Components](#)

Chrome and Safari plan to end support for cross-origin use of the `window.alert()`, `window.confirm()`, and `window.prompt()` native APIs. As a solution, there are new modules and components that function like their API counterparts.



### [Disable Pull-to-Refresh on Selective Pages](#)

When working with data such as populating text fields or following a custom, multi-step workflow, the pull-to-refresh functionality can make it easy to accidentally lose data. But now you can choose to disable pull-to-refresh on individual pages, reducing the potential for accidental data loss.

## Prepare for New Alert, Confirm, and Prompt Modules and Components

Chrome and Safari plan to end support for cross-origin use of the `window.alert()`, `window.confirm()`, and `window.prompt()` native APIs. As a solution, there are new modules and components that function like their API counterparts.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in all editions except Database.com.

**When:** These features are available starting the week of June 13, 2022.

**Why:** The new dialogs on mobile don't block the app, they only block the page in which they're presented. With the new components and modules, the user can navigate to a different section of the Salesforce mobile app while an alert, prompt, or confirm dialog is presented. The previous dialogs on mobile are blocking dialogs, which require a user to interact with the prompt or dismiss it to continue using any other part of the app.

For more information about the end of support from Chrome and Safari, see [Preparing Your Components for the Removal of `alert\(\)`/`confirm\(\)`/`prompt\(\)`](#).

**How:** See [Create Notifications with New Alert, Confirm, and Prompt Modules](#) on page 205 for examples using `LightningAlert`, `LightningConfirm`, and `LightningPrompt` in Lightning web components.

See [New and Changed Aura Components](#) on page 243 for examples using Aura syntax with the `lightning:alert`, `lightning:confirm`, and `lightning:prompt` components.

## Disable Pull-to-Refresh on Selective Pages

When working with data such as populating text fields or following a custom, multi-step workflow, the pull-to-refresh functionality can make it easy to accidentally lose data. But now you can choose to disable pull-to-refresh on individual pages, reducing the potential for accidental data loss.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in all editions except Database.com.

**When:** This feature is available starting the week of June 13, 2022.

**How:** Disabling pull-to-refresh is available by firing an event in JavaScript. See ["Disable Pull-to-Refresh in Mobile Components"](#) for the specifics for use in Lightning web components and Aura components.

## Pardot

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You can now apply completion actions to subsets of prospects with conditional logic. You also get sharable campaigns in Lightning, email bounce reports, and improvements to enhanced landing pages. Plus, get real-time prospect updates in Slack with the new Account Engagement app for Slack.

### IN THIS SECTION:

#### [Marketer Experience](#)

Apply conditional completion actions using criteria to filter prospects. The Slack integration is now generally available, so your team can use completion actions to send prospect activity notifications on your marketing assets.

### Data and Content

Enjoy improvements to the enhanced landing page experience, including in-builder form styling. Plus, improved mailability insights on your list email reports and a new aggregate email bounce report.

### Manage and Extend Pardot

New and updated fields for Version 5 of the Pardot API. Plus, a new endpoint for Global Privacy Control in the Tracking and Consent API.

## Marketer Experience

Apply conditional completion actions using criteria to filter prospects. The Slack integration is now generally available, so your team can use completion actions to send prospect activity notifications on your marketing assets.

### IN THIS SECTION:

#### [Automate Better with Completion Action Enhancements](#)

You can now apply completion actions to a subset of prospects who meet conditions you specify. For example, assign prospects who live in Atlanta to User A and prospects who live in Miami to User B when they fill out your form. Conditional completion actions are grouped based on prospect condition, and you can combine both standard and conditional actions on a single asset.

#### [Send Slack Notifications with Completion Actions \(Generally Available\)](#)

Speed up your pipeline and get real-time prospect activity updates in your Slack workspace. Now marketing users can add a completion action that notifies a channel in Slack when prospects interact with marketing assets. Automatically send promising new leads to your sales team, or keep your marketing team updated on important prospect activity. To make the completion action available, install the Marketing Cloud Account Engagement app for Slack in your workspace, then set up the Slack connector in Pardot Settings.

#### [Share Individual Campaigns with Colleagues in Lightning](#)

Now you can manually share an individual campaign record with another Salesforce user. This Classic feature is now available in Lightning Experience. A campaign owner can set sharing settings and view the sharing hierarchy from the action menu on a campaign record.

#### [Control Your Canvas for Email Templates and Email Content](#)

You can now widen or narrow the size of the builder canvas for email content and email templates.

#### [Pardot Drip Programs Are Being Retired](#)

Pardot's legacy Drip Programs feature is being retired in June 2022. If you have active Drip Programs, convert them to Engagement Studio programs.

#### [Form Security Features Now Mandatory](#)

A security update that better protects your forms and marketing content can affect forms served over the default go.pardot.com domain. For continuous form support, we recommend that you use a custom domain with forms or use them with Pardot landing pages. To find out where affected forms are being used, refer to the Content Served Using the Default Domain report in Pardot Settings.

## Automate Better with Completion Action Enhancements

You can now apply completion actions to a subset of prospects who meet conditions you specify. For example, assign prospects who live in Atlanta to User A and prospects who live in Miami to User B when they fill out your form. Conditional completion actions are grouped based on prospect condition, and you can combine both standard and conditional actions on a single asset.

**Where:** This change applies to all Pardot editions.

**When:** Completion action enhancements are available later in the Summer '22 release.

**How:** On the completion action interface for the asset you're working with, add a conditional group and specify the prospect condition you want. Then, add at least one conditional action to the group.

The screenshot shows a configuration interface for a completion action. It includes three dropdown menus at the top: 'Take Action When' (set to 'Prospect Default Field'), 'Prospect Field Type' (set to 'State'), and 'Operator' (set to 'is'). Below these is a 'Value' field containing 'Washington'. Underneath the value field are two more dropdowns: 'Action' (set to 'Assign to queue') and 'Queue' (set to 'Washington Sales'). At the bottom left is a button labeled '+ Add Action to Group', and at the bottom right is a button labeled 'Delete Group'.

Conditional actions only execute on prospects that meet the criteria for the conditional group they're in. Use a combination of standard completion actions and conditional completion actions to achieve your automation goals.

SEE ALSO:

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

## Send Slack Notifications with Completion Actions (Generally Available)

Speed up your pipeline and get real-time prospect activity updates in your Slack workspace. Now marketing users can add a completion action that notifies a channel in Slack when prospects interact with marketing assets. Automatically send promising new leads to your sales team, or keep your marketing team updated on important prospect activity. To make the completion action available, install the Marketing Cloud Account Engagement app for Slack in your workspace, then set up the Slack connector in Pardot Settings.

**Where:** Available for use in all Pardot editions, where approved by a workspace admin and installed in Slack.

**How:** First, ask your Slack workspace admin to install the Marketing Cloud Account Engagement app from the Slack App Directory. Then, set up the Slack connector in Pardot by adding your Slack workspace and selecting channels. After the connector is set up, the Slack notification completion action appears as an option on Pardot assets.

If you previously participated in the beta, ask your Slack workspace admin to install the new Marketing Cloud Account Engagement app for Slack. Next, follow the instructions on the Slack connector in Pardot to upgrade and connect it to the new Account Engagement app. After you upgrade, it's safe to remove the custom app you used for the beta from your workspace. Don't worry, completion actions added during the beta continue to function and aren't affected when you upgrade.

SEE ALSO:

[Salesforce Help: Streamline Tasks with Marketing Cloud Account Engagement for Slack \(can be outdated or unavailable during release preview\)](#)

## Share Individual Campaigns with Colleagues in Lightning

Now you can manually share an individual campaign record with another Salesforce user. This Classic feature is now available in Lightning Experience. A campaign owner can set sharing settings and view the sharing hierarchy from the action menu on a campaign record.

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

SEE ALSO:

[Share Individual Campaigns with Colleagues in Lightning](#)

[Share Campaigns](#)

## Control Your Canvas for Email Templates and Email Content

You can now widen or narrow the size of the builder canvas for email content and email templates.

**Where:** This change applies to all Pardot editions.

SEE ALSO:

[Control Your Workspace in Email Template Builder and Email Content Builder](#)

## Pardot Drip Programs Are Being Retired

Pardot's legacy Drip Programs feature is being retired in June 2022. If you have active 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 \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Nurture Leads with Pardot Engagement Studio \(can be outdated or unavailable during release preview\)](#)

## Form Security Features Now Mandatory

A security update that better protects your forms and marketing content can affect forms served over the default go.pardot.com domain. For continuous form support, we recommend that you use a custom domain with forms or use them with Pardot landing pages. To find out where affected forms are being used, refer to the Content Served Using the Default Domain report in Pardot Settings.

**Where:** This change applies to all Pardot editions.

**When:** The security update is mandatory after August 12, 2022, and can no longer be turned off.

SEE ALSO:

[Knowledge Article: New Limitations on Pardot Content and Default Domain](#)

[Knowledge Article: Pardot Default Domain Changes: Details and FAQs](#)

## Data and Content

Enjoy improvements to the enhanced landing page experience, including in-builder form styling. Plus, improved mailability insights on your list email reports and a new aggregate email bounce report.

**IN THIS SECTION:**[Review Email Bounce Data in One Report](#)

Open the new Email Bounce report to review all of the bounced email addresses across all your email sends from the past year. Instead of looking at bounced email addresses via individual list email reports, you can see all bounced addresses in one place. The Email Bounce report contains bounced email addresses from Pardot Classic emails, enhanced emails, automated sends, and inbox integrations.

[Improvements to Enhanced Landing Page Experience](#)

The enhanced landing page experience now includes support for iframes in HTML components and several small improvements to the UI. Changes were made on the Landing Page tab, landing page records, and in the builder.

[Get Improved Mailability Insights on List Email Reports](#)

To give you a more accurate picture of who's receiving your Pardot emails, list email reports include four new fields. Now you can see total prospects on recipient lists, total suppressed prospects, total unmailable prospects, and total duplicate prospects on the list email report. Use this information to help you make decisions about your email marketing and prospect management.

## Review Email Bounce Data in One Report

Open the new Email Bounce report to review all of the bounced email addresses across all your email sends from the past year. Instead of looking at bounced email addresses via individual list email reports, you can see all bounced addresses in one place. The Email Bounce report contains bounced email addresses from Pardot Classic emails, enhanced emails, automated sends, and inbox integrations.

**Where:** This change is available in all Pardot editions.

**How:** Navigate to **Pardot Reports**. Expand **Emails**, and select **Email Bounce Report**. Filter the report by soft or hard bounce, or click a column name to sort.

**SEE ALSO:**

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

## Improvements to Enhanced Landing Page Experience

The enhanced landing page experience now includes support for iframes in HTML components and several small improvements to the UI. Changes were made on the Landing Page tab, landing page records, and in the builder.

**Where:** These changes apply to all Pardot editions

**Why:** Minor changes improve your experience when using enhanced landing pages.

**Iframe support**

You can add iframes to the HTML component. A placeholder appears in the canvas that includes the source URL of your iframed content.

**Content is rendered on the landing page after you publish**

Changes to image support You can now add a background image inside a row. The image component now supports height and fit options.

**More flexibility on table rows**

Column spacing is available in the row component.

**Enhancements to Input attributes**

Background color, border, and border color styles in the Input section now apply to checkboxes and radio buttons.

**Infobubbles on the Pardot Form component pane**

New infobubbles describe form styling options.

**Enhanced tag support in Code fields**

Header and footer code blocks now support <noscript> and comment (<!-- />) tags.

**New toast message when copying Code fields**

A toast message now appears to confirm that Code block content was copied.

**Support for longer landing page names**

The landing page name field now supports 255 characters.

**Changes to Public Link and Unpublish Redirect URL fields**

The URLs you enter are now clickable, and error messaging was improved.

**New actions on Landing Page home tab and related list**

Row-level actions on the Landing Page tab and the Landing Pages related list on campaigns now include delete, publish, and unpublish.

SEE ALSO:

[Salesforce Help: Considerations for the Enhanced Landing Page Experience](#)(can be outdated or unavailable during release preview)

[Salesforce Help: Use Custom Code with Enhanced Landing Pages](#) (can be outdated or unavailable during release preview)

## Get Improved Mailability Insights on List Email Reports

To give you a more accurate picture of who's receiving your Pardot emails, list email reports include four new fields. Now you can see total prospects on recipient lists, total suppressed prospects, total unmailable prospects, and total duplicate prospects on the list email report. Use this information to help you make decisions about your email marketing and prospect management.

**Where:** This change applies to all Pardot editions.

SEE ALSO:

[Salesforce Help: List Email Report Metrics](#)(can be outdated or unavailable during release preview)

## Manage and Extend Pardot

New and updated fields for Version 5 of the Pardot API. Plus, a new endpoint for Global Privacy Control in the Tracking and Consent API.

IN THIS SECTION:

[Pardot API: New and Changed Items](#)

Access more of your data with new and updated objects for version 5 of the Pardot API.

[Pardot Classic App Is Being Retired](#)

The Pardot Classic App is scheduled for retirement in all Salesforce orgs by October 17, 2022.

### Pardot API: New and Changed Items

Access more of your data with new and updated objects for version 5 of the Pardot API.

**Where:** These changes apply to all Pardot editions with API access.

## New Objects in Version 5

### Prospect & List Import

Supports large scale import of prospects and segments.

## Updated Objects in Versions 3 and 4

### Prospect

Added read-only field `doNotSell`.

### Visitor

Added read-only field `doNotSell`.

## Pardot Classic App Is Being Retired

The Pardot Classic App is scheduled for retirement in all Salesforce orgs by October 17, 2022.

**Where:** This change applies to all Pardot editions.

## Quip

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Get the most out of your Salesforce data with Quip. Use multi-factor authentication to protect your Quip data. Simplify Quip user account and API key management with new Quip API methods. Get faster performance with enhanced, more lightweight Quip API methods. Use new fields in Quip objects to gather more accurate Quip user engagement metrics.

### IN THIS SECTION:

#### [When to Expect Quip Features](#)

New Quip features are coming soon.

#### [Multi-Factor Authentication Enforcement for Quip Happens in May](#)

Effective 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 is enforcing MFA for direct logins to Quip on May 1, 2022.

#### [Simplify Quip User Account Management with the Quip SCIM API](#)

Delete all members of a group folder at the same time with the new `Delete Group` API method. Deleting a group removes the members' access to their corresponding group folder. You can use the `Delete Group` API method to fulfill your compliance and user-management service-level agreements (SLAs).

#### [Simplify API Key Management with the Quip Admin API](#)

Speed up the process of creating, getting, and revoking API keys with three new Admin API methods. Previously, you managed API keys only by using the Quip Admin Console.

#### [Get Better Performance with the Quip Admin API](#)

Work faster with more lightweight, scalable versions of API methods. Export a Quip thread to HTML.

#### [Get Better Quip API Performance with New Folder Limits](#)

Maximum limits now apply to Quip folders so you get better performance when calling Quip Automation API methods to add items and members to folders.

[Gather More Quip User Engagement Metrics](#)

For improved accuracy, new `LastUpdatedDate` and `MetricDate` fields in Quip objects show data in Coordinated Universal Time (UTC). Previously, engagement metrics sometimes were inaccurate due to multiple time zones. The new fields are available in API version 55.0 and later.

## 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 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 multi-factor authentication enforcement	May 2022
Simplify Quip user account management with the Quip SCIM API	May 2022
Simplify API key management with the Quip Admin API	Available now
Get better performance with the Quip Admin API	August 2022
Get better Quip API Performance with new folder limits	May 2022
Gather more Quip user engagement metrics	June 2022

## Multi-Factor Authentication Enforcement for Quip Happens in May

Effective 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 is enforcing MFA for direct logins to Quip on May 1, 2022.

**Where:** This change applies to customers who have an existing Quip for Customer 360 plan, Quip Starter, Quip Plus, or Quip Advanced.

**When:** On May 1, 2022, we're enforcing MFA for all direct logins to Quip sites. At this time, all users must use MFA and are prompted to register for MFA if they haven't. If you previously disabled MFA, we'll turn it back on. In addition, we're removing 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 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:

[Knowledge Article: Enable Multi Factor Authentication \(MFA\) for Quip](#)

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

[Knowledge Article: Multi-Factor Authentication Enforcement Roadmap](#)



## Simplify Quip User Account Management with the Quip SCIM API

Delete all members of a group folder at the same time with the new `Delete Group` API method. Deleting a group removes the members' access to their corresponding group folder. You can use the `Delete Group` API method to fulfill your compliance and user-management service-level agreements (SLAs).

**Where:** This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce with an existing Quip for Customer 360 plan, Quip Plus, or Quip Advanced. This API method is available in version 1.1 and version 2 of the System for Cross-domain Identity Management SCIM API.

SEE ALSO:

[SCIM API Documentation \(can be outdated or unavailable before May 2022\)](#)

[Knowledge Article: Folders](#)

## Simplify API Key Management with the Quip Admin API

Speed up the process of creating, getting, and revoking API keys with three new Admin API methods. Previously, you managed API keys only by using the Quip Admin Console.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce with an existing Quip for Customer 360 plan, Quip Plus, or Quip Advanced.

**How:** Automate API key management with these new API methods.

- **Add API Key**—Create an API key that you can use to generate an OAuth token.
- **Get API Key**—Retrieve an API key's `client_id` and `client_secret`.
- **Revoke API Key**—Revoke an API key associated with an integration that you're no longer using, and help protect your Quip data.

SEE ALSO:

[Quip Admin API Documentation](#)

[Quip Admin API Documentation: Authentication](#)

## Get Better Performance with the Quip Admin API

Work faster with more lightweight, scalable versions of API methods. Export a Quip thread to HTML.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer Editions. Available in Salesforce with an existing Quip for Customer 360 plan, Quip Plus, or Quip Advanced.

**Why:** Gain more functionality with these new and improved Quip Admin API methods.

- `Get Information about a User` is now split into two separate methods that support eDiscovery and eArchiving.
  - **Get Information about a User V2**—Get information about a specified user.
  - **Get User's Threads V2**—Retrieve information about Quip threads owned by a specified user.
- `Get a 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 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 Thread Retention Policies V2**—Get a thread’s retention information to support data governance related to how long you keep your Quip data.
- **Get Thread Legal Hold Policies V2**—Get a thread’s legal hold information to support data governance related to your Quip data that’s stored indefinitely.
- `Get Threads by ID`
  - **Get Threads V2**—Get basic information about multiple Quip documents, spreadsheets, or chats.
- `Create Export HTML Request`
  - Request the HTML for a Quip document or spreadsheet to create automations.
- `Retrieve Export HTML Response`
  - Get your requested HTML of a Quip document or spreadsheet after you call the `Create Export HTML Request` API method.

## SEE ALSO:

[Quip Admin API Documentation](#) (can be outdated or unavailable before August 2022)

[Knowledge Article: Governance](#)

[Quip Admin API Documentation: REST API Versioning FAQ](#)

## Get Better Quip API Performance with New Folder Limits

Maximum limits now apply to Quip folders so you get better performance when calling Quip Automation API methods to add items and members to folders.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce with an existing Quip for Customer 360 plan, Quip Plus, or Quip Advanced.

**How:** For faster performance, we’ve introduced these new limits.

You can add 4,000 items maximum to a folder, including documents, spreadsheets, and subfolders, but we recommend that you add no more than 1,000. The limits apply to these Automation API methods.

API Methods	Inputs
Add People to a Thread or Add a Thread to Folders	member_ids
Add Thread to Folders V2	folder_id
Copy a Document or Template V2	folder_id
Copy a Document or Template V1	folder_ids
Create a Folder	parent_id
Import a File	member_ids

When you call the Add People to a Folder API method and add more than 500 members to a standard folder, Quip converts that folder to a workspace folder. Members of a workspace folder then see updates only for the items that they participate in.

SEE ALSO:

[Quip Automation API Documentation](#)

[Salesforce Help: Folder Limits](#)

## Gather More Quip User Engagement Metrics

For improved accuracy, new `LastUpdatedDate` and `MetricDate` fields in Quip objects show data in Coordinated Universal Time (UTC). Previously, engagement metrics sometimes were inaccurate due to multiple time zones. The new fields are available in API version 55.0 and later.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, Performance, Unlimited, and Developer editions. Available in Salesforce with an existing Quip for Customer 360 plan, Quip Plus, or Quip Advanced.

Object	Field	Description
CollabDocumentMetric	LastUpdatedDateOnly	The date that the document was created, last edited, or last shared in UTC.
CollabTemplateMetric	LastUpdatedDateOnly	The date that the template was created, last edited, or last shared in UTC.
CollabDocumentMetric	MetricDateOnly	The date that the metric was gathered in UTC.
CollabDocumentMetricRecord		
CollabTemplateMetric		
CollabTemplateMetricRecord		
CollabUserEngagementMetric		

SEE ALSO:

[SOAP API Developer Guide \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: What Time Zone Is Used For Quip Metric Reporting?](#)

## Revenue

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Use Subscription Management to sell subscriptions and drive more revenue. Enable a release update in Salesforce CPQ, and use Salesforce CPQ Plus to track asset lifecycles. Review a change in Salesforce Billing.

## IN THIS SECTION:

[Subscription Management \(Generally Available\)](#)

Use Subscription Management to automate processes for selling, invoicing, and collecting payments for subscription products and one-time sales. Create product catalogs, manage pricing, manage subscriptions, invoice customers, evaluate the risk of late payments, collect payments, and track customer purchases. The Subscription Management API powers your subscription lifecycle regardless of the selling channel.

[Salesforce CPQ and Billing](#)

Enable a release update that improves browser performance in Salesforce CPQ, and track what your customers have bought by using Customer Asset Lifecycle Management with Salesforce CPQ Plus. Review a change to consumption rate upper bounds in Salesforce Billing.

## Subscription Management (Generally Available)

Use Subscription Management to automate processes for selling, invoicing, and collecting payments for subscription products and one-time sales. Create product catalogs, manage pricing, manage subscriptions, invoice customers, evaluate the risk of late payments, collect payments, and track customer purchases. The Subscription Management API powers your subscription lifecycle regardless of the selling channel.

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

**Who:** This feature is available with a Subscription Management license to users with a Salesforce user license.

## IN THIS SECTION:

[Use Subscription Management to Manage Subscription Sales \(Generally Available\)](#)

Use Subscription Management to create and categorize product catalogs, manage pricing, generate invoices, process payments, issue credit memos, and track customer purchases over time. Use a Buy Now flow template to automate order processes while you control your customer channels. Use Einstein Collections (beta) to evaluate the risk of late payment.

[Power Your Subscription Business with the Subscription Management API \(Generally Available\)](#)

Subscription Management provides a REST API and standard Salesforce objects to support the subscription lifecycle. Use the Subscription Management API to integrate Salesforce data with the front end of your choice. The API supports common use cases for managing recurring subscription sales, such as calculating prices and price adjustments, implementing a Buy Now experience, renewing and canceling a subscription, and handling invoicing and payments.

[Score Invoices for Late-Payment Risk Using Einstein Collections \(Beta\)](#)

Improve your collections process when you use Subscription Management. Einstein Collections evaluates invoice and account information to score invoices for the likelihood of late payment. Your payment and collections team can use the scores to prioritize invoices with higher risk.

[Considerations for Subscription Management](#)

Review considerations for implementing and using Subscription Management.

## SEE ALSO:

[Salesforce Help: Licensing and Total Order Amount in Subscription Management \(can be outdated or unavailable during release preview\)](#)

## Use Subscription Management to Manage Subscription Sales (Generally Available)

Use Subscription Management to create and categorize product catalogs, manage pricing, generate invoices, process payments, issue credit memos, and track customer purchases over time. Use a Buy Now flow template to automate order processes while you control your customer channels. Use Einstein Collections (beta) to evaluate the risk of late payment.

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

**Who:** This feature is available with a Subscription Management license to users with a Salesforce user license.

### Sell Products

Manage fixed-term and evergreen subscriptions as well as one-time sales. Easily import categorized product catalogs along with information on how to price, sell, and discount products.

### Price Products

Calculate prices and price adjustments. Optimize pricing for maximum sales using volume or discretionary discounts.

### Use Buy Now to Sell on Your Preferred Channels

Make it easy for customers to place an order from your website or other channels of your choice. Subscription Management includes a Buy Now flow template that retrieves current products and prices, generates an order, an asset, and an invoice for a subscription, and applies the initial payment.

### Automate Tax, Billing, and Payments

Use Subscription Management to calculate tax, generate recurring and one-time invoices, process and apply payments, and issue credit memos.

### Cancel, Renew, and Track Subscriptions

Subscription Management doesn't stop when your customers make an initial purchase. See what products each customer has bought using the Asset Lifecycle Management feature, and manage cancellations and renewals for customers' subscriptions.

### Score Invoices for Late-Payment Risk Using Einstein Collections (Beta)

Score invoices based on the likelihood of late payment so that you can prioritize risky invoices.

#### SEE ALSO:

[Salesforce Help: Set Up Subscription Management \(can be outdated or unavailable during release preview\)](#)

[Power Your Subscription Business with the Subscription Management API \(Generally Available\)](#)

## Power Your Subscription Business with the Subscription Management API (Generally Available)

Subscription Management provides a REST API and standard Salesforce objects to support the subscription lifecycle. Use the Subscription Management API to integrate Salesforce data with the front end of your choice. The API supports common use cases for managing recurring subscription sales, such as calculating prices and price adjustments, implementing a Buy Now experience, renewing and canceling a subscription, and handling invoicing and payments.

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

**Who:** This feature is available with a Subscription Management license to users with a Salesforce user license.

#### SEE ALSO:

[Use Subscription Management to Manage Subscription Sales \(Generally Available\)](#)

[Salesforce Developer Documentation: Subscription Management API \(can be outdated or unavailable during release preview\)](#)

## Score Invoices for Late-Payment Risk Using Einstein Collections (Beta)

Improve your collections process when you use Subscription Management. Einstein Collections evaluates invoice and account information to score invoices for the likelihood of late payment. Your payment and collections team can use the scores to prioritize invoices with higher risk.



**Note:** Einstein Collections is a beta service. Try this feature at your sole discretion. Use of the service is subject to the applicable Beta Services Terms at [Agreements and Terms](#).

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

**Who:** This feature is available with a Subscription Management license to users with a Salesforce user license.

## Considerations for Subscription Management

Review considerations for implementing and using Subscription Management.

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

**Who:** This feature is available with a Subscription Management license to users with a Salesforce user license.

### Negative Credit Memos

Subscription Management doesn't support negative credit memos.

### Orders

Subscription Management doesn't support change orders, reduction orders, or orders without price books.

## Salesforce CPQ and Billing

Enable a release update that improves browser performance in Salesforce CPQ, and track what your customers have bought by using Customer Asset Lifecycle Management with Salesforce CPQ Plus. Review a change to consumption rate upper bounds in Salesforce Billing.

### IN THIS SECTION:

#### [Salesforce CPQ](#)

Enable a release update that improves browser performance in Salesforce CPQ, and track what your customers have bought by using Customer Asset Lifecycle Management with Salesforce CPQ Plus. Use the external configurator when enhanced domains are enabled.

#### [Salesforce Billing Consumption Rate Upper Bounds Were Changed](#)

During usage quantity evaluation, a consumption rate upper bound rates up to but not including its value. For example, previously, an upper bound of 11 caused the rate to apply to usage quantities up to and including 10. Now the rate applies to usage quantities up to but not including 11.

## Salesforce CPQ

Enable a release update that improves browser performance in Salesforce CPQ, and track what your customers have bought by using Customer Asset Lifecycle Management with Salesforce CPQ Plus. Use the external configurator when enhanced domains are enabled.

**IN THIS SECTION:**[Experience Browser Performance Improvements for Salesforce CPQ \(Release Update\)](#)

With this update, Salesforce CPQ runs faster in supported web browsers by employing Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Summer '22.

[Get Customer Asset Lifecycle Management with Salesforce CPQ Plus](#)

With a Salesforce CPQ Plus license, you now have visibility into products your customers have bought, from initial sale through the end date of a subscription or service. Previously, Customer Asset Lifecycle Management was available only with Salesforce Billing.

[Salesforce CPQ External Configurator Is Compatible with Enhanced Domains](#)

You can now use the Salesforce CPQ External Configurator when enhanced domains are enabled by updating the Salesforce CPQ package settings.

## Experience Browser Performance Improvements for Salesforce CPQ (Release Update)

With this update, Salesforce CPQ runs faster in supported web browsers by employing Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Summer '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 now 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 and you want to disable the update, contact Salesforce CPQ Support.

## Get Customer Asset Lifecycle Management with Salesforce CPQ Plus

With a Salesforce CPQ Plus license, you now have visibility into products your customers have bought, from initial sale through the end date of a subscription or service. Previously, Customer Asset Lifecycle Management was available only with Salesforce Billing.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ Plus.

## Salesforce CPQ External Configurator Is Compatible with Enhanced Domains

You can now use the Salesforce CPQ External Configurator when enhanced domains are enabled by updating the Salesforce CPQ package settings.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ Plus.

**How:** Update the Salesforce CPQ package settings to add the enhanced domains format of the external configurator URL.

1. In Setup, find and open **Visualforce Pages**.
2. Next to the external configurator's Visualforce page, open the page by clicking **Preview**.
3. Copy the URL. The URL is the external configurator URL in enhanced domains format.
4. In Setup, find and open **Installed Packages**.
5. Next to the Salesforce CPQ package, click **Configure**, and then click **Additional Settings**.
6. In the External Configurator URL field, paste the URL and click **Save**.

SEE ALSO:

[Enhanced Domains](#)

## Salesforce Billing Consumption Rate Upper Bounds Were Changed

During usage quantity evaluation, a consumption rate upper bound rates up to but not including its value. For example, previously, an upper bound of 11 caused the rate to apply to usage quantities up to and including 10. Now the rate applies to usage quantities up to but not including 11.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Salesforce Billing. Salesforce Billing requires Salesforce CPQ. Some subscriptions offer this package for an extra cost.

## Sales

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Use new Sales Enablement features to improve your company's training and enablement experience. Unlimited and Performance Edition orgs can access several Sales Cloud features without purchasing add-on licenses. You can enable person accounts without reaching out to Salesforce Support. We're also rolling out lots of new features for Collaborative Forecasts, Salesforce Maps, Einstein Conversation Insights, and other Sales Cloud features.

### IN THIS SECTION:

#### [Core Sales Features](#)

Salesforce admins can enable Person Accounts without reaching out to Salesforce Support. Collaborative Forecasts users can customize and filter their forecasts, and run forecasts from their mobile devices.

#### [Sales Enablement \(myTrailhead\)](#)

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

#### [Revenue Intelligence](#)

Collaborative Forecasting is no longer required to use Revenue Insights.

#### [Pipeline Inspection](#)

Get broader insight into deal health with insights from activities, service cases, and opportunity scores. Choose single or multiple forecast category rollups for Pipeline Inspection. Rename your forecast category metrics to show in the Pipeline Inspection view. The Pipeline Inspection permission set name changed.

#### [Productivity Features](#)

Einstein Activity Capture users can override automatic associations and use a new email insight. Sales reps can also create calendar events directly from availability view and take advantage of several new email features.



### Salesforce Maps

Access the Salesforce Maps portfolio of products in the same languages as Salesforce. Discover data that's available in the countries where you do business. Navigate a new home screen for approvals, alignments, and datasets in Territory Planning. And import data using more options for queries and CSV files.

### 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

Salesforce orgs using Unlimited Edition or above can access Einstein Conversation Insights features without purchasing add-on licenses. ECI now shows follow up items for voice and video calls automatically. Questions insights help sales reps and managers easily identify open-ended questions. And we're rolling out several usability improvements, including transcript searches and commenting on video call segments.

### High Velocity Sales

Add sales cadence fields to task reports and take advantage of new email send limits. The High Velocity Sales app will soon change its name to Sales Engagement, and is now included by default in Unlimited and Performance editions. The HVS permission set names are also changed in Unlimited and Performance editions.

### Sales Cloud Einstein

Estimate the value your business will see from Einstein Lead Scoring with the updated Readiness Assessor.

### Sales Cloud for Slack (Beta)

Have your sales teams started collaborating using Sales Cloud for Slack yet? Sales Cloud for Slack becomes available as a Beta Service in Spring '22. Learn how to get started with the app today.

### Gmail Integration

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics.

### Integration with Microsoft®

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics. To continue support for active users, full product retirement for Salesforce for Outlook is rescheduled for June 2024.

### Other Changes in the Sales Cloud

Unlimited and Performance Edition orgs can access several Sales Cloud features without purchasing add-on licenses.

## Core Sales Features

Salesforce admins can enable Person Accounts without reaching out to Salesforce Support. Collaborative Forecasts users can customize and filter their forecasts, and run forecasts from their mobile devices.

### IN THIS SECTION:

#### Accounts

You can enable Person Accounts without reaching out to Salesforce Support. Make sure to test and review the implications of enabling the feature. Person accounts can't be disabled after they're enabled.

### Collaborative Forecasts

Customize and filter forecasts to focus only on the data that's critical to your business. Run more forecasts on the go from your mobile device. And if you use multiple currencies, see amounts in your forecast and corporate currencies when you edit currency values.

### Other Changes in Core Sales Features

Campaign owners can share individual campaign records with other Salesforce users in Lightning Experience. To accommodate for future expansion of Enterprise Territory Management functions, API versions 55.0 and later require that territory assignments include data types.

## Accounts

You can enable Person Accounts without reaching out to Salesforce Support. Make sure to test and review the implications of enabling the feature. Person accounts can't be disabled after they're enabled.

### IN THIS SECTION:

#### [Enable Person Accounts Without Contacting Salesforce Support](#)

You can now enable Person Accounts without reaching out to Salesforce Support. Person accounts store information by combining certain account and contact fields into one record. This allows you to store information about a person in a record that can act like an account when necessary.


## Enable Person Accounts Without Contacting Salesforce Support

You can now enable Person Accounts without reaching out to Salesforce Support. Person accounts store information by combining certain account and contact fields into one record. This allows you to store information about a person in a record that can act like an account when necessary.

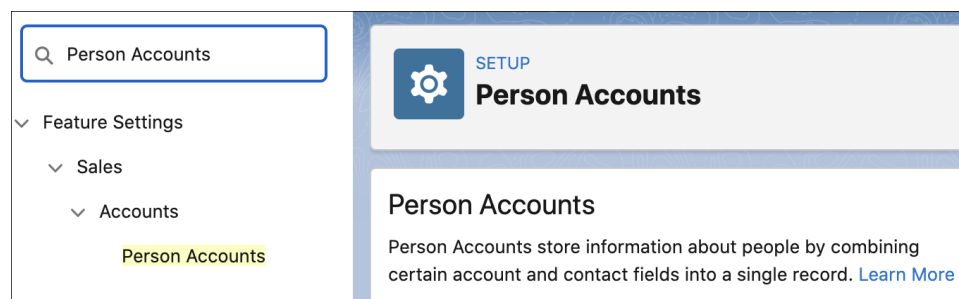
**Where:** Person accounts is available in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** You can enable person accounts after you meet these prerequisites.

- The account object has at least one record type.
- User profiles that have read permission on accounts have read permission on contacts.
- The organization-wide default sharing is set so that either Contact is **Controlled by Parent** or both Account and Contact are **Private**.

 **Note:** Person accounts can't be disabled after they're enabled. Make sure you test the features in a sandbox to preview how the changes affect Salesforce and review the implications of enabling the feature.

To enable person accounts in Setup, enter *Person Accounts* in the Quick Find box, and then select **Person Accounts**.



## SEE ALSO:

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

## Collaborative Forecasts

Customize and filter forecasts to focus only on the data that's critical to your business. Run more forecasts on the go from your mobile device. And if you use multiple currencies, see amounts in your forecast and corporate currencies when you edit currency values.

## IN THIS SECTION:

### [Customize Cumulative Rollup Names](#)

To tailor your forecast grid to your business, change the labels that represent cumulative rollups of forecast categories. For example, show cumulative rollups for Closed Only, Best Case, Commit, Most Likely, and Open Pipeline forecasts to reflect the way your company forecasts. Previously, label changes showed only for single-category rollups. Also, in Forecast Settings, we renamed the buttons to save and cancel your changes to Save and Cancel, respectively.

### [Choose More Opportunity Fields to Include or Exclude from Your Forecasts](#)

With custom filters, your sales team can filter by standard number, currency, and picklist fields for forecasts to pinpoint the data to study. For example, you can filter forecasts by new business to compare to renewal forecasts. Previously, you could filter only by record type. You can't filter on custom data types.

### [View All User Role-Based Forecast Types in the Salesforce Mobile App](#)

You can now see and use forecasting types in the Salesforce mobile app that use opportunity revenue, opportunity products, opportunity splits, overlay splits, and product schedules grouped by user role. Previously, in the Salesforce mobile app, you could only view forecast types that used opportunity revenue measures. Forecasting types grouped by territory hierarchy aren't supported in the Salesforce mobile app.

### [View Corporate and Forecast Currency Units in Collaborative Forecasts](#)

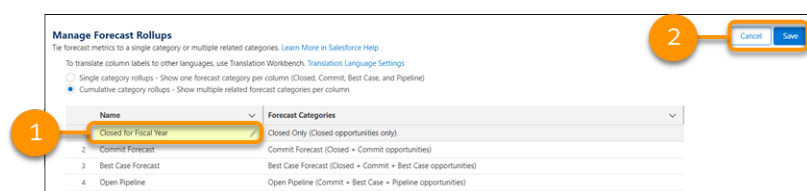
If you use multiple currencies with parenthetical currency conversion enabled, you can see both currencies in the forecasts grid without converting the amounts manually. When you edit a custom currency field directly in the forecasts grid, the value is shown in your forecast's currency followed by the corporate currency in parentheses.

## Customize Cumulative Rollup Names

To tailor your forecast grid to your business, change the labels that represent cumulative rollups of forecast categories. For example, show cumulative rollups for Closed Only, Best Case, Commit, Most Likely, and Open Pipeline forecasts to reflect the way your company forecasts. Previously, label changes showed only for single-category rollups. Also, in Forecast Settings, we renamed the buttons to save and cancel your changes to Save and Cancel, respectively.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** In Forecasts Settings, under Manage Forecast Rollups, click the name that you want to change (1). Edit the forecast category name, and save your changes (2). If you use multiple languages, translate cumulative rollup labels in Translation Workbench.



To change labels for single-category rollups, continue to use the object management settings for opportunities.

Metadata API supports forecast rollup setup.

SEE ALSO:

[Salesforce Help: Customize Forecast Categories in Collaborative Forecasts](#) (can be outdated or unavailable during release preview)

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

[Metadata API Developer Guide: StandardValueSet Names and Standard Picklist Fields](#)(can be outdated or unavailable during release preview)

## Choose More Opportunity Fields to Include or Exclude from Your Forecasts

With custom filters, your sales team can filter by standard number, currency, and picklist fields for forecasts to pinpoint the data to study. For example, you can filter forecasts by new business to compare to renewal forecasts. Previously, you could filter only by record type. You can't filter on custom data types.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** When you create a forecast type in the setup flow, select the standard fields and condition logic to filter by. You can add up to three conditions and use the AND operator only.

Enterprise API, Metadata API, and Tooling API support custom filters.

SEE ALSO:

[Salesforce Help: Forecast Types in Collaborative Forecasts](#) (can be outdated or unavailable during release preview)

[Object Reference for Salesforce and Lightning Platform: ForecastingFilter](#) (can be outdated or unavailable during release preview)

[Object Reference for Salesforce and Lightning Platform: ForecastingFilterCondition](#) (can be outdated or unavailable during release preview)

[Metadata API Developer Guide: ForecastingType](#) (can be outdated or unavailable during release preview)

## View All User Role-Based Forecast Types in the Salesforce Mobile App

You can now see and use forecasting types in the Salesforce mobile app that use opportunity revenue, opportunity products, opportunity splits, overlay splits, and product schedules grouped by user role. Previously, in the Salesforce mobile app, you could only view forecast types that used opportunity revenue measures. Forecasting types grouped by territory hierarchy aren't supported in the Salesforce mobile app.

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

**Why:** For example, you can view your forecast by opportunity splits on mobile devices.

SEE ALSO:

[Salesforce Help: Forecast Types in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

## View Corporate and Forecast Currency Units in Collaborative Forecasts

If you use multiple currencies with parenthetical currency conversion enabled, you can see both currencies in the forecasts grid without converting the amounts manually. When you edit a custom currency field directly in the forecasts grid, the value is shown in your forecast's currency followed by the corporate currency in parentheses.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**Why:** For example, if you use euros as your forecasts currency and US dollars as your corporate currency, the US dollar amount is displayed in parentheses.

Opportunity Name	Account Name	Forecasted Amount
Acme - 600 Widgets	Acme	EUR 80,500.00 (USD 70,000.00)

SEE ALSO:

[Salesforce Help: Select a Forecast Currency in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Using Multiple Currencies in Collaborative Forecasts \(can be outdated or unavailable during release preview\)](#)

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

## Other Changes in Core Sales Features

Campaign owners can share individual campaign records with other Salesforce users in Lightning Experience. To accommodate for future expansion of Enterprise Territory Management functions, API versions 55.0 and later require that territory assignments include data types.

IN THIS SECTION:

[Share Individual Campaigns with Colleagues in Lightning](#)

Now you can manually share an individual campaign record with another Salesforce user. This Classic feature is now available in Lightning Experience. A campaign owner can set sharing settings and view the sharing hierarchy from the action menu on a campaign record.

### [Data Type Requirement for Territory Assignments in API Versions 55.0 and Later](#)

Assign data types when referencing ObjectTerritory2Association for Enterprise Territory Management using API versions 55.0 and later. These versions require that you specify the object for your assignments so that you can accommodate future expansions for assigning territories to more objects.

### [Enable New Order Save Behavior \(Release Update\)](#)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

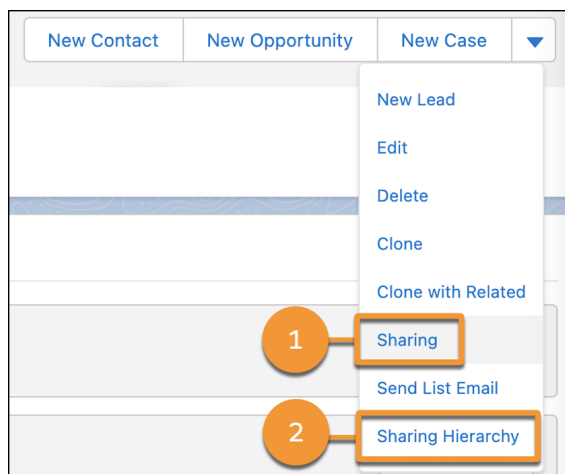
## Share Individual Campaigns with Colleagues in Lightning

Now you can manually share an individual campaign record with another Salesforce user. This Classic feature is now available in Lightning Experience. A campaign owner can set sharing settings and view the sharing hierarchy from the action menu on a campaign record.

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

**Why:** Campaigns and their related records are governed by org-wide sharing settings. Sometimes that relationship hides records from users who actually need access to them. Manual sharing is already available on other Salesforce objects, such as accounts and opportunities.

**How:** To share a campaign with a new user or group, a campaign owner can open the campaign's action menu and choose Sharing (1). To view who already has access to a campaign, select Sharing Hierarchy (2).



When org-wide sharing settings are set to Public Full Access, the sharing options don't appear on individual campaigns because they can't be shared further.

SEE ALSO:

[Share Campaigns](#)

## Data Type Requirement for Territory Assignments in API Versions 55.0 and Later

Assign data types when referencing ObjectTerritory2Association for Enterprise Territory Management using API versions 55.0 and later. These versions require that you specify the object for your assignments so that you can accommodate future expansions for assigning territories to more objects.

**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:** For direct references to `ObjectTerritory2Association`, assign those references to a data type. The bold section assigns the reference to the `Account` object.

```
List<Account> accountList = new List<Account>();

List<ObjectTerritory2Association> listall = [SELECT
    Territory2id,
    TYPEOF Object
    WHEN Account THEN
        Name,
        Owner.Name,
        Ownerid
    END
FROM ObjectTerritory2Association];

for (ObjectTerritory2Association ota : listall) {
    Account acc = ota.Object;
    accountList.add(acc);
}
```

Or cast them to a data type before adding them to method signatures. The bold section assigns the reference to the `Account` object.

```
List<Account> accountList = new List<Account>();

List<ObjectTerritory2Association> listall = [SELECT
    Territory2id,
    TYPEOF Object
    WHEN Account THEN
        Name,
        Owner.Name,
        Ownerid
    END
FROM ObjectTerritory2Association];

for (ObjectTerritory2Association ota : listall) {
    accountList.add((Account) ota.Object);
}
```

## Enable New Order Save Behavior (Release Update)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

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

**When:** This update was first available in Winter '20 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**.

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Custom application logic consists of validation rules, apex triggers and classes, workflow rules, and flows. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

Packages with orders created before Winter '21 don't support the New Order Save Behavior release update by default. If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.

## Sales Enablement (myTrailhead)

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

### IN THIS SECTION:

#### [Align Your Admin Experience with Enablement Site Terminology Changes](#)

All parts of your company's workflow for publishing custom enablement content now align with the announcement that myTrailhead is part of a new solution called Sales Enablement. Previously, some labels in Salesforce, such as items in Setup and the names of specific system permissions, still showed the myTrailhead name. Now, admins see the same terminology in Salesforce that content creators, release managers, and other collaborators see on your company's enablement site.

## Align Your Admin Experience with Enablement Site Terminology Changes

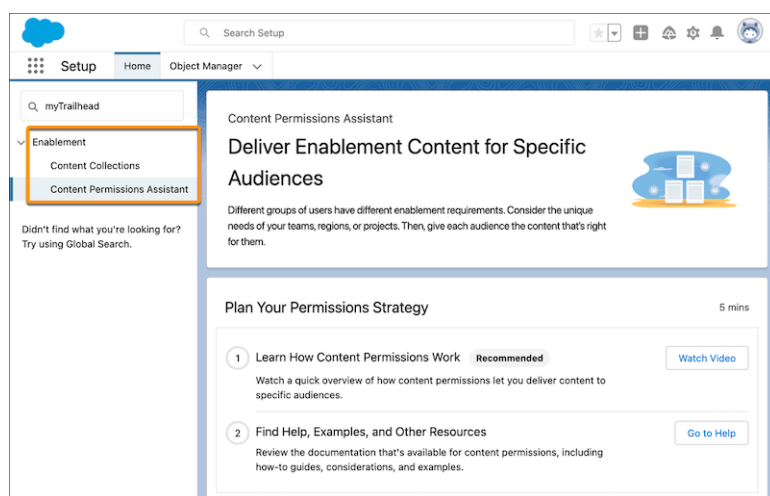
All parts of your company's workflow for publishing custom enablement content now align with the announcement that myTrailhead is part of a new solution called Sales Enablement. Previously, some labels in Salesforce, such as items in Setup and the names of specific system permissions, still showed the myTrailhead name. Now, admins see the same terminology in Salesforce that content creators, release managers, and other collaborators see on your company's enablement site.

**Where:** This change applies to Sales Enablement (myTrailhead), which is available for Enterprise, Performance, and Unlimited editions.

**Who:** This change appears for users with these permissions.

- View Setup and Configuration
- Manage Permission Sets
- myTrailhead Manage Content Collections

**How:** In Setup, the Content Permissions Assistant and Content Collections pages now appear under Enablement. Entering *myTrailhead* in the Quick Find box still returns these pages in the results.



We've also updated the name of the permission set license that you select on a permission set that gives users access to specific enablement site functionality. If you're new to Sales Enablement, or if your license information has been modified recently, the permission



set license name is updated to Sales Enablement. If you already use Sales Enablement and your license information hasn't changed recently, the name still appears as myTrailhead. The name doesn't affect the license.

Enter permission set information

Label

API Name

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here

LicenseSales Enablement

On a permission set, the myTrailhead Content Collections Access settings—where you assign specific content collections that users can access—are renamed Enablement Content Collections Access settings.

Permission Set

Enablement Site Admins

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

Description

API Name

Enablement\_Site\_Admins

License

Sales Enablement

Namespace Prefix

Session Activation Required

Created By

Last Modified By

Apps

Flow Access

Permissions to execute Flows

Enablement Content Collections Access

Permissions to access content collections on your enablement site

Custom Metadata Types

Permissions to access custom metadata types

Custom Setting Definitions

Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management

Learn More

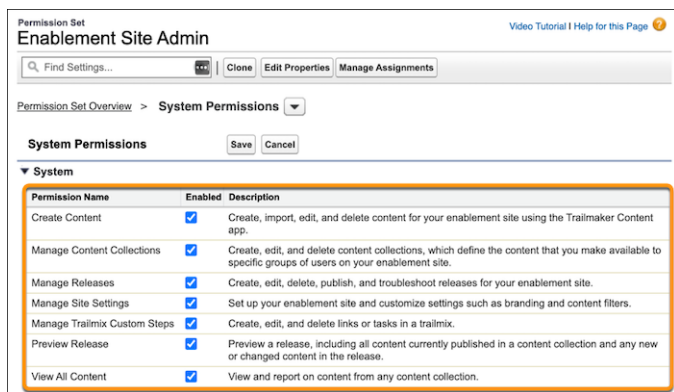
System Permissions

Permissions to perform actions that apply across apps, such as "Modify All Data"

We've also updated the names and descriptions of these system permissions that you can enable on a permission set. We haven't changed any functionality related to these permissions.

Previous	Current
myTrailhead Branding Management	Manage Site Settings
myTrailhead Content Creation	Create Content
myTrailhead Custom Steps	Manage Trailmix Custom Steps
myTrailhead Manage Content Collections	Manage Content Collections
myTrailhead Preview Release	Preview Release

Previous	Current
myTrailhead Release Management	Manage Releases
myTrailhead View All Content	View All Content



These updated terms also appear throughout Salesforce Help.

SEE ALSO:

[Salesforce Help: Terminology Changes from myTrailhead to Sales Enablement \(can be outdated or unavailable during release preview\)](#)

## Revenue Intelligence

Collaborative Forecasting is no longer required to use Revenue Insights.

IN THIS SECTION:

[Get Revenue Insights with or without Collaborative Forecasts Enabled](#)

Previously, Revenue Insights required you to have Collaborative Forecasts enabled. You can now use Revenue Insights even if you don't have Collaborative Forecasts enabled. Instead, you can use Revenue Insights with role hierarchy enabled.

### Get Revenue Insights with or without Collaborative Forecasts Enabled

Previously, Revenue Insights required you to have Collaborative Forecasts enabled. You can now use Revenue Insights even if you don't have Collaborative Forecasts enabled. Instead, you can use Revenue Insights with role hierarchy enabled.

**Where:** This change applies to Revenue Intelligence in the Sales Cloud in Lightning Experience in Enterprise and Unlimited editions.

**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:** 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 CRM Analytics, and turn on Revenue Insights. Assign the Revenue Intelligence permission sets to the users who you want to have access to Revenue Insights

## Pipeline Inspection

Get broader insight into deal health with insights from activities, service cases, and opportunity scores. Choose single or multiple forecast category rollups for Pipeline Inspection. Rename your forecast category metrics to show in the Pipeline Inspection view. The Pipeline Inspection permission set name changed.

### IN THIS SECTION:

#### [Close More Deals with New Insights Sources and Recommended Actions in Einstein Deal Insights](#)

Sales teams get a deeper understanding of deal health in Pipeline Inspection with new insights from service cases, activities, Einstein Opportunity Scoring, and more. Einstein Deal Insights include recommended actions, so reps can quickly take the next step toward closing deals.

#### [Manage Forecasting Rollups for Pipeline Inspection](#)

The Pipeline Inspection view shows metrics such as Best Case and Open Pipeline. You can select whether each of these metrics is tied to a single forecast category or multiple rollup forecast categories.

#### [Rename Forecast Category Metrics for Pipeline Inspection](#)

You can rename the forecast category metrics that display in the Pipeline Inspection view. Rename English labels in the Object Manager or Pipeline Inspection Setup page, and non-English labels in Translation Workbench.

#### [Pipeline Inspection Permissions Have Changed](#)

Pipeline Inspection is now part of the Sales Cloud Included license, and continues to be available at no extra cost in Performance and Unlimited editions. To ensure continued use of Pipeline Inspection, reassign users to the Pipeline Inspection Included permission set. This change is recommended in Summer '22, and could become required in a later release.

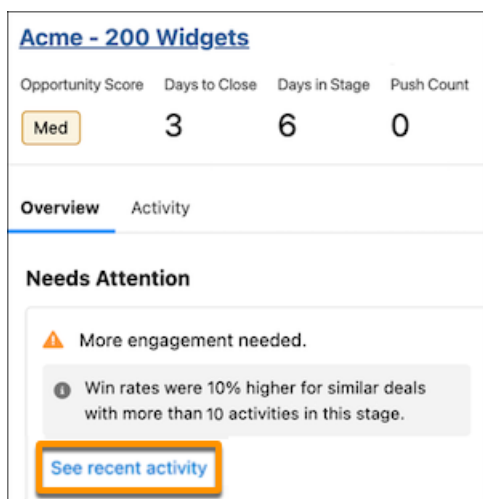
## Close More Deals with New Insights Sources and Recommended Actions in Einstein Deal Insights

Sales teams get a deeper understanding of deal health in Pipeline Inspection with new insights from service cases, activities, Einstein Opportunity Scoring, and more. Einstein Deal Insights include recommended actions, so reps can quickly take the next step toward closing deals.

**Where:** This change applies to Pipeline Inspection, available in Performance and Unlimited Editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise edition.

**When:** Deal Insights based on activity data are available in production later in Summer '22.

**Why:** Here's how deal insights with recommended actions help sales reps close more deals. For example, an insight indicates that the number of activities is low compared to similar deals with higher win rates. This insight includes an action to prompt the sales rep to review their activities on the opportunity.



**How:** To customize the insights that you'd like to show, go to Pipeline Inspection Setup. In the Turn on Deal Insights section, choose the types of insights that you want.

SEE ALSO:

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

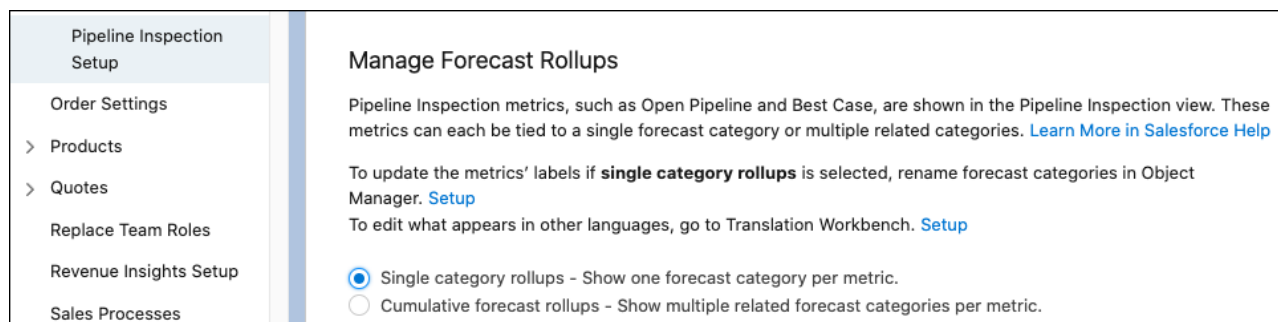
[Salesforce Help: Turn On Pipeline Inspection and Einstein Deal Insights \(can be outdated or unavailable during release preview\)](#)

## Manage Forecasting Rollups for Pipeline Inspection

The Pipeline Inspection view shows metrics such as Best Case and Open Pipeline. You can select whether each of these metrics is tied to a single forecast category or multiple rollup forecast categories.

**Where:** This change applies to Pipeline Inspection, available in Performance and Unlimited editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

**How:** To toggle between single and cumulative forecast rollups, from Setup, in the Quick Find box, enter *Pipeline Inspection Setup*, and then select **Pipeline Inspection Setup**.



The default rollup setting is cumulative forecast rollups. For more information, see “Select a Forecast Rollups Method in Pipeline Inspection” in the Salesforce Help.

SEE ALSO:

[Salesforce Help: Select a Forecast Rollups Method in Pipeline Inspection \(can be outdated or unavailable during release preview\)](#)

## Rename Forecast Category Metrics for Pipeline Inspection

You can rename the forecast category metrics that display in the Pipeline Inspection view. Rename English labels in the Object Manager or Pipeline Inspection Setup page, and non-English labels in Translation Workbench.

**Where:** This change applies to Pipeline Inspection, available in Performance and Unlimited editions. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

**How:** All the links to rename forecast category metrics are accessible from the Pipeline Inspection Setup page. In the Quick Find box in Setup, enter *Pipeline Inspection Setup*, and then select **Pipeline Inspection Setup**.

If **single category rollups** is selected, rename forecast categories in Object Manager. If **cumulative forecast rollups** is selected, rename forecast categories directly on the Setup page.

To edit what appears in other languages for both settings, go to the Pipeline Inspection Metric Configuration page in Translation Workbench.

As of Summer '22, the default label for the **Total Pipeline** metric is now **Total**. The default label for the **Commit Forecast** metric is **Commit**, and the **Best Case Forecast** metric is **Best Case**.

## Pipeline Inspection Permissions Have Changed

Pipeline Inspection is now part of the Sales Cloud Included license, and continues to be available at no extra cost in Performance and Unlimited editions. To ensure continued use of Pipeline Inspection, reassign users to the Pipeline Inspection Included permission set. This change is recommended in Summer '22, and could become required in a later release.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions. Pipeline Inspection isn't enabled automatically.

**Who:** This change applies to users who were assigned the Pipeline Inspection User permission set before Summer '22.

## Productivity Features

Einstein Activity Capture users can override automatic associations and use a new email insight. Sales reps can also create calendar events directly from availability view and take advantage of several new email features.

### IN THIS SECTION:

#### [Einstein Activity Capture](#)

In the activity timeline, override the automatic associations made between a captured email and related records. Use a new email insight to help sales reps stay current on emails that include objections about deals. Add users to a configuration by way of profile IDs from an external API.

#### [Email Experience](#)

You can use an existing org-wide email address as a default No-Reply email address. Some users receive emailed links to verify their existing email addresses. And your org can send more automated emails in High Velocity Sales.

#### [Email Templates](#)

Get more control over your Email Template Builder workspace with an adjustable property panel, and adjust your template's padding without confusion.

### Activities

New activities features let your reps work more quickly. See overdue tasks at a glance with due dates in red. Identify unanswered questions after customer meetings with the question insight. Get right to the heart of insights with a unified layout that avoids distractions. And quickly manage records that Einstein Activity Capture automatically related to an email straight from the activity timeline.

### Salesforce Inbox

Inbox is now part of the Sales Cloud Included license, which comes at no extra cost in Performance and Unlimited editions.

### Calendar

Save time by creating events directly from the calendar grid in availability view. Scroll less and see more of your calendar area by collapsing calendar user lists.

## Einstein Activity Capture

In the activity timeline, override the automatic associations made between a captured email and related records. Use a new email insight to help sales reps stay current on emails that include objections about deals. Add users to a configuration by way of profile IDs from an external API.

### IN THIS SECTION:

#### [Manage Associations Between Automatically Captured Emails and Related Records](#)

Emails that Einstein Activity Capture users send and receive are captured and automatically added to the activity timeline of related account, contact, lead, opportunity, contract, and quote records. Now you can override these automatic associations in the activity timeline. You can remove some or all the associations between an email and related records, or add new associations. For example, Einstein Activity Capture adds an email to the activity timeline of an opportunity record. But you determine that the opportunity doesn't have much to do with that email, so you remove the association to it. You can search for and add an association to a more relevant opportunity.

#### [See More Info When Sensitive or Automated Emails Aren't Shared Automatically](#)

The activity timeline has a more cohesive, coherent look when Einstein Activity Capture doesn't automatically share an email that contains sensitive or automated content. Now you see the reason the email wasn't shared and sharing settings in one convenient location.

#### [Discover Lead Objections Sooner with a New Einstein Email Insight](#)

Help sales reps stay on top of critical emails that mention concerns that are stopping an engagement from moving forward. Einstein Email Insights now include an Objection Made insight. Insights make it easier to send the perfect response at the perfect time.

#### [Get Another Option for Adding Users to a Configuration](#)

Use an external API to add a profile ID and its associated users to an Einstein Activity Capture configuration. Previously via an external API, you could add users to a configuration using only user IDs.

#### [Get Einstein Activity Capture in Performance and Unlimited Editions Without an Add-On License](#)

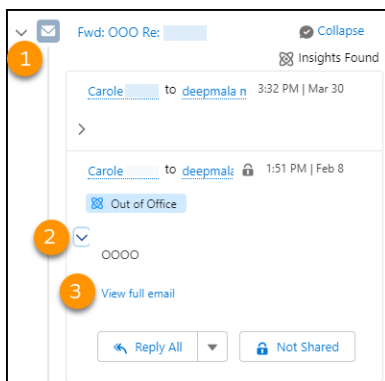
Einstein Activity Capture is a critical part of a sales team's tool set, especially for larger businesses. Because Einstein Activity Capture is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions.

## Manage Associations Between Automatically Captured Emails and Related Records

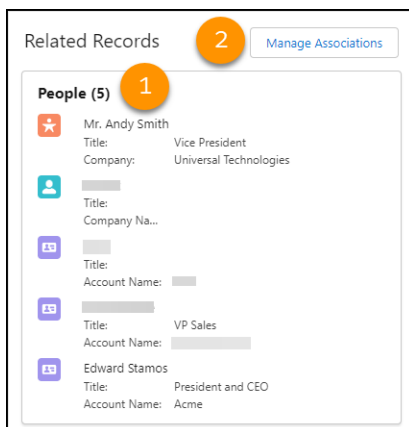
Emails that Einstein Activity Capture users send and receive are captured and automatically added to the activity timeline of related account, contact, lead, opportunity, contract, and quote records. Now you can override these automatic associations in the activity timeline. You can remove some or all the associations between an email and related records, or add new associations. For example, Einstein Activity Capture adds an email to the activity timeline of an opportunity record. But you determine that the opportunity doesn't have much to do with that email, so you remove the association to it. You can search for and add an association to a more relevant opportunity.

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

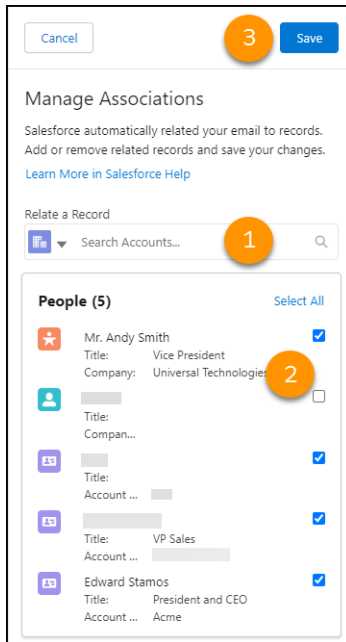
**How:** To open a captured email from the activity timeline on a record, follow these steps.



Expand the email (1) (2), and click **View full email** (3).



See all the related records that are associated with the email (1). To edit the associations, click **Manage Associations** (2).



Search for a different record to associate the email with in **Relate a Record** (1). To remove an association, deselect it (2). Save your changes (3).

#### SEE ALSO:

[Manage Automatically Associated Records from the Email Dropdown in the Activity Timeline](#)

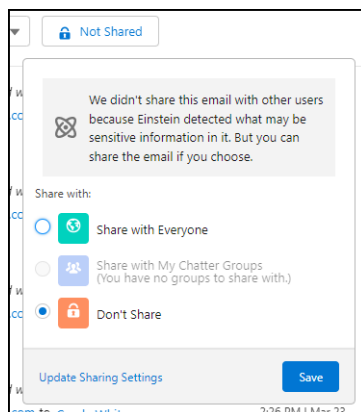
[Salesforce Help: Guidelines for Using Emails with Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## See More Info When Sensitive or Automated Emails Aren't Shared Automatically

The activity timeline has a more cohesive, coherent look when Einstein Activity Capture doesn't automatically share an email that contains sensitive or automated content. Now you see the reason the email wasn't shared and sharing settings in one convenient location.

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

**Why:** Einstein Activity Capture attempts to identify emails with sensitive information and automated responses before they're added to the timeline, and it sets sharing to Don't Share. New text makes the reasoning for not sharing the email clearer, and it informs users that they can share the email if they choose.





## SEE ALSO:

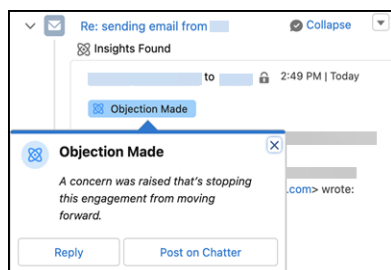
[See Why Sensitive or Automated Emails Aren't Shared](#)[Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## Discover Lead Objections Sooner with a New Einstein Email Insight

Help sales reps stay on top of critical emails that mention concerns that are stopping an engagement from moving forward. Einstein Email Insights now include an Objection Made insight. Insights make it easier to send the perfect response at the perfect time.

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

**Why:** Say a sales rep sees the Objection Made insight next to an email in the activity timeline or in Inbox. The Objection Made insight tells the rep that the lead has expressed serious issues that prevent them from going forward with a deal. The rep can respond quickly by sending an email that attempts to assuage the lead's concerns or by scheduling a meeting with the lead.



As part of this change, the Not Interested insight is retired. The Objection Made insight covers the same buyer concerns and more, including budgetary, authority-based, timing, and need-based objections.

## SEE ALSO:

[Learn More from New Insights in the Activity Timeline](#)[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

## Get Another Option for Adding Users to a Configuration

Use an external API to add a profile ID and its associated users to an Einstein Activity Capture configuration. Previously via an external API, you could add users to a configuration using only user IDs.

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

**Why:** In Summer '20, we added the UserEmailCalendarSync object, which lets developers add users to an Einstein Activity Capture configuration. The API lets you add more than 500 users or profiles at a time to a configuration. Now you can add users to a configuration via a profile ID and a user ID. You can add a profile to only one configuration. Similarly, a user can have only one profile assigned to it.

**How:** In Apex or after uploading a file, use a profile ID as an input parameter from an external API to insert a new value. `AssignedId` can be the profile or the user ID. In Salesforce, review the configuration to confirm that the profile was added. Also confirm the connection status for all the associated user accounts.

SEE ALSO:

[Salesforce Help: Create a Configuration for Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Check Connection Status for Einstein Activity Capture Users \(can be outdated or unavailable during release preview\)](#)

## Get Einstein Activity Capture in Performance and Unlimited Editions Without an Add-On License

Einstein Activity Capture is a critical part of a sales team's tool set, especially for larger businesses. Because Einstein Activity Capture is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions.

**Where:** This change applies to Lightning Experience in Performance and Unlimited editions. Einstein Activity Capture is not enabled automatically.

**Who:** This change applies to users who accessed Einstein Activity Capture through the Sales Cloud Einstein, Inbox, High Velocity Sales, or Revenue Intelligence license before Summer '22.

**How:** To ensure continued use of Einstein Activity Capture features, assign users to the Einstein Activity Capture Included, Sales Cloud Included Bundle, or custom permission set. The Sales Cloud Included Bundle permission set also grants access to other Sales Cloud Included features, such as Salesforce Inbox and Einstein Lead Scoring. This change is recommended in Summer '22.

SEE ALSO:

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

## Email Experience

You can use an existing org-wide email address as a default No-Reply email address. Some users receive emailed links to verify their existing email addresses. And your org can send more automated emails in High Velocity Sales.

IN THIS SECTION:

[Configure a Single Default No-Reply Address from Organization-Wide Addresses in Setup](#)

You can use an existing org-wide email address as a default No-Reply email address. Choose multiple purposes for an existing org-wide email address in the record page.

[Verify Your Email Address to Send Email Through Salesforce](#)

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 with a link to verify that you own the email address. We send this message one time per release cycle. For free and trial orgs, including orgs configured to use SSO, email verification is required with this release. Unverified email addresses can't be used for sends until the user verifies the email address.

[Updated Automated Email Send Limits in High Velocity Sales](#)

If your company sends email through external services such as Office 365, Gmail, or Inbox, each HVS (High Velocity Sales) rep can send up to 1,000 automated emails a day. HVS automated emails don't count toward your org's email or list email limits.

## Configure a Single Default No-Reply Address from Organization-Wide Addresses in Setup

You can use an existing org-wide email address as a default No-Reply email address. Choose multiple purposes for an existing org-wide email address in the record page.

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

**When:** This change takes effect for all orgs with this release.

## Verify Your Email Address to Send Email Through Salesforce

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 with a link to verify that you own the email address. We send this message one time per release cycle. For free and trial orgs, including orgs configured to use SSO, email verification is required with this release. Unverified email addresses can't be used for sends until the user verifies the email address.

**Where:** This change applies to Lightning Experience and Salesforce Classic in all editions. This change doesn't apply to paid SSO orgs.

**When:** We plan to prevent sends from [any email address without updated verification tracking](#) by the start of the Winter '23 release.

## Updated Automated Email Send Limits in High Velocity Sales

If your company sends email through external services such as Office 365, Gmail, or Inbox, each HVS (High Velocity Sales) rep can send up to 1,000 automated emails a day. HVS automated emails don't count toward your org's email or list email limits.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with a High Velocity Sales license.

SEE ALSO:

[Updated Send Limits for Automated Emails in High Velocity Sales](#)

[Salesforce Help: Streamline Prospect Outreach with Sales Cadences \(can be outdated or unavailable during release preview\)](#)

## Email Templates

Get more control over your Email Template Builder workspace with an adjustable property panel, and adjust your template's padding without confusion.

IN THIS SECTION:

[Control Your Workspace in Email Template Builder and Email Content Builder](#)

Adjust the width of the property panel in Email Template Builder and Email Content Builder to help you complete your email templates more efficiently. Make the panel wider so that you can more easily see what you're doing.

[Pad Your Template with Confidence in Email Template Builder](#)

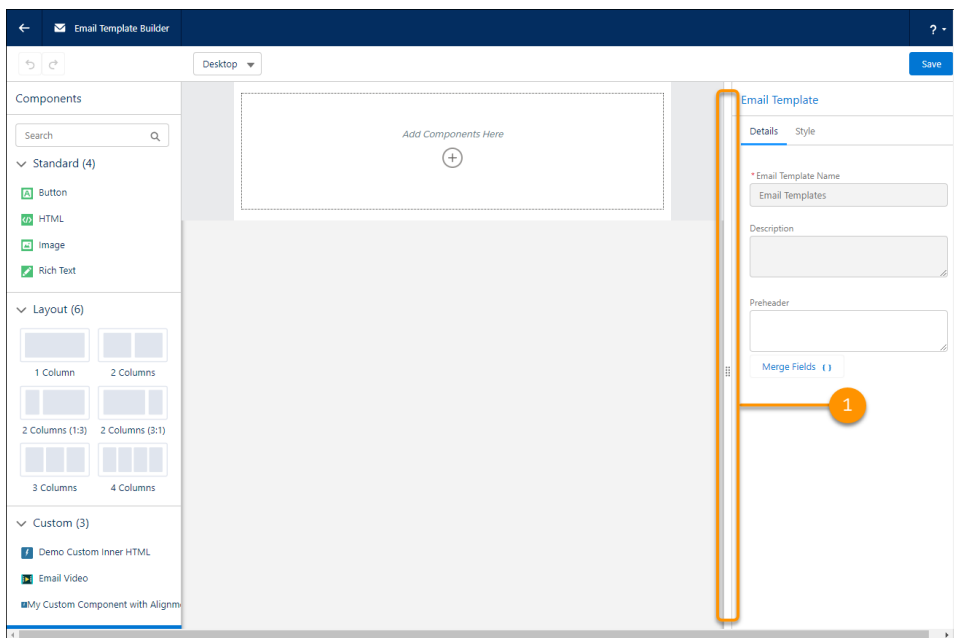
New labels dispel any confusion about which aspect of padding you're adjusting in the email template Style tab.

## Control Your Workspace in Email Template Builder and Email Content Builder

Adjust the width of the property panel in Email Template Builder and Email Content Builder to help you complete your email templates more efficiently. Make the panel wider so that you can more easily see what you're doing.

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

**How:** Grab and move the dividing line (1).



SEE ALSO:

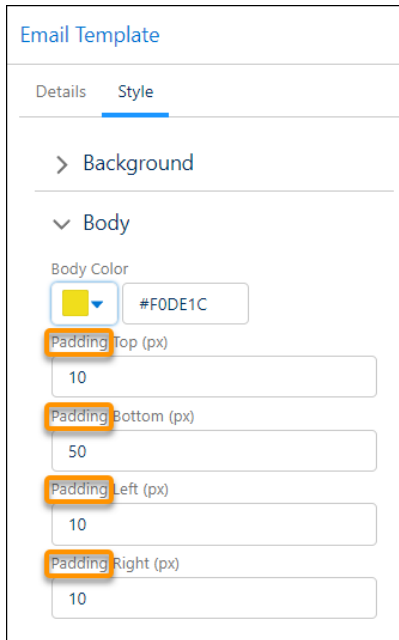
[Salesforce Help: Email Template Builder \(can be outdated or unavailable during release preview\)](#)

## Pad Your Template with Confidence in Email Template Builder

New labels dispel any confusion about which aspect of padding you're adjusting in the email template Style tab.

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

**How:** Open an email template in Email Template Builder. Select the Style tab in the Email Template properties panel, then expand the Body section.



The screenshot shows the 'Email Template' editor with the 'Style' tab selected. Under the 'Background' section, the 'Body' section is expanded. The 'Body Color' is set to a yellow color with the hex code #F0DE1C. Below this, there are four input fields for padding, each with a label and a value: 'Padding Top (px)' is 10, 'Padding Bottom (px)' is 50, 'Padding Left (px)' is 10, and 'Padding Right (px)' is 10. The labels for each padding field are highlighted with orange boxes.

SEE ALSO:

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

## Activities

New activities features let your reps work more quickly. See overdue tasks at a glance with due dates in red. Identify unanswered questions after customer meetings with the question insight. Get right to the heart of insights with a unified layout that avoids distractions. And quickly manage records that Einstein Activity Capture automatically related to an email straight from the activity timeline.

### IN THIS SECTION:

#### [Spot Overdue Tasks Right Away](#)

Due dates for overdue tasks now appear in red, making them easy to spot.

#### [Learn More from New Insights in the Activity Timeline](#)

Identify concerns that are preventing an engagement from advancing with the Objection Made email insight. Spot unanswered buyer and seller questions in customer calls and videos with the Question insight in Einstein Conversation Insights.

#### [Focus on Insights Faster with a Unified Layout](#)

Email, voice, and video insights now use the same popover layout so that you can get the information you need faster. Popovers appear when you hover over an insight's name in the activity timeline.

#### [See Why Sensitive or Automated Emails Aren't Shared](#)

The activity timeline now reveals why an email wasn't automatically shared, and shows the sharing settings in one location.

#### [Manage Automatically Associated Records from the Email Dropdown in the Activity Timeline](#)

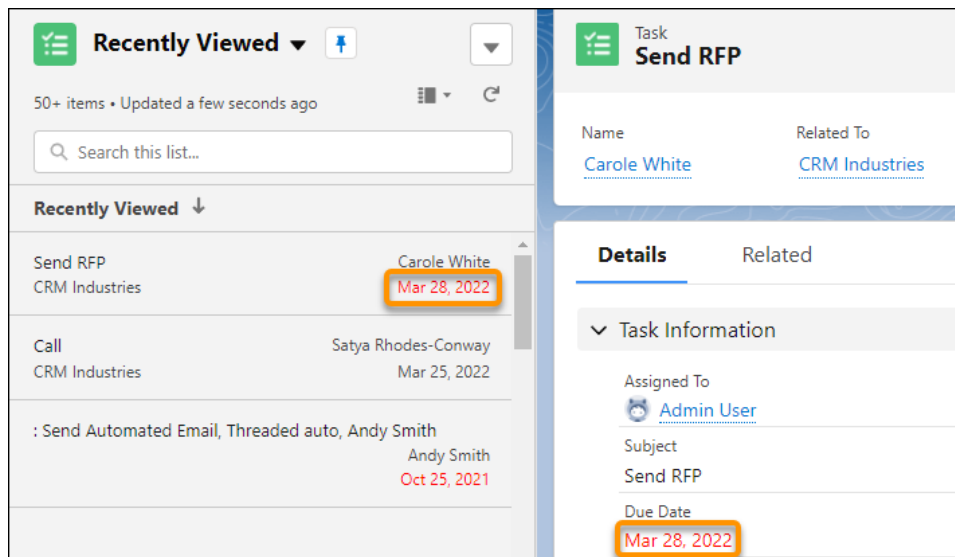
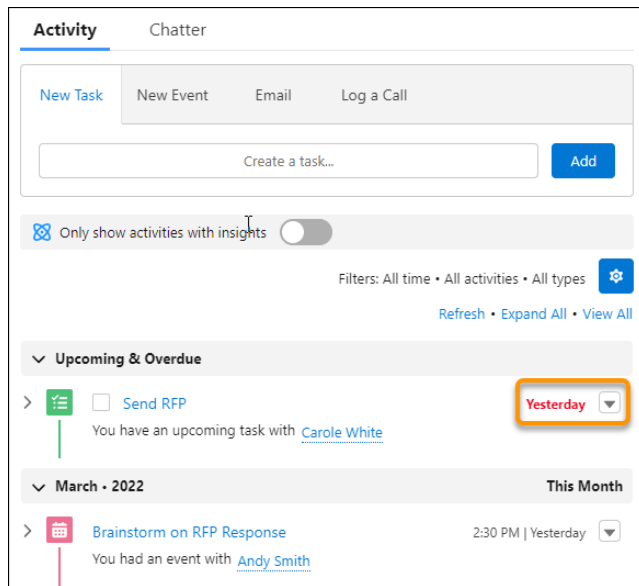
For emails that Einstein Activity Capture automatically relates to a record, remove some or all of the associations, or add new associations, in the activity timeline.

## Spot Overdue Tasks Right Away

Due dates for overdue tasks now appear in red, making them easy to spot.

**Where:** Available in Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** The date appears in red in the activity timeline, the task list view, the task detail view, the task Kanban view, and the task split view.



SEE ALSO:

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

## Learn More from New Insights in the Activity Timeline

Identify concerns that are preventing an engagement from advancing with the Objection Made email insight. Spot unanswered buyer and seller questions in customer calls and videos with the Question insight in Einstein Conversation Insights.

**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions. This change also applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**How:** These new insights appear in the activity timeline. Hover over, or click, the insight for more information.

SEE ALSO:

[Discover Lead Objections Sooner with a New Einstein Email Insight](#)

[See Call Questions Automatically with Questions Insights](#)

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

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

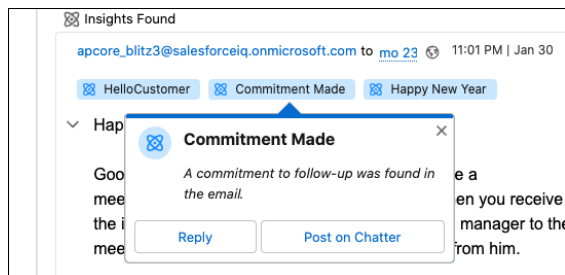
[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

## Focus on Insights Faster with a Unified Layout

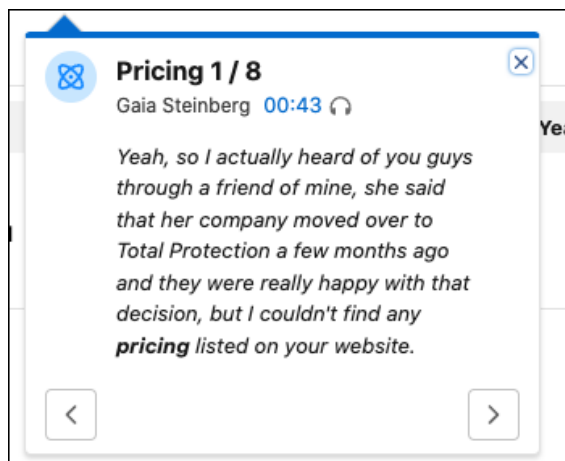
Email, voice, and video insights now use the same popover layout so that you can get the information you need faster. Popovers appear when you hover over an insight's name in the activity timeline.

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

**Why:** With a uniform layout for all insights popovers, it's easier to focus on the information.



An email insight has the insight name and its description.



A video or voice popover also has the insight name and its description. There's a link to the location of the insight in the video or call transcript. And if there's more than one insight, previous and next buttons navigate to the other insights.

SEE ALSO:

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

[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

## See Why Sensitive or Automated Emails Aren't Shared

The activity timeline now reveals why an email wasn't automatically shared, and shows the sharing settings in one location.

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

**Why:** Einstein Activity Capture attempts to identify emails with sensitive information and automated responses before they're added to the timeline, and it sets sharing to Don't Share. The activity timeline says why an email wasn't shared, and it informs users that they can choose to share the email.

SEE ALSO:

[See More Info When Sensitive or Automated Emails Aren't Shared Automatically](#)

[Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

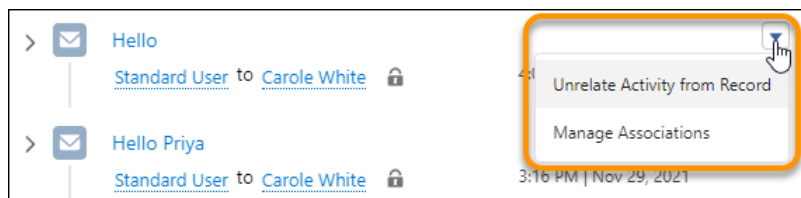
## Manage Automatically Associated Records from the Email Dropdown in the Activity Timeline

For emails that Einstein Activity Capture automatically relates to a record, remove some or all of the associations, or add new associations, in the activity timeline.

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

**How:** In the activity timeline, click the email's dropdown.





SEE ALSO:

[Manage Associations Between Automatically Captured Emails and Related Records](#)

[Salesforce Help: Guidelines for Using Emails with Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## Salesforce Inbox

Inbox is now part of the Sales Cloud Included license, which comes at no extra cost in Performance and Unlimited editions.

IN THIS SECTION:

[Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License](#)

Inbox is a critical part of a sales team's tool set, especially for larger businesses. Because Inbox is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions.

[Salesforce Inbox Mobile](#)

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

### Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License

Inbox is a critical part of a sales team's tool set, especially for larger businesses. Because Inbox is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions.

**Where:** This change applies to Lightning Experience in Performance and Unlimited editions. Inbox features are not enabled automatically. Inbox Mobile isn't included with Unlimited and Performance editions.

**Who:** This change applies to users who accessed Inbox through the Inbox, Sales Cloud Einstein, or High Velocity Sales license before Summer '22.

**How:** To ensure continued use of Inbox features, assign users to the Sales Cloud Included, Inbox Included, or custom permission set. The Sales Cloud Included Bundle permission set also grants access to other Sales Cloud Included features, such as Salesforce Meetings and Einstein Lead Scoring. This change is recommended in Summer '22.

SEE ALSO:

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

### 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](#)

## Calendar

Save time by creating events directly from the calendar grid in availability view. Scroll less and see more of your calendar area by collapsing calendar user lists.

IN THIS SECTION:

[Create an Event Quickly by Clicking in Availability View](#)

Scan to see who's free and create an event by clicking directly in any calendar in availability view in Lightning Experience. Previously, you could create an event by clicking only in the My Events calendar in availability view.

[Expand and Collapse User Lists](#)

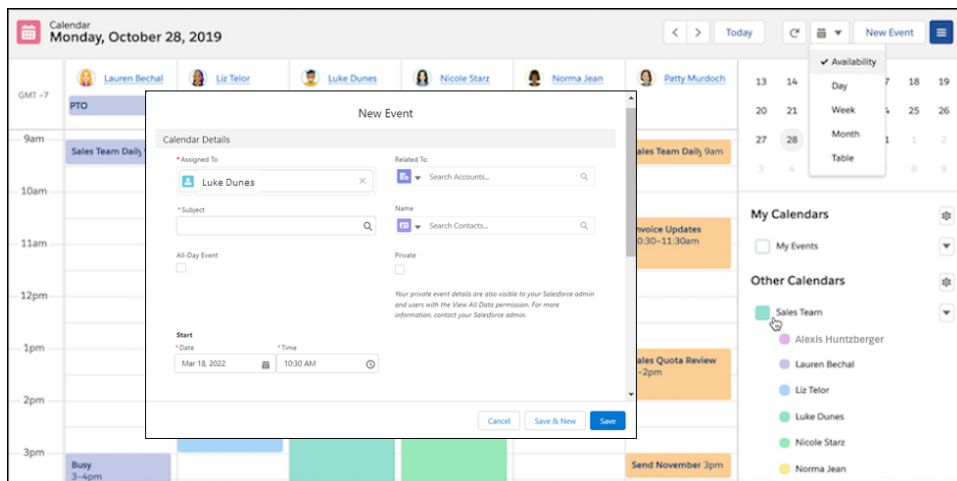
If you have user lists with multiple calendars, save screen space and reduce scrolling by collapsing them in your calendar. Salesforce remembers whether you expanded or collapsed user lists the next time you log in.

### Create an Event Quickly by Clicking in Availability View

Scan to see who's free and create an event by clicking directly in any calendar in availability view in Lightning Experience. Previously, you could create an event by clicking only in the My Events calendar in availability view.

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

**How:** In Lightning Experience, switch to availability view, and view multiple user calendars. In the calendar grid, click a time slot, and a new event appears with date, time, and the assigned user already filled in.



SEE ALSO:

[Salesforce Help: Calendar Views in Lightning Experience](#) (can be outdated or unavailable during release preview)

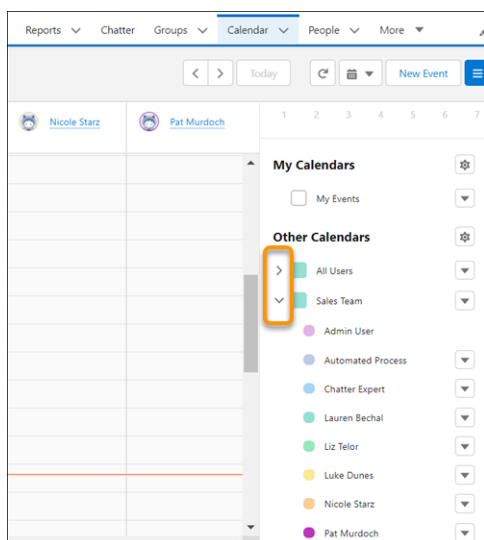
[Salesforce Help: View Coworkers' Calendars in Lightning Experience](#) (can be outdated or unavailable during release preview)

## Expand and Collapse User Lists

If you have user lists with multiple calendars, save screen space and reduce scrolling by collapsing them in your calendar. Salesforce remembers whether you expanded or collapsed user lists the next time you log in.

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

**How:** In your calendar, in the side pane, click to the left of a user list. If user lists aren't displayed, go to Activity Settings in Setup, and enable the **Add user lists to calendar views in Lightning Experience** setting.



SEE ALSO:

[Salesforce Help: View Coworkers' Calendars in Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Customization Options for Events and Calendars](#) (can be outdated or unavailable during release preview)

# Salesforce Maps

Access the Salesforce Maps portfolio of products in the same languages as Salesforce. Discover data that’s available in the countries where you do business. Navigate a new home screen for approvals, alignments, and datasets in Territory Planning. And import data using more options for queries and CSV files.

IN THIS SECTION:

[Salesforce Maps](#)

Experience Salesforce Maps in more languages and the same accessibility standards as Salesforce. Access data coverage for the countries that matter to your business.

[Salesforce Maps Territory Planning](#)

Discover a new home screen where you access approval requests, recent alignments and datasets, and a timeline of changes. Get the latest boundaries as updates become available when you clone and refresh datasets. And assign roles from a list of the territory roles available in Salesforce.

# Salesforce Maps

Experience Salesforce Maps in more languages and the same accessibility standards as Salesforce. Access data coverage for the countries that matter to your business.

IN THIS SECTION:

[Access the Salesforce Maps Portfolio in More Languages](#)

Salesforce Maps, Salesforce Maps Advanced, and Territory Planning now support many of the same languages and accessibility standards as Salesforce.

[Identify Data Coverage for Salesforce Maps and Related Products](#)

Access coverage for the data that’s available in Salesforce Maps, Salesforce Maps Advanced, and Territory Planning. For each country that matters to you, identify available data such as geocoding, routing, and territory boundaries.

[Access Updated NAICS Codes](#)

Filter business data in Salesforce Maps using the most up-to-date codes available from the North American Industry Classification System (NAICS).

# Access the Salesforce Maps Portfolio in More Languages

Salesforce Maps, Salesforce Maps Advanced, and Territory Planning now support many of the same languages and accessibility standards as Salesforce.

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

**Why:** The Salesforce Maps portfolio now meets Salesforce localization and accessibility standards more fully. Here’s how.

For...	The Salesforce Maps portfolio now...	But it doesn’t currently...
Localization	Includes translations for: <ul style="list-style-type: none"><li>• Page headings and introductory text</li><li>• Field labels</li><li>• Field selections</li></ul>	Include translations for: <ul style="list-style-type: none"><li>• Validation messages</li><li>• Confirmation messages</li><li>• Error messages</li></ul>

For...	The Salesforce Maps portfolio now...	But it doesn't currently...
Accessibility	Meets Salesforce standards for many product areas in terms of: <ul style="list-style-type: none"> <li>• Color contrast guidelines</li> <li>• Screen readers</li> <li>• Keyboard navigation</li> </ul>	Meet all Salesforce accessibility standards.

SEE ALSO:

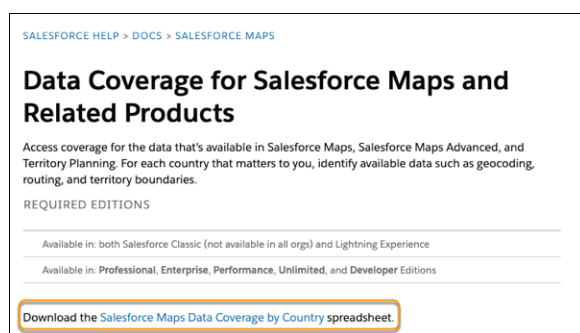
[Salesforce Help: Supported Languages](#)

## Identify Data Coverage for Salesforce Maps and Related Products

Access coverage for the data that's available in Salesforce Maps, Salesforce Maps Advanced, and Territory Planning. For each country that matters to you, identify available data such as geocoding, routing, and territory boundaries.

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

**How:** For details about data coverage, download the spreadsheet from [Data Coverage for the Salesforce Maps Product Portfolio](#).



## Access Updated NAICS Codes

Filter business data in Salesforce Maps using the most up-to-date codes available from the North American Industry Classification System (NAICS).

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

**How:** Learn more about new and updated codes in [Salesforce Maps Business Data - NAICS 2022 Revision](#).

## Salesforce Maps Territory Planning

Discover a new home screen where you access approval requests, recent alignments and datasets, and a timeline of changes. Get the latest boundaries as updates become available when you clone and refresh datasets. And assign roles from a list of the territory roles available in Salesforce.

## IN THIS SECTION:

[Navigate Datasets, Alignments, and Approval Requests Easily](#)

Discover the most recent and relevant datasets and alignments on the new home screen in Salesforce Maps Territory Planning. Identify alignments waiting for approval, get dataset and alignment details at a glance, and track a timeline of changes in a central location. Plus, the home screen supports Salesforce accessibility standards.

[Plan Territories Using the Latest Boundaries](#)

Update certain boundaries when you clone and refresh datasets. Available updates to boundaries depend on their locations and when you created them in Salesforce Maps Territory Planning.

[Establish Custom Relationships in Datasets](#)

Save time when you connect data from one Salesforce object to another using SOQL queries in Salesforce Maps Territory Planning. When you do, you avoid the extra step of creating custom fields and report types.

[Import Data with Greater Flexibility in CSV Files](#)

Preserve assignments for specific units. And import data into Salesforce Maps Territory Planning using 15-character or 18-character record IDs in CSV files.

[Assign Roles Within Territories](#)

Take the guesswork out of role assignments in Salesforce Maps Territory Planning. Instead of entering roles manually, select from the roles established in Enterprise Territory Management or the roles that you created for planning territories. Identify the users in each role in the legend.

[Manage Assignments for US Standard and Point ZIP Codes](#)

Assign units and balance territories among standard and point ZIP codes. Account for large businesses, organizations, and buildings as you create your territory model in Salesforce Maps Territory Planning.

## Navigate Datasets, Alignments, and Approval Requests Easily

Discover the most recent and relevant datasets and alignments on the new home screen in Salesforce Maps Territory Planning. Identify alignments waiting for approval, get dataset and alignment details at a glance, and track a timeline of changes in a central location. Plus, the home screen supports Salesforce accessibility standards.

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

**How:** To see all the benefits of the new home screen, open Territory Planning.

**Territory Planning Home**

**Pending Approvals**  
Approve or reject pending approvals

Alignment Details	Dataset	Requested On	Requested By	
<a href="#">Accounts for Enterprise Territory Management</a>	All Accounts in USA	4/5/2022	Noella Seravat	<a href="#">Open</a>

**Recently Viewed Alignments** [Create Alignment](#)

**Northeast US Accou...**

Dataset Name: North Carolina Ac...  
Created Date: 10/25/2021, 1:36 ...  
Created By: Felix Ayaso  
Last Modified Date: 4/6/2022, 10:21 AM  
Last Modified By: Felix Ayaso  
Shared With Users: 0  
Approval Status: **In Progress**

**Field and Virtual Clo...**

Dataset Name: Field and Virtual ...  
Created Date: 12/6/2021, 4:09 PM  
Created By: Felix Ayaso  
Last Modified Date: 4/6/2022, 10:20 ...  
Last Modified By: Noella Seravat  
Shared With Users: 1  
Approval Status: **In Progress**

**Summer Product La...**

Dataset Name: All Accounts in U...  
Created Date: 10/25/2021, 1:54 ...  
Created By: Felix Ayaso  
Last Modified Date: 4/6/2022, 10:17 AM  
Last Modified By: Felix Ayaso  
Shared With Users: 1  
Approval Status: **In Progress**

**History** [Comments](#)

Activity Type: [Refresh](#) [Expand All](#)

- Optimized Focus** 4/6/2022, 10:20 AM  
Felix Ayaso optimized focus on Northeast US Accounts
- Optimized Focus** 4/6/2022, 10:10 AM  
Felix Ayaso optimized focus on Virtual Only
- Optimized Focus** 4/6/2022, 10:03 AM  
Felix Ayaso optimized focus on Winter Product Launch
- Optimized Focus** 4/6/2022, 9:55 AM  
Felix Ayaso optimized focus on Model for Territory Management System
- Optimized Focus** 4/6/2022, 9:52 AM  
Felix Ayaso optimized focus on Field and Virtual Clone
- Optimized Focus** 4/6/2022, 9:49 AM  
Felix Ayaso optimized focus on Field and Virtual Clone

## SEE ALSO:

[Salesforce Help: Set Up an Approval Process for Alignments](#)

## Plan Territories Using the Latest Boundaries

Update certain boundaries when you clone and refresh datasets. Available updates to boundaries depend on their locations and when you created them in Salesforce Maps Territory Planning.

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

**How:** For details about data coverage, download the spreadsheet from [Data Coverage for the Salesforce Maps Product Portfolio](#).



After you download the spreadsheet, select its Fixed Boundaries tab, which lists the boundary versions that aren't available to refresh.

## Establish Custom Relationships in Datasets

Save time when you connect data from one Salesforce object to another using SOQL queries in Salesforce Maps Territory Planning. When you do, you avoid the extra step of creating custom fields and report types.

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

**How:** When you create datasets, join data from one object to another by specifying custom relationships in SOQL queries. For example, you plan territories for accounts and you want to relate territory information, such as territory IDs and names, to them.

The image shows two overlapping screenshots from the Salesforce Maps interface. The top screenshot is the 'Build Object Query' window, where a query is being constructed. The 'Query Name' is 'Accounts with Territories', the 'Object' is 'Account', and the 'SQL Query' is 'SELECT Id,Name,BillingLatitude,BillingLongitude,AnnualRevenue,NumberOfEmployees,TerritoryLookup\_\_r.Name FROM Account'. The 'TerritoryLookup\_\_r.Name' field is highlighted with an orange box. The bottom screenshot is the 'Create Dataset' window, showing a list of queries. The query 'Accounts with Territories' is selected, and its record count is 9764. The 'Include in Dataset' checkbox is checked, and the 'Aggregate Records' toggle is off.

## Import Data with Greater Flexibility in CSV Files

Preserve assignments for specific units. And import data into Salesforce Maps Territory Planning using 15-character or 18-character record IDs in CSV files.

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

**How:** To preserve unit assignments, add a column that represents the setting to lock units in your CSV file. Then add the value True for the units that you want to lock.

Id	UnitId	AnnualRevenue	Locked
a1A1100000Bb6ZeEAJ	0011100002Cgp4J	300	TRUE
a1A1100000Bb6ZIEAJ	0011100002Cgp4K	400	TRUE
a1A1100000Bb6ZgEAJ	0011100002Cgp4L	500	TRUE
a1A1100000Bb6ZhEAJ	0011100002Cgp4M	600	TRUE
a1A1100000Bb6ZiEAJ	0011100002Cgp4N	700	TRUE
a1A1100000Bb6ZjEAJ	0011100002Cgp4O	800	TRUE
a1A1100000Bb6ZkEAJ	0011100002Cgp4P	900	TRUE
a1A1100000Bb6ZlEAJ	0011100002Cgp4Q	1000	TRUE
a1A1100000Bb6ZmEAJ	0011100002Cgp4R	1100	TRUE
a1A1100000Bb6uLEAR	0011100002Cgp50	1200	TRUE

Then from the settings in an alignment, click **Attributes**, and in the section for your units, click **Import from CSV**. After you select the file to import, map the column that you added to the **Locked** column in Territory Planning, and then import the file.



✓ Select the column headers you want to import as attributes.

We found the following headers in your CSV. To prevent reaching data limits, only select the attributes you need. Start typing in the field column to create an attribute or select one to overwrite.

Import	CSV Column Header	Field	Format
<input type="checkbox"/>	UnitId	Add new or select	Select an Option
<input type="checkbox"/>	AnnualRevenue	Add new or select	Select an Option
<input checked="" type="checkbox"/>	Locked	Locked	N/A

Cancel Import

SEE ALSO:

[Salesforce Help: Prevent Changes to Unit Assignments](#)

## Assign Roles Within Territories

Take the guesswork out of role assignments in Salesforce Maps Territory Planning. Instead of entering roles manually, select from the roles established in Enterprise Territory Management or the roles that you created for planning territories. Identify the users in each role in the legend.

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

**How:** In Territory Planning settings, create the area roles that you want available for assignments. Map each role to an established role in Enterprise Territory Management or to a role that you created for planning territories, then define an access level.

Territory Planning  
Area Roles

**Area Roles**

Area Role	Territory
Area Owner	Account
Sales Manager	Account Manager
Solution Engineer	Pre-Sales Consultant

**New Role**

Name  
Pre-Sales Consultant  
Territory Team Role  
Pre-Sales Consultant

Cancel Save

Create an alignment, and assign a user and role to an area.

Salesforce Maps  
Territory Planning

In Progress

Legend Layers Comments History

**Edit area**

Area Details  
Optimization Settings  
Assigned Users

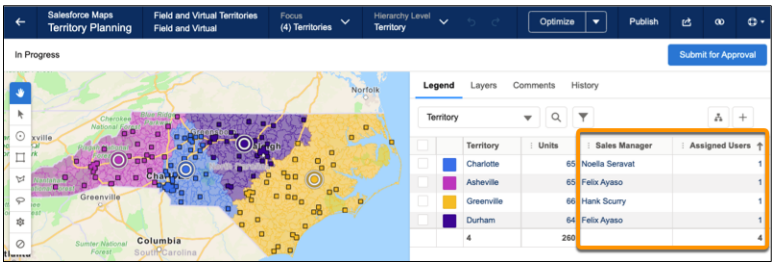
**Assign**

User  
Felix Ayaso

Role  
Sales Manager

Cancel Assign

Then add the role and assigned users to the legend for easy visibility.

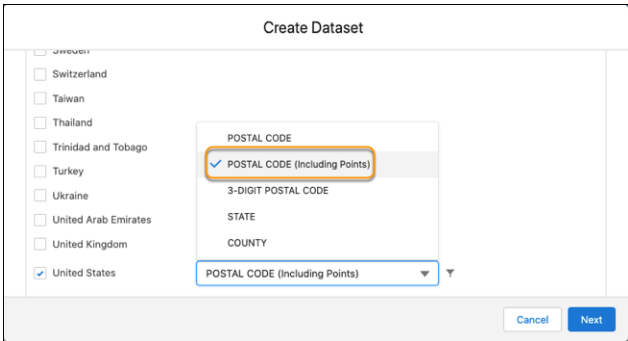


Manage Assignments for US Standard and Point ZIP Codes

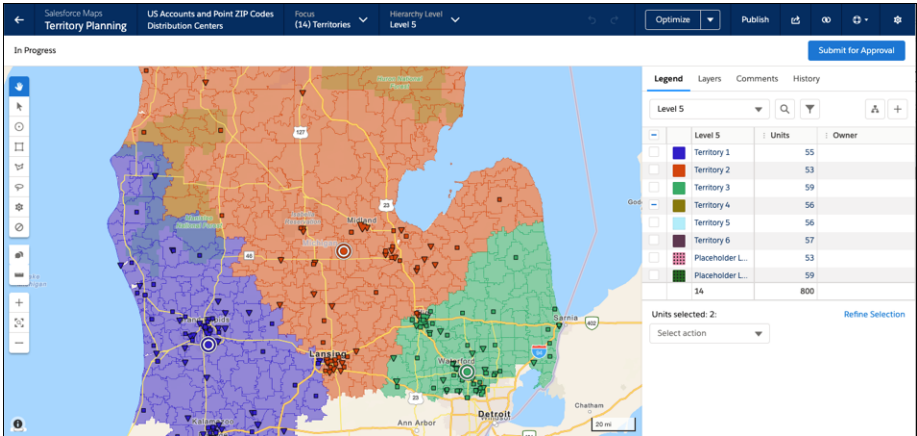
Assign units and balance territories among standard and point ZIP codes. Account for large businesses, organizations, and buildings as you create your territory model in Salesforce Maps Territory Planning.

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

**How:** When you create a dataset in Territory Planning, select **United States** for the boundary, then select the option to include point ZIP codes.



After you create an alignment and set its focus, point ZIP codes appear as inverted triangles on the map. You can search for point ZIP codes in the legend, assign them independent of their parent boundary, and publish them to Enterprise Territory Management.



## 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:

#### [Salesforce Meetings Permissions Have Changed](#)

Salesforce Meetings is now part of the Sales Cloud Included license, and continues to be available at no extra cost in Performance and Unlimited editions. To ensure continued use of the Salesforce Meetings features, reassign users to either the Salesforce Meetings Included permission set or Sales Cloud Included Bundle permission set. The new permission sets include the Use Salesforce Meetings app permission, which grants access to use the Salesforce Meetings. The Sales Cloud Included Bundle permission set also grants access to other Sales Cloud Included features, such as Salesforce Inbox and Einstein Lead Scoring. This change is recommended in Summer '22, and could become required in a later release.

#### [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.

## Salesforce Meetings Permissions Have Changed

Salesforce Meetings is now part of the Sales Cloud Included license, and continues to be available at no extra cost in Performance and Unlimited editions. To ensure continued use of the Salesforce Meetings features, reassign users to either the Salesforce Meetings Included permission set or Sales Cloud Included Bundle permission set. The new permission sets include the Use Salesforce Meetings app permission, which grants access to use the Salesforce Meetings. The Sales Cloud Included Bundle permission set also grants access to other Sales Cloud Included features, such as Salesforce Inbox and Einstein Lead Scoring. This change is recommended in Summer '22, and could become required in a later release.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**Who:** This change applies to users who were assigned the Salesforce Meetings permissions set before Summer '22.

## 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.

**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.

**Event**  
Presidio Tech Meeting

Location: Start: 8/19/2020 - 9:00 AM End: 8/19/2020 - 10:00 AM

**Meeting Digest** Details Related

**Attendees (7)**

Outside your Organization

- Dan Fitzgerald**  
Title: CPO - Chief Product Officer  
Contact Role: Economic Decision Maker  
Executive Sales  
Send Email
- Susan Gant**  
Legal  
Add Title  
Send Email
- ngillette@foxtrot.com**  
Send Email Add to Salesforce

Within your Organization

- Tracy Hwa** (Organizer)  
Title: Sales Representative
- Mary Patel**  
Executive
- Ann Roh**  
Title: Sales Engineer  
Sales

**Displaytech - Add-On Business**

Account Name: Foxtrot Holdings  
Amount: \$108,000.00  
Close Date: 5/2/2022  
Opportunity Owner: Mark Boyd

Value Proposition Id. Decisi... Percepti... Proposal/...

Stage: Value Proposition Mark Stage as Complete

**Key Fields** Edit **Guidance for Success**

Next Step

**Present the solution and understand the buying process.**

- Where are they in the buying cycle?
- What's the process to generate purchase orders?
- What's the status of quantifying a Return on Investment with them?

Refresh Expand All View All Email insights only

Upcoming & Overdue

August 2020

Presidio Tech - Kickoff Report Document

Sales Team Weekly Report Document

Competitor Analysis Spreadsheet

Linked from Related Records (0)

SEE ALSO:

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

[Salesforce Help: Guide Users with Path](#) (can be outdated or unavailable during release preview)

## Einstein Conversation Insights

Salesforce orgs using Unlimited Edition or above can access Einstein Conversation Insights features without purchasing add-on licenses. ECI now shows follow up items for voice and video calls automatically. Questions insights help sales reps and managers easily identify open-ended questions. And we're rolling out several usability improvements, including transcript searches and commenting on video call segments.

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:

[Sales Cloud Unlimited and Performance Editions Now Include Einstein Conversation Insights Without an Add-On License](#)

Salesforce orgs using Unlimited Edition or Performance Edition can access Einstein Conversation Insights without purchasing additional add-on licenses. The feature is available as part of the Sales Cloud Unlimited or Sales Cloud Performance license at no extra cost. Each license includes 120 processed hours for voice and video calls per year. Usage is calculated at the org level based on the total number of licenses rather than separately for each license. Unused hours roll over to the following year.

[Get Notifications and Information About Follow-Up Items](#)

Want to quickly see if a meeting has next steps or follow-up questions? Now you can get notified about follow-up tasks and open questions in your notifications and in the Follow Up tab.

[See Call Questions Automatically with Questions Insights](#)

Sales reps and managers can now easily identify open-ended questions asked during calls with questions insights. These automatic insights flag employee and customer questions during voice and video calls.

[Comment on Video Call Segments](#)

Einstein Conversation Insights users can now comment on portions of video calls in the same way that they can already comment on voice calls.

[Filter by Insights and See Insights in Call Transcripts](#)

The insights component now filters what is shown on voice and video call records. Users can select an insight type to display relevant sections in the player and transcript. And call transcripts display related insights directly in the Transcript tab.

[Updates to Automatic Insights](#)

We're updating the current automatic insights available across sales and service teams to be more consistent. Insights that are useful to both groups are no longer exclusive to each one.

## Sales Cloud Unlimited and Performance Editions Now Include Einstein Conversation Insights Without an Add-On License

Salesforce orgs using Unlimited Edition or Performance Edition can access Einstein Conversation Insights without purchasing additional add-on licenses. The feature is available as part of the Sales Cloud Unlimited or Sales Cloud Performance license at no extra cost. Each license includes 120 processed hours for voice and video calls per year. Usage is calculated at the org level based on the total number of licenses rather than separately for each license. Unused hours roll over to the following year.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**Who:** Einstein Conversation Insights is typically available as an add-on. Now orgs with Unlimited Edition or Performance Edition can access features without purchasing add-on licenses. However, orgs without add-on licenses are limited to 120 processed hours for voice and video calls per year for each Sales Cloud Unlimited or Sales Cloud Performance license. Unused hours roll over to the following year.

Users can access all the features available in Einstein Conversation Insights for Sales. Features specific to Einstein Conversation Insights for Service, such as the automatic insights for Service Cloud users, are not available.

**How:** If you're new to Einstein Conversation Insights in Summer '22, assign the Einstein Conversation Insights Included or Sales Cloud Included Bundle permission sets to users to avoid reassigning the permission in a later release.

If you have users in an Unlimited or Performance Edition org who accessed Einstein Conversation Insights through an add-on license before Summer '22, we recommend that you assign those users to the Sales Cloud Included permission, or custom permission set that includes it.

To make these assignments, add the new permissions to your users before removing the old permissions. Beginning in Summer '22, you can't add users to the add-on permission sets.

To manage your permission set assignments, see [Permissions Set Licenses](#).

SEE ALSO:

[Salesforce Help: Set Up Einstein Conversation Insights](#)

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

## Get Notifications and Information About Follow-Up Items

Want to quickly see if a meeting has next steps or follow-up questions? Now you can get notified about follow-up tasks and open questions in your notifications and in the Follow Up tab.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**Who:** This feature is available to users with access to Einstein Conversation Insights.

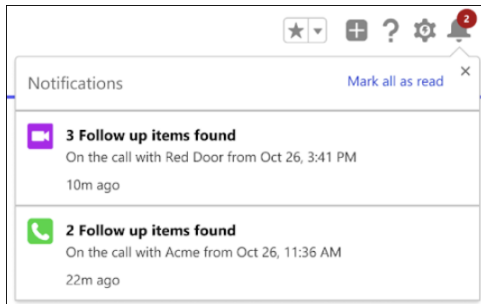
**Why:** The Follow Up tab on voice and video records shows next steps that were mentioned during conversations and any unanswered questions from the call. Each follow-up item includes a suggested action, such as sending an email, scheduling a meeting, or creating a task.

The screenshot displays the 'Follow Up' tab within the Einstein Conversation Insights interface. At the top, there are navigation tabs: 'Transcript', 'Chatter', 'Details', 'Related', and 'Follow Up', with 'Follow Up' being the active tab. Below the tabs, the section is titled 'Next Steps (2)' with a calendar icon. It contains two items, each with a quote, the speaker's name and time, and two action links: 'Send Email' and 'Listen'. The first item is from Chloe Delgado at 13:01, mentioning 'send over some times for next week'. The second item is also from Chloe Delgado at 13:15, mentioning 'reach out to Eric right now'. Below this, there is a section titled '? Questions for Follow Up (2)'. It contains one item from Gaia Leventis at 13:48 asking 'When are you planning to support zoom phone?', with 'Send Email' and 'Listen' action links.

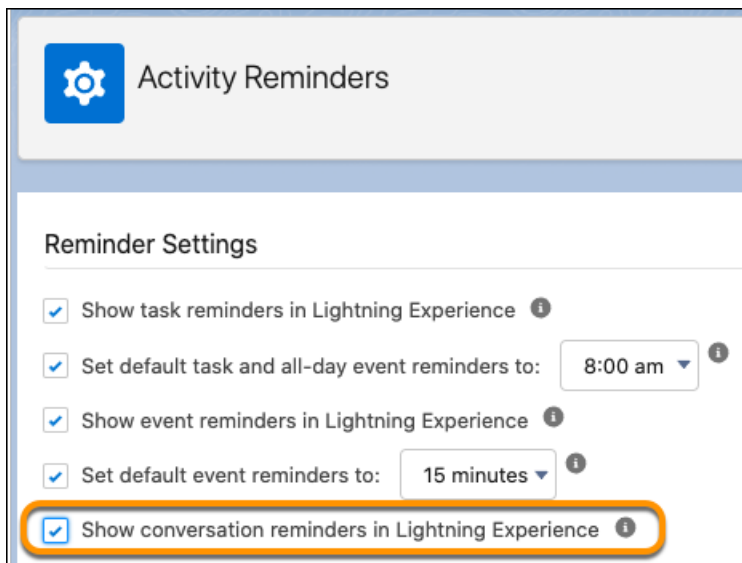
Next Steps (2)
<p>"I'll <b>send over some times for next week</b> that works for us to meet and we can go from there"</p> <p>Chloe Delgado   13:01</p> <p><a href="#">Send Email</a>   <a href="#">Listen</a></p>
<p>"Thank you very much, I really appreciate it and I'll <b>reach out to Eric</b> right now"</p> <p>Chloe Delgado   13:15</p> <p><a href="#">Send Email</a>   <a href="#">Listen</a></p>

? Questions for Follow Up (2)
<p>"When are you planning to support zoom phone?"</p> <p>Gaia Leventis   13:48</p> <p><a href="#">Send Email</a>   <a href="#">Listen</a></p>

Sales reps can also receive notifications about relevant follow-up items if calls include one.



**How:** Sales reps can turn conversation reminders on or off in their personal settings, under Activity Reminders.



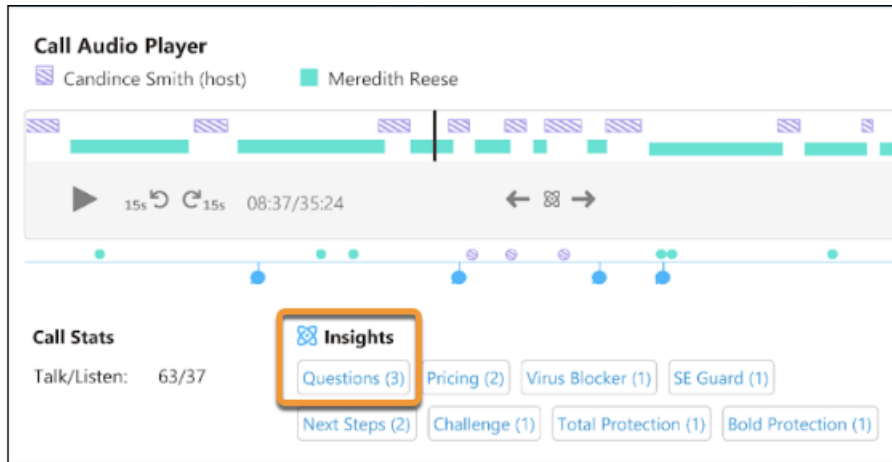
## See Call Questions Automatically with Questions Insights

Sales reps and managers can now easily identify open-ended questions asked during calls with questions insights. These automatic insights flag employee and customer questions during voice and video calls.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**Who:** This feature is available to users with access to Einstein Conversation Insights.

**Why:** Questions are available as a new type of automatic insight. Sales reps and managers can quickly jump to questions in the call player and insights bar.



Questions where sales reps indicate the need for further clarification are also tracked under the Follow Up tab.

SEE ALSO:

[Learn More from New Insights in the Activity Timeline](#)

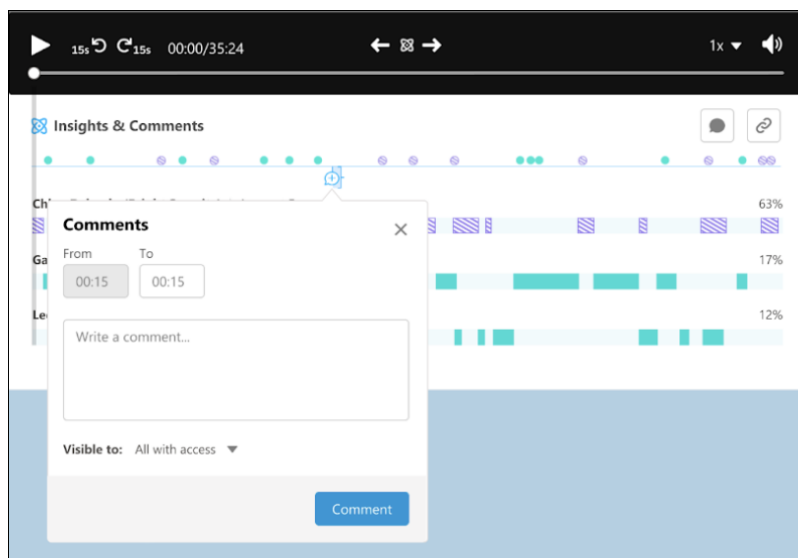
## Comment on Video Call Segments

Einstein Conversation Insights users can now comment on portions of video calls in the same way that they can already comment on voice calls.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**Who:** This feature is available to users with access to Einstein Conversation Insights.

**Why:** Conversation Insights users can add comments to specific parts of video calls by clicking the section in a recording's timeline.





The comment is tied to a specific timestamp at first, but users can edit the end time to comment on a portion of the call.

The comment appears as a popover on the timeline and on the record's Chatter feed. As with other Chatter posts, users can mention others to notify them about important updates. Click **Go to Comment** to queue the related section of the recording.

## Filter by Insights and See Insights in Call Transcripts

The insights component now filters what is shown on voice and video call records. Users can select an insight type to display relevant sections in the player and transcript. And call transcripts display related insights directly in the Transcript tab.

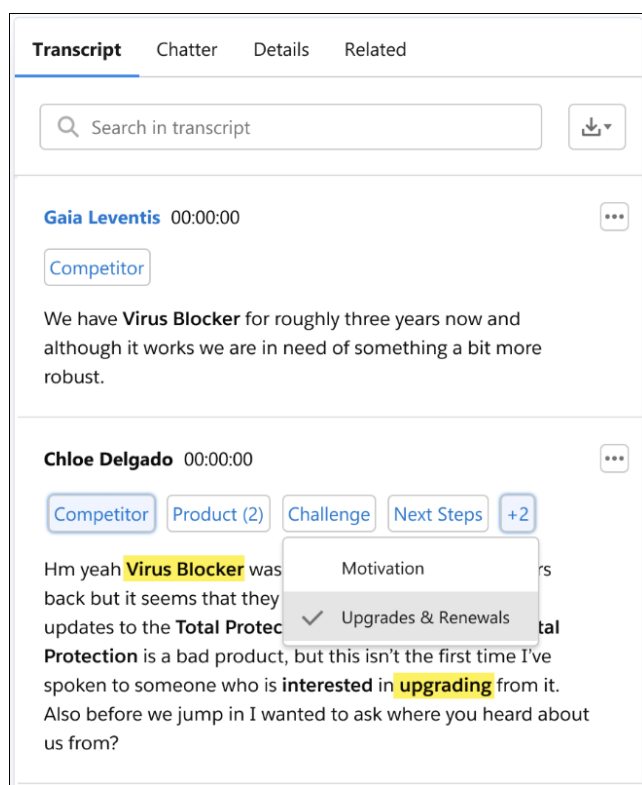
**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**Who:** This feature is available to users with access to Einstein Conversation Insights.

**Why:** Sales reps and managers can select multiple insight types on call records to filter what's displayed on the page. When an insight is selected, the player and transcript jump to the first mention related to the insight.

The insight bar is filtered to show all the selected insights, and the insight arrows jump chronologically between all mentions of the selected insights.

Different insight types also appear automatically in related transcript segments.



## Updates to Automatic Insights

We're updating the current automatic insights available across sales and service teams to be more consistent. Insights that are useful to both groups are no longer exclusive to each one.

**Where:** This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

**Who:** This feature is available to users with access to Einstein Conversation Insights.

**Why:** Sales insights now include the Longest Agent Monologue and Longest Customer Story insights. These insights track the longest turn speaking by the internal agent and customer.

Service insights now include the Trending insight, which tracks words or phrases that appear in a significant pattern across calls.

## High Velocity Sales

Add sales cadence fields to task reports and take advantage of new email send limits. The High Velocity Sales app will soon change its name to Sales Engagement, and is now included by default in Unlimited and Performance editions. The HVS permission set names are also changed in Unlimited and Performance editions.

High Velocity Sales and its features are now included in Unlimited and Performance editions, and are available for an extra cost in Enterprise edition. 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:

#### [See Related Sales Cadences in Task Reports](#)

New fields available in Task object reports let your users see the sales cadences, sales cadence states, sales cadence steps, and target dispositions related to each task.

#### [Updated Send Limits for Automated Emails in High Velocity Sales](#)

If your company sends email through external services such as Office 365, Gmail, or Inbox, you can now send more automated emails in High Velocity Sales (HVS). Each sales rep can send up to 1,000 automated emails a day. HVS automated emails don't count toward your org's email or list email limits.

#### [High Velocity Sales to Be Renamed Sales Engagement](#)

The automation features within the product have grown to include customer engagement tracking, chatbots, and sales cadences. The new name captures all the tools required to automate processes and engage strategically with leads and customers so your sales team can focus on selling. Look out for the name change coming soon!

#### [Sales Cloud Unlimited and Performance Editions Now Include High Velocity Sales Without an Add-On License](#)

Salesforce orgs using Performance or Unlimited Edition can access High Velocity Sales without purchasing additional add-on licenses. The feature is included as part of the Sales Cloud Included license at no extra cost.

#### [High Velocity Sales Permissions Have Changed](#)

High Velocity Sales is now a critical part of the sales tool set, especially for larger businesses and sales teams. Because HVS is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Unlimited and Performance editions. To ensure continued use of HVS features in Unlimited and Performance editions, reassign users to updated permissions.

## See Related Sales Cadences in Task Reports

New fields available in Task object reports let your users see the sales cadences, sales cadence states, sales cadence steps, and target dispositions related to each task.

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

**How:** In the Report Builder, add the Sales Cadence Name, State, Sales Cadence Step Title, and Target Disposition fields to Task reports.

	Subject	Sales Cadence Name	Sales Cadence Step Title	Target Disposition	State
1	: Send Automated Email, Automated M	-	-	-	-
2	Call	-	-	-	-
3	Other: Custom step, Task Logging, Tas	-	-	-	-
4	Email: Send Manual Email, Manual Man	-	-	-	-
5	List Email: this is a list email	Next Sales Cadence Test	Send Manual Email	-	Complete
6	Call: Make a call, Call cadences, Shani	-	-	-	-
7	: Send Connection Request, linkedinCu	linkedinCustomStepCadence	Send Connection Request	-	Complete
8	Call: Make a call 1, CallOnly2, H Patil, S	-	-	-	-
9	Call: Make a call 1, CallOnly2, KL Rahul	-	-	-	-
10	Email: Send Manual Email, Email Cader	-	-	-	-
11	Other: Custom step, Private Cadence, ]	-	-	-	-

**Note:** Emails captured by Einstein Activity Capture users don't appear in task reports because EAC doesn't create task records for emails.

## Updated Send Limits for Automated Emails in High Velocity Sales

If your company sends email through external services such as Office 365, Gmail, or Inbox, you can now send more automated emails in High Velocity Sales (HVS). Each sales rep can send up to 1,000 automated emails a day. HVS automated emails don't count toward your org's email or list email limits.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with a High Velocity Sales license.

SEE ALSO:

[Updated Automated Email Send Limits in High Velocity Sales](#)

[Salesforce Help: Streamline Prospect Outreach with Sales Cadences \(can be outdated or unavailable during release preview\)](#)

## High Velocity Sales to Be Renamed Sales Engagement

The automation features within the product have grown to include customer engagement tracking, chatbots, and sales cadences. The new name captures all the tools required to automate processes and engage strategically with leads and customers so your sales team can focus on selling. Look out for the name change coming soon!

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

## Sales Cloud Unlimited and Performance Editions Now Include High Velocity Sales Without an Add-On License

Salesforce orgs using Performance or Unlimited Edition can access High Velocity Sales without purchasing additional add-on licenses. The feature is included as part of the Sales Cloud Included license at no extra cost.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions. High Velocity Sales is not enabled automatically.

## High Velocity Sales Permissions Have Changed

High Velocity Sales is now a critical part of the sales tool set, especially for larger businesses and sales teams. Because HVS is a core feature set for these businesses, it's now part of the Sales Cloud Included license, which comes at no extra cost with Unlimited and Performance editions. To ensure continued use of HVS features in Unlimited and Performance editions, reassign users to updated permissions.

**Where:** This change applies to Sales Cloud in Lightning Experience in Performance and Unlimited editions.

**Who:** This change applies to users who were assigned either of the HVS permissions sets before Summer '22. If you're new to HVS in Summer '22, assign the High Velocity Sales User Included or High Velocity Sales Cadence Creator Included permission set to users to avoid reassigning the permission in a later release.

**How:** If you have users who accessed High Velocity Sales through an add-on license before Summer '22, we recommend that you assign those users to the High Velocity Sales User Included or High Velocity Sales Cadence Creator Included permission, or custom permission set that includes one of them. To make these assignments, add the new permissions to your users before removing the old permissions. Beginning in Summer '22, you can't add users to the older High Velocity Sales User or High Velocity Sales Cadence Creator permissions. For more information about managing your permission set assignments, see [Permissions Set Licenses](#).

For HVS users who also use Einstein Activity Capture and Inbox, assign the new Einstein Activity Capture Included and Inbox Included permissions.

This change is recommended in Summer '22, and will be required in Unlimited and Performance editions when an existing High Velocity Sales add-on license expires.

SEE ALSO:

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

## Sales Cloud Einstein

Estimate the value your business will see from Einstein Lead Scoring with the updated Readiness Assessor.

IN THIS SECTION:

[Estimate Your Company's Return on Investment for Einstein Lead Scoring](#)

The updated Einstein Readiness Assessor lets you estimate the value of Einstein Lead Scoring for your company based on your current lead acquisition and conversion numbers. Also, the assessor was renamed in Setup to Sales Cloud Einstein Assessor.

[Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License](#)

Sales Cloud Einstein features are a critical part of a sales team's tool set, especially for larger businesses. Because Sales Cloud Einstein is a core feature set for these businesses, most of the Sales Cloud Einstein features are now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions. Einstein Account Insights, Einstein Opportunity Insights, and Sales Analytics aren't included.

SEE ALSO:

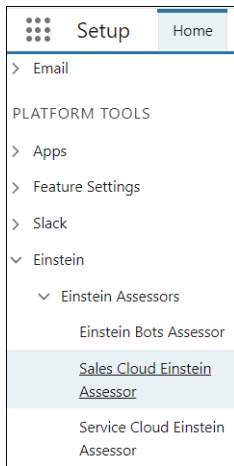
[Einstein Release Notes](#)

## Estimate Your Company's Return on Investment for Einstein Lead Scoring

The updated Einstein Readiness Assessor lets you estimate the value of Einstein Lead Scoring for your company based on your current lead acquisition and conversion numbers. Also, the assessor was renamed in Setup to Sales Cloud Einstein Assessor.

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

**How:** From Setup, in the Quick Find box, enter *Einstein*, and then select **Sales Cloud Einstein Assessor**.



## Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License

Sales Cloud Einstein features are a critical part of a sales team's tool set, especially for larger businesses. Because Sales Cloud Einstein is a core feature set for these businesses, most of the Sales Cloud Einstein features are now part of the Sales Cloud Included license, which comes at no extra cost with Performance and Unlimited editions. Einstein Account Insights, Einstein Opportunity Insights, and Sales Analytics aren't included.

**Where:** This change applies to Lightning Experience in Performance and Unlimited editions. Sales Cloud Einstein features aren't enabled automatically. Einstein Account Insights, Einstein Opportunity Insights, and Sales Analytics aren't included with Unlimited and Performance editions.

**Who:** This change applies to users that accessed Sales Cloud Einstein through the Sales Cloud Einstein license before Summer '22.

**How:** To ensure continued use of Sales Cloud Einstein features, assign users to the Sales Cloud Einstein Included, Sales Cloud Included Bundle, or custom permission set. The Sales Cloud Included Bundle permission set also grants access to other Sales Cloud Included features, such as Salesforce Inbox. This change is recommended in Summer '22.

When you set up Sales Cloud Einstein, Salesforce automatically installs two packages, SalesforceIQ Cloud and Sales Insights.

SEE ALSO:

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

[Salesforce Help: Considerations for Setting Up Sales Cloud Einstein \(can be outdated or unavailable during release preview\)](#)

## Sales Cloud for Slack (Beta)

Have your sales teams started collaborating using Sales Cloud for Slack yet? Sales Cloud for Slack becomes available as a Beta Service in Spring '22. Learn how to get started with the app today.

IN THIS SECTION:

[Check Out Sales Cloud for Slack \(Beta\)](#)

Starting the week of April 25, Sales Cloud for Slack becomes available to customers as a Beta Service in Spring '22. Learn how the app lets your sales team sell seamlessly, without leaving their conversations in Slack.

## Check Out Sales Cloud for Slack (Beta)

Starting the week of April 25, Sales Cloud for Slack becomes available to customers as a Beta Service in Spring '22. Learn how the app lets your sales team sell seamlessly, without leaving their conversations in Slack.

## Gmail Integration

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics.

### IN THIS SECTION:

#### [Manage Associations For Emails in the Gmail Integration with Einstein Activity Capture](#)

Emails that Einstein Activity Capture users send and receive are captured and added to the activity timeline of related records. In Lightning Experience, Gmail integration users who are part of an Einstein Activity Capture configuration can now edit the associations between a captured email and its related records in the activity timeline. The updated associations improve the quality of their reports, activity metrics, and analytics. In the email application pane, reps can now see a selected email's related records and sharing settings. And admins can now add quote and contract components to the email application pane in Lightning App Builder.

## Manage Associations For Emails in the Gmail Integration with Einstein Activity Capture

Emails that Einstein Activity Capture users send and receive are captured and added to the activity timeline of related records. In Lightning Experience, Gmail integration users who are part of an Einstein Activity Capture configuration can now edit the associations between a captured email and its related records in the activity timeline. The updated associations improve the quality of their reports, activity metrics, and analytics. In the email application pane, reps can now see a selected email's related records and sharing settings. And admins can now add quote and contract components to the email application pane in Lightning App Builder.

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

**Who:** This change applies to users with the Gmail integration and Einstein Activity Capture.

### SEE ALSO:

#### [Manage Associations Between Automatically Captured Emails and Related Records](#)

[Salesforce Help: Considerations for Customizing the Email Application Pane for Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

## Integration with Microsoft®

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics. To continue support for active users, full product retirement for Salesforce for Outlook is rescheduled for June 2024.

### IN THIS SECTION:

#### [Outlook Integration](#)

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics.

### [Salesforce for Outlook](#)

Full product retirement for Salesforce for Outlook is rescheduled for June 2024. If you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

## Outlook Integration

In the activity timeline, add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics.

### IN THIS SECTION:

#### [Manage Associations for Emails in the Outlook Integration with Einstein Activity Capture](#)

Emails that Einstein Activity Capture users send and receive are captured and added to the activity timeline of related records. In Lightning Experience, Outlook integration users who are part of an Einstein Activity Capture configuration can now edit the associations between a captured email and its related records in the activity timeline. The updated associations improve the quality of their reports, activity metrics, and analytics. In the email application pane, reps can now see a selected email's related records and sharing settings. And admins can now add quote and contract components to the email application pane in Lightning App Builder.

## Manage Associations for Emails in the Outlook Integration with Einstein Activity Capture

Emails that Einstein Activity Capture users send and receive are captured and added to the activity timeline of related records. In Lightning Experience, Outlook integration users who are part of an Einstein Activity Capture configuration can now edit the associations between a captured email and its related records in the activity timeline. The updated associations improve the quality of their reports, activity metrics, and analytics. In the email application pane, reps can now see a selected email's related records and sharing settings. And admins can now add quote and contract components to the email application pane in Lightning App Builder.

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

**Who:** This change applies to users with the Outlook integration and Einstein Activity Capture.

### SEE ALSO:

[Manage Associations Between Automatically Captured Emails and Related Records](#)

[Salesforce Help: Considerations for Customizing the Email Application Pane for Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

## Salesforce for Outlook

Full product retirement for Salesforce for Outlook is rescheduled for June 2024. 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 Retirement Is Rescheduled for June 2024](#)

To continue support for active users, full product retirement for Salesforce for Outlook is rescheduled for June 2024. For the latest integration with Microsoft Outlook, we still recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture.

#### [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 Retirement Is Rescheduled for June 2024

To continue support for active users, full product retirement for Salesforce for Outlook is rescheduled for June 2024. For the latest integration with Microsoft Outlook, we still recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture.

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

**How:** When Salesforce for Outlook retires, it will no longer sync contacts, events, or tasks. Admins and users also lose access to Salesforce for Outlook features, such as the side panel.

The Outlook integration and Einstein Activity Capture replace Salesforce for Outlook features and deliver solutions in areas where Salesforce for Outlook falls short. We continue to introduce enhancements for these products every release.

### SEE ALSO:

[Outlook Integration](#)

[Einstein Activity Capture](#)

[Knowledge Article: Salesforce for Outlook Retirement \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products \(can be outdated or unavailable during release preview\)](#)

## Find Version-Specific Salesforce for Outlook Release Notes

Wondering about the updates available in each Salesforce for Outlook version? Find 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.

## Other Changes in the Sales Cloud

Unlimited and Performance Edition orgs can access several Sales Cloud features without purchasing add-on licenses.

### IN THIS SECTION:

[Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License](#)

To add more value to Sales Cloud in Unlimited and Performance Editions, we're now including more features and functionality that previously required an add-on license to help you grow. These features include High Velocity Sales (soon to be renamed to Sales Engagement), Inbox in Gmail and Outlook, Sales Cloud Einstein (not including Account Insights, Opportunity Insights, and Sales Analytics), Einstein Conversation Insights, and Einstein Activity capture.

## Sales Cloud Unlimited and Performance Editions Now Include Even More Features and Functionality Without an Add-On License

To add more value to Sales Cloud in Unlimited and Performance Editions, we're now including more features and functionality that previously required an add-on license to help you grow. These features include High Velocity Sales (soon to be renamed to Sales Engagement), Inbox in Gmail and Outlook, Sales Cloud Einstein (not including Account Insights, Opportunity Insights, and Sales Analytics), Einstein Conversation Insights, and Einstein Activity capture.

**Where:** This change applies to Sales Cloud in Lightning Experience in Unlimited and Performance Editions.



**How:** The features now included in Unlimited and Performance Editions aren't enabled automatically. In Setup, enable the specific features you want for your business.

SEE ALSO:

[High Velocity Sales Permissions Have Changed](#)

[Sales Cloud Unlimited and Performance Editions Now Include Einstein Conversation Insights Without an Add-On License](#)

[Sales Cloud Unlimited and Performance Editions Now Include Sales Cloud Einstein Without an Add-On License](#)

[Sales Cloud Unlimited and Performance Editions Now Include Inbox Without an Add-On License](#)

[Get Einstein Activity Capture in Performance and Unlimited Editions Without an Add-On License](#)

## Salesforce CDP (Customer Data Platform)

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Customer Data Platform, formerly Salesforce CDP, helps you connect and unify customer data across systems, power the connected and personalized marketing experiences that your customers expect, and analyze cross-channel engagement behavior. Activate loyalty, transaction, engagement attributes, and more from Customer Data Platform. Marketers can send additional customer profile information to marketing platforms, like Marketing Cloud Engagement, to enhance personalized communications. As a developer, you can use the CDP Python connector to leverage the power of Query API to extract data from Customer Data Platform into your environment.

IN THIS SECTION:

[Salesforce CDP Is Now Customer Data Platform](#)

The name change doesn't change the functionality of Customer Data Platform. You'll see the name Customer Data Platform begin to be updated within the product, documentation, Trailhead, and more later this year.

[Connect and Ingest](#)

Use the new Google Cloud Storage connector to retrieve data with more automation and fewer manual steps. Ingest custom attributes from the B2C Commerce product to package and deploy with data kits for use in other Customer Data Platform orgs.

[Model and Unify](#)

Easily review and activate relationships during mapping or from the record home for each DMO. Now you know when a ruleset job is queued and ready to run with new scheduled statuses.

[Segmentation and Activations](#)

Keep Marketing Cloud contacts separate when creating Customer Data Platform segments to use in marketing efforts. Use Related Profile Attributes to find relevant results for your marketing campaigns. Use API to build segments and share predefined segments.

[Build and Share](#)

Install or update Data Kits that power Salesforce CRM data bundles. Add Amazon S3 data streams to your data kits, extending data kit support beyond Salesforce CRM and B2C Commerce data streams.

[Development](#)

Use the improved navigation structure to find Customer Data Platform APIs. Review the new and changed Customer Data Platform APIs to enhance your amazing applications, integrations, and packages.

[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 CDP Is Now Customer Data Platform

The name change doesn't change the functionality of Customer Data Platform. You'll see the name Customer Data Platform begin to be updated within the product, documentation, Trailhead, and more later this year.

### Connect and Ingest

Use the new Google Cloud Storage connector to retrieve data with more automation and fewer manual steps. Ingest custom attributes from the B2C Commerce product to package and deploy with data kits for use in other Customer Data Platform orgs.

#### IN THIS SECTION:

##### [Save Time with Default Value Suggestions in Calculated Insights](#)

In Calculated Insights, measures and dimensions now support text value suggestions by default so you don't have to type in the values yourself. The automated default value suggestions help streamline your data setup. If a value doesn't appear, review the calculated values in Data Explorer.

##### [Ingest Data from More Sources with the Google Cloud Storage Connector](#)

It's now easier to ingest data from Google Cloud products such as Cloud Storage and Analytics 360 into Customer Data Platform to enrich your segments, unified profiles, and more. Use the new Google Cloud Storage (GCS) connector to retrieve data with more automation and fewer manual steps. Previously, retrieving this data required additional connectors and complex custom configurations.

##### [Use B2C Commerce Custom Product Attributes Across Customer Data Platform](#)

Custom attributes in B2C Commerce store a wealth of useful information for marketers. Ingest custom attributes from the B2C Commerce product entities stored in B2C Commerce in data streams. Use the custom attributes to create more refined segments and tailored analytics insights. Package and deploy custom attributes with data kits for use in other Customer Data Platform orgs.

##### [Send Data Actions to Multiple Salesforce CRM Orgs](#)

Now you can send data actions to multiple Salesforce CRM orgs connected to Customer Data Platform. Previously, you were limited to sending data actions to only one provisioned CRM org. New events and insights-generated data from Customer Data Platform flow to CRM orgs to provide you with near real-time insights.

### Save Time with Default Value Suggestions in Calculated Insights

In Calculated Insights, measures and dimensions now support text value suggestions by default so you don't have to type in the values yourself. The automated default value suggestions help streamline your data setup. If a value doesn't appear, review the calculated values in Data Explorer.

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

#### SEE ALSO:

[Salesforce Help: Ensure Accurate Calculated Insights with Key Qualifiers \(can be outdated or unavailable during release preview\)](#)

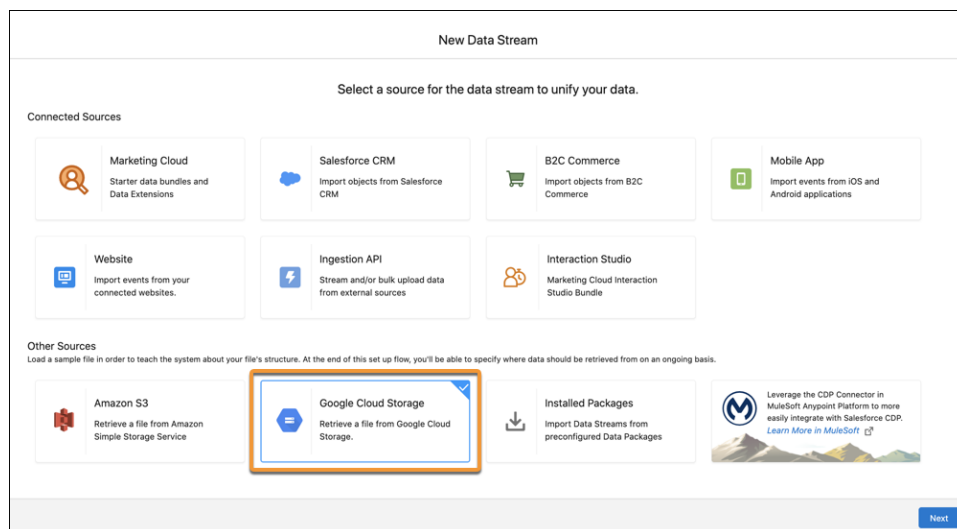
[Salesforce Help: Value Suggestion in Segments \(can be outdated or unavailable during release preview\)](#)

### Ingest Data from More Sources with the Google Cloud Storage Connector

It's now easier to ingest data from Google Cloud products such as Cloud Storage and Analytics 360 into Customer Data Platform to enrich your segments, unified profiles, and more. Use the new Google Cloud Storage (GCS) connector to retrieve data with more automation and fewer manual steps. Previously, retrieving this data required additional connectors and complex custom configurations.

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

**How:** Authenticate to a GCS account in CDP Setup. Then in Data Streams, select **Google Cloud Storage**. You need your GCS file and source details to ingest data.



SEE ALSO:

[Salesforce Help: Google Cloud Storage Connector \(can be outdated or unavailable during release preview\)](#)

## Use B2C Commerce Custom Product Attributes Across Customer Data Platform

Custom attributes in B2C Commerce store a wealth of useful information for marketers. Ingest custom attributes from the B2C Commerce product entities stored in B2C Commerce in data streams. Use the custom attributes to create more refined segments and tailored analytics insights. Package and deploy custom attributes with data kits for use in other Customer Data Platform orgs.

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

**Why:** For example, a retail customer stores color as a custom attribute in B2C Commerce. Using Tableau or other analytics tools, the marketer can determine black is the most popular color for items purchased. A marketer can segment on the color attribute to identify customers who bought black clothing during a specific time period and then target them with a promotion for black items.

SEE ALSO:

[Salesforce Help: B2C Commerce Connector \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: B2C Commerce Order Bundle Data Mappings \(can be outdated or unavailable during release preview\)](#)

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

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

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

[Trailhead: Salesforce CDP for Commerce: Quick Look](#)

## Send Data Actions to Multiple Salesforce CRM Orgs

Now you can send data actions to multiple Salesforce CRM orgs connected to Customer Data Platform. Previously, you were limited to sending data actions to only one provisioned CRM org. New events and insights-generated data from Customer Data Platform flow to CRM orgs to provide you with near real-time insights.

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

**How:** Go to CDP Setup and connect your Salesforce CRM as a data source and data action target. Go to Data Action Targets and click

**New.** Set the Action Target Type to Salesforce Platform Event, and then select a Salesforce CRM org.

SEE ALSO:

[Salesforce Help: Set Up Salesforce CRM Connection \(can be outdated or unavailable during release preview\)](#)

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

## Model and Unify

Easily review and activate relationships during mapping or from the record home for each DMO. Now you know when a ruleset job is queued and ready to run with new scheduled statuses.

IN THIS SECTION:

[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, because your first ruleset couldn't have a ruleset ID, you waited for Customer Data Platform to finish deleting the ruleset before creating another one. Now you can create up to two rulesets with different ruleset IDs without waiting, giving you even more flexibility in how you name unified objects.

[Get More Details About Recent Ruleset Jobs](#)

The status of each ruleset job tells you more about your identity resolution processing history. With the new Scheduled status, you know when a ruleset job is queued and ready to run. Previously, jobs that were In Progress status for a long time could cause confusion, but the new status provides more granular information for your peace of mind.

[Manage Data Model Object \(DMO\) Relationships](#)

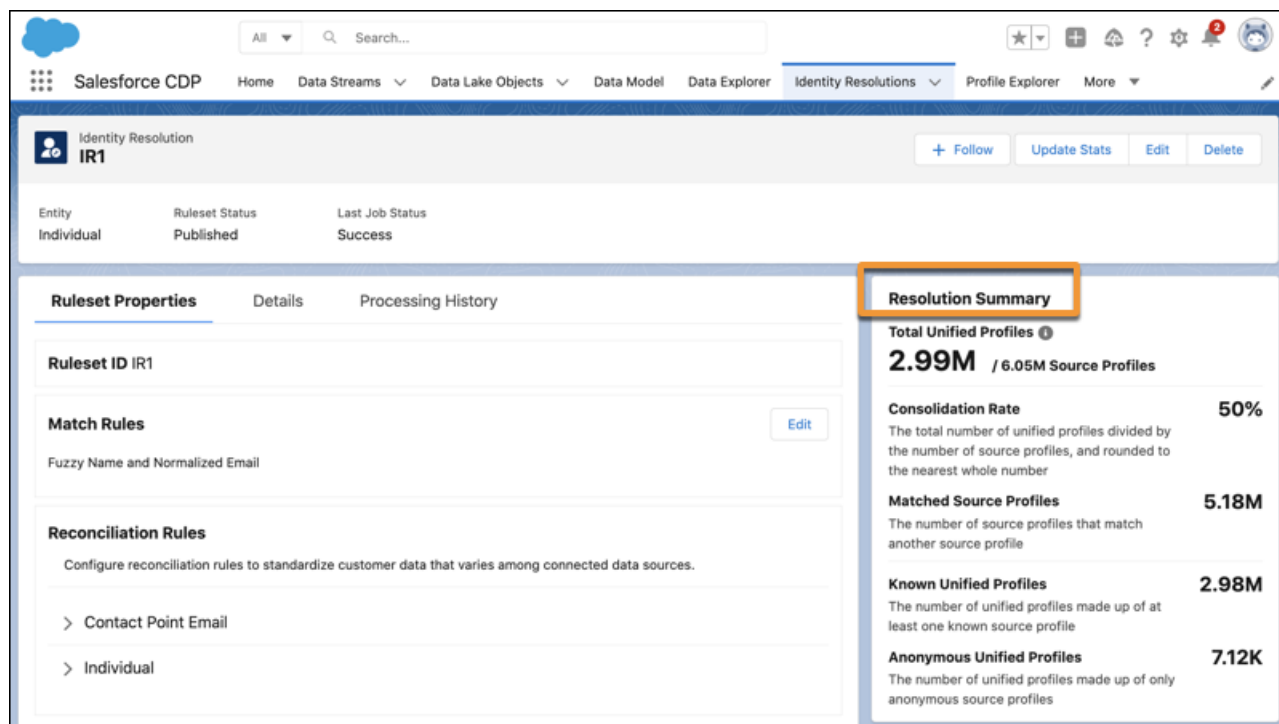
All DMOs now have additional relationship status details so users can easily review and activate relationships during mapping or from the record home for each DMO. Previously, you had to delete relationships, but now you simply change the relationship status without worrying about manually re-creating relationships later.

## 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.

**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](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Anonymous and Known Profiles in Identity Resolution](#) (can be outdated or unavailable during release preview)

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

## 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, because your first ruleset couldn't have a ruleset ID, you waited for Customer Data Platform to finish deleting the ruleset before creating another one. Now you can create up to two rulesets with different ruleset IDs without waiting, giving you even more flexibility in how you name unified objects.

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

SEE ALSO:

[Salesforce Help: Individual Entity Ruleset](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Unified Link Objects and Relationships to Unified Objects](#) (can be outdated or unavailable during release preview)

## Get More Details About Recent Ruleset Jobs

The status of each ruleset job tells you more about your identity resolution processing history. With the new Scheduled status, you know when a ruleset job is queued and ready to run. Previously, jobs that were In Progress status for a long time could cause confusion, but the new status provides more granular information for your peace of mind.

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

SEE ALSO:

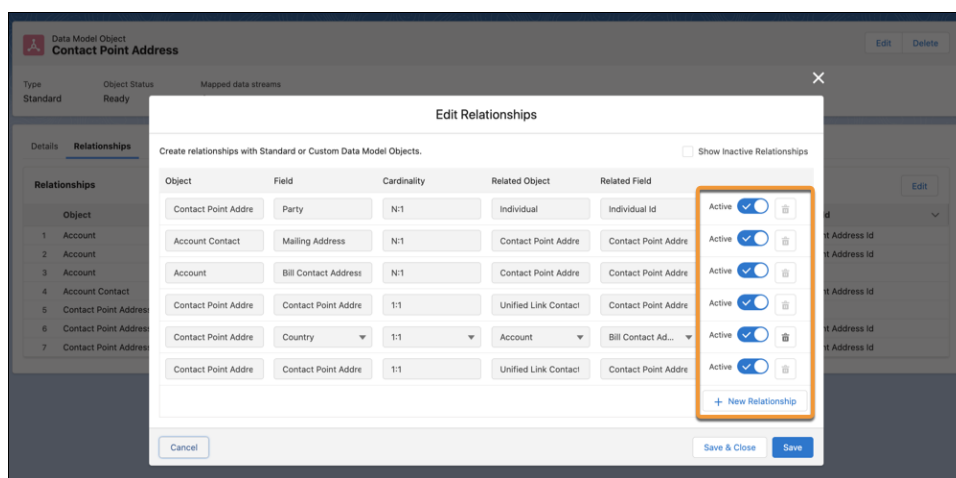
[Salesforce Help: Identity Resolution Summary \(can be outdated or unavailable during release preview\)](#)

## Manage Data Model Object (DMO) Relationships

All DMOs now have additional relationship status details so users can easily review and activate relationships during mapping or from the record home for each DMO. Previously, you had to delete relationships, but now you simply change the relationship status without worrying about manually re-creating relationships later.

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

**How:** In Relationships for a DMO, click **Edit**. View, edit, or activate relationships, and then save your changes.



SEE ALSO:

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

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

## Segmentation and Activations

Keep Marketing Cloud contacts separate when creating Customer Data Platform segments to use in marketing efforts. Use Related Profile Attributes to find relevant results for your marketing campaigns. Use API to build segments and share predefined segments.

IN THIS SECTION:

[Analyze Segment Membership Data](#)

Deliver an engaging and relevant marketing campaign by knowing who makes up your segment audience. Query the new segment membership data model object (DMO) using Tableau or SOQL to ensure that the membership is correct. Review who's part of the segment and which segments a profile belongs to.

### [Filter Segments with More Operators](#)

Narrow down your results using segment filters. The expanded set of operators now includes Matches/Doesn't Match and only Last Number of Years for Calculated Insights. Use these operators to find patterns in your attribute data.

### [Build Segments through APIs](#)

Create, update, read, and delete segments via APIs. Use this functionality to programmatically manage rule definitions, publish schedules, and more.

### [Share Predefined Segments with Other Salesforce Orgs](#)

Add predefined segment definitions as components to unmanaged or managed packages for distribution. Use this functionality to share commonly used segments across multiple orgs that you own or distribute them via AppExchange. With segment packaging, system integrators and independent software vendors can build predefined segments to support common use cases such as Churn Risk Customers segment or industry verticals such as HLS: Potential Transportation Assistance Patients segment.

### [Keep Business Unit Data Separate in Marketing Cloud and Customer Data Platform](#)

Marketing Cloud and Customer Data Platform users 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, you can keep contacts separate when creating segments to use in marketing efforts. Previously, because BU data wasn't separated when it was ingested 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.

### [Copy Activations for Easy Reuse in Segments](#)

Copy an activation to easily reuse filters or other selections across multiple segments and the same activation target. Whether you keep all or some configurations from your original activation, copying an activation saves time and gives you more flexibility to reuse work.

### [Personalize Your Activation Data Using Related Profile Attributes \(Beta\)](#)

Leverage cross-cloud customer data, such as recent activity, transactions, and promotions, to enrich your email through personalization of engagement-type data. Improve customer communication by using Related Profile Attributes to find relevant results for your marketing campaigns.

### [View All Your Attributes with the Improved Attribute Library](#)

The updated attribute library loads results faster and more efficiently and provides an improved search experience. The attribute library displays primary keys and foreign keys of DMOs by default.

## Analyze Segment Membership Data

Deliver an engaging and relevant marketing campaign by knowing who makes up your segment audience. Query the new segment membership data model object (DMO) using Tableau or SOQL to ensure that the membership is correct. Review who's part of the segment and which segments a profile belongs to.

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

SEE ALSO:

[Salesforce Help: View Your Data in Data Explorer \(can be outdated or unavailable during release preview\)](#)

## Filter Segments with More Operators

Narrow down your results using segment filters. The expanded set of operators now includes Matches/Doesn't Match and only Last Number of Years for Calculated Insights. Use these operators to find patterns in your attribute data.

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

SEE ALSO:

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

## Build Segments through APIs

Create, update, read, and delete segments via APIs. Use this functionality to programmatically manage rule definitions, publish schedules, and more.

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

**Why:** With Segment API, developers and partner developers get tools to create and manage segmentation from external systems and platforms. For example, you can configure a service to create segments for an upcoming cross-sell campaign so that the service continually updates segment filter rules to improve performance based on any closed-loop data that's collected. This feature provides a more robust integrations between Customer Data Platform and other Salesforce products, such as Tableau.

**How:** Use the new MarketSegmentDefinition metadata type to define segment filters. After the segment filter logic is defined, an entity ID is returned allowing you to create your market segment.

## Share Predefined Segments with Other Salesforce Orgs

Add predefined segment definitions as components to unmanaged or managed packages for distribution. Use this functionality to share commonly used segments across multiple orgs that you own or distribute them via AppExchange. With segment packaging, system integrators and independent software vendors can build predefined segments to support common use cases such as Churn Risk Customers segment or industry verticals such as HLS: Potential Transportation Assistance Patients segment.

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

**How:** In Salesforce CDP, click **Segments**, and then create the segment that you want to share or sell. In Package Manager, add the segments as components to an unmanaged or managed package. After upload, you can share a package via install URL or you can list it on AppExchange.


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

Marketing Cloud and Customer Data Platform users 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, you can keep contacts separate when creating segments to use in marketing efforts. Previously, because BU data wasn't separated when it was ingested 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.

**How:** Contact Salesforce Customer Support to enable Contacts to Business Unit Mapping in Marketing Cloud. Then in Customer Data Platform Setup, enable Allow Profile Business Unit Mapping Data. Filter segments by BU in Customer Data Platform and activate them to Marketing Cloud Data Extensions for their respective BUs.



 **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](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enable Contact to Business Unit Mapping](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Up Marketing Cloud Connection in Salesforce CDP](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Multiple Marketing Cloud Business Units in Segments](#) (can be outdated or unavailable during release preview)

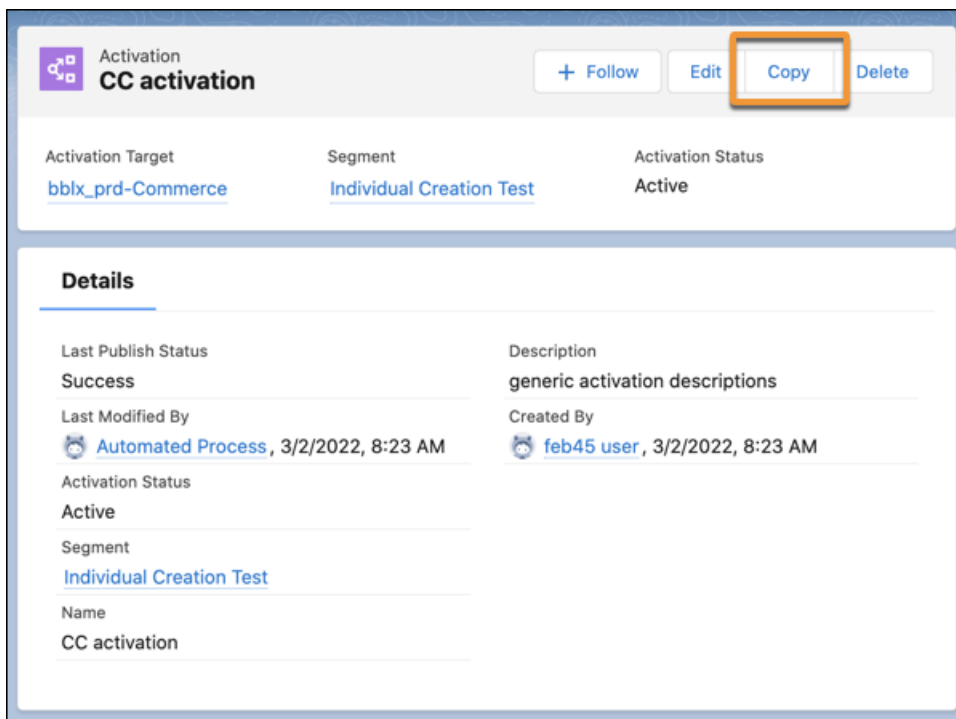
[Salesforce Help: Configure the Data Extension Entry Source with Customer Data Platform](#) (can be outdated or unavailable during release preview)

## Copy Activations for Easy Reuse in Segments

Copy an activation to easily reuse filters or other selections across multiple segments and the same activation target. Whether you keep all or some configurations from your original activation, copying an activation saves time and gives you more flexibility to reuse work.

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

**How:** From the record home for an activation or from the Activations list view, click **Copy**. Change included attributes or contact points, and then save your new activation.





**Activation**  
**CC activation**

[+ Follow](#) [Edit](#) [Copy](#) [Delete](#)

Activation Target	Segment	Activation Status
<a href="#">bblx_prd-Commerce</a>	<a href="#">Individual Creation Test</a>	Active

### Details

Last Publish Status	Description
Success	generic activation descriptions
Last Modified By	Created By
 Automated Process, 3/2/2022, 8:23 AM	 feb45 user, 3/2/2022, 8:23 AM
Activation Status	
Active	
Segment	
<a href="#">Individual Creation Test</a>	
Name	
CC activation	

#### SEE ALSO:

[Salesforce Help: Copy an Activation](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Activation for a Segment](#) (can be outdated or unavailable during release preview)

## Personalize Your Activation Data Using Related Profile Attributes (Beta)

Leverage cross-cloud customer data, such as recent activity, transactions, and promotions, to enrich your email through personalization of engagement-type data. Improve customer communication by using Related Profile Attributes to find relevant results for your marketing campaigns.

**Where:** This change applies to Lightning Experience in all editions. This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at [Agreements and Terms](#).

**How:** Navigate to Segments and select a segment. Under Activations, click **New**. Select the activation target and contact points, and click **Next**. Click **Add Attributes** and drag related attributes to the canvas.

SEE ALSO:

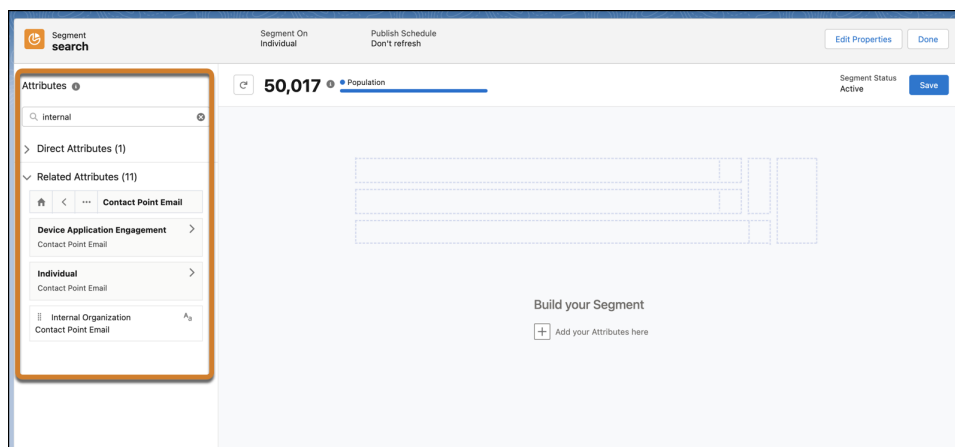
[Salesforce Help: Segment Your Data with Attributes \(can be outdated or unavailable during release preview\)](#)

## View All Your Attributes with the Improved Attribute Library

The updated attribute library loads results faster and more efficiently and provides an improved search experience. The attribute library displays primary keys and foreign keys of DMOs by default.

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

**How:** In the attribute library, search for direct and related attributes where it's nested under their associated data model object (DMO). Drag and drop an attribute to the segment canvas interface.



SEE ALSO:

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

[Salesforce Help: Key Qualifiers in Segments \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Ensure Accurate Calculated Insights with Key Qualifiers \(can be outdated or unavailable during release preview\)](#)

## Build and Share

Install or update Data Kits that power Salesforce CRM data bundles. Add Amazon S3 data streams to your data kits, extending data kit support beyond Salesforce CRM and B2C Commerce data streams.

### IN THIS SECTION:

#### [Deploy Amazon S3 Data Streams from Data Kits](#)

Save time and effort by deploying a single data kit with everything you need instead of installing and managing multiple packages. Now you can add Amazon S3 data streams to your data kits, extending data kit support beyond Salesforce CRM and B2C Commerce data streams. Previously, you could add an Amazon S3 data stream directly to a package, but now you can combine these data streams with other data kit functionality such as calculated insights.

#### [Install or Update Data Kits That Power Standard Data Bundles](#)

Salesforce CRM data bundles are now powered by data kits to enable more scalable delivery and faster innovation for Salesforce CRM data bundles. As a Customer Data Platform Admin, you can install or update data kits that power Salesforce CRM data bundles.

#### [Add Calculated Insights to Data Kits for Easy Reuse](#)

Data kits let you quickly package and reuse functionality to save time and reduce manual rework. Now you can add calculated insights to data kits alongside data streams and data models in CDP Setup. For example, add a calculated insight to a data kit from one org for testing and then install it in another org for use in production.

#### [Add More Measures to Calculated Insights](#)

Now you can add more measures to your calculated insights to achieve an improved result. The max number of measures per calculated insight has increased from 5 to 20.

#### [View Calculated Insights in Builder](#)

Now it's easier to review the objects, filters, relationships, and logic that you selected for a Calculated Insight. When you use the Insight Builder to create a Calculated Insight, you can view insight logic in the builder and in SQL.

#### [Package and Deploy Ingestion API Data Streams for Easy Reuse](#)

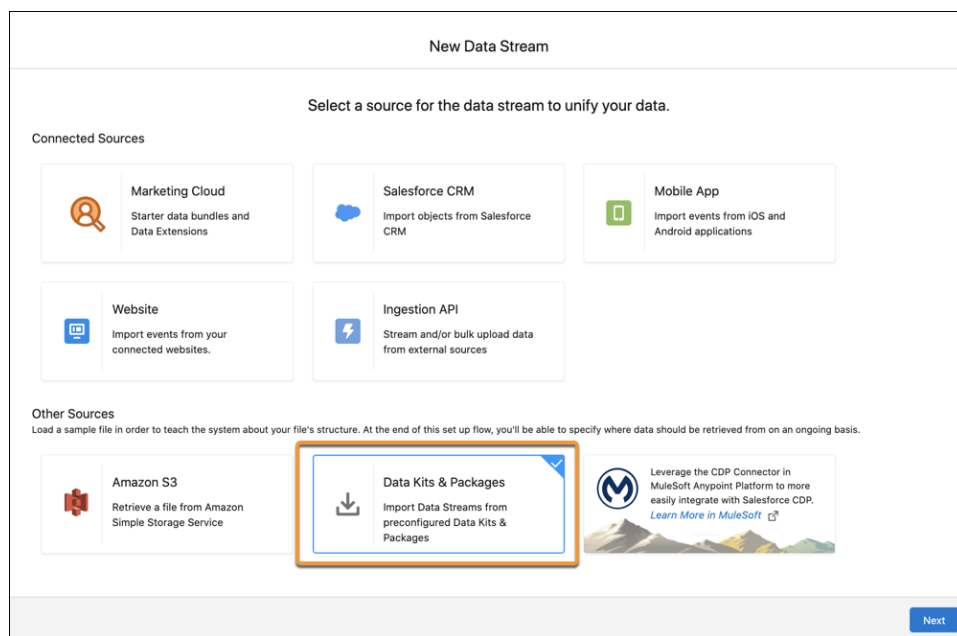
The Ingestion API helps you bring source data into Customer Data Platform from wherever you store it, whether in a data warehouse or other external system. Now you can package and deploy Ingestion API data streams for use in other Customer Data Platform orgs. Packaging ensures your configurations stay 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.

## Deploy Amazon S3 Data Streams from Data Kits

Save time and effort by deploying a single data kit with everything you need instead of installing and managing multiple packages. Now you can add Amazon S3 data streams to your data kits, extending data kit support beyond Salesforce CRM and B2C Commerce data streams. Previously, you could add an Amazon S3 data stream directly to a package, but now you can combine these data streams with other data kit functionality such as calculated insights.

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

**How:** Create a data kit in CDP Setup that includes Amazon S3 data streams. After publishing and installing your data kit, click **Data Kits & Packages**, and then create data streams for everything in your data kit.



## SEE ALSO:

[Salesforce Help: Deploy a Data Stream from a Data Kit \(can be outdated or unavailable during release preview\)](#)

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

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

[Salesforce Help: Create a Data Kit \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)

## Install or Update Data Kits That Power Standard Data Bundles

Salesforce CRM data bundles are now powered by data kits to enable more scalable delivery and faster innovation for Salesforce CRM data bundles. As a Customer Data Platform Admin, you can install or update data kits that power Salesforce CRM data bundles.

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

## SEE ALSO:

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

## Add Calculated Insights to Data Kits for Easy Reuse

Data kits let you quickly package and reuse functionality to save time and reduce manual rework. Now you can add calculated insights to data kits alongside data streams and data models in CDP Setup. For example, add a calculated insight to a data kit from one org for testing and then install it in another org for use in production.

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

**How:** From CDP Setup, click **Data Kits**, and then select a data kit. Add calculated insights, and then click **Publish**.

The screenshot shows the Salesforce CDP Setup interface. The left sidebar contains navigation options: CDP Setup, Home, Object Manager, and a search bar. The main content area displays the 'Data Kits' section for 'Jitin Test'. It includes a table with columns: Description, Created By, Created Date, and Last Modified Date. Below this, the 'Data Kit Contents' are listed: Data Streams (1), Data Models (9), and Calculated Insights (3). The 'Calculated Insights' section is highlighted with an orange box. It contains a table with columns: Name and Included By. The table lists three insights: Average Net Worth Unified Ind, sample\_streaming\_cio\_11, and streaming ci test.

Description	Created By	Created Date	Last Modified Date
Jitin Test	Admin User	3/2/2022, 04:28 PM	3/2/2022, 04:34 PM

**Data Kit Contents**

**Data Streams (1)**

Name	Type	Connector
CRM1Jitin	Bundle	Salesforce CRM

**Data Models (9)**

Name	Included By
Account	Account
Account Contact	Contact
Case	Case
Contact Point Address	Account, Lead, Contact
Contact Point Email	Lead, Contact
Contact Point Phone	Account, Lead, Contact
Individual	Lead, Contact
Lead	Lead
LoyaltyCustom	

**Calculated Insights (3)**

Name
Average Net Worth Unified Ind
sample_streaming_cio_11
streaming ci test

## SEE ALSO:

- [Salesforce Help: Data Kits \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Create a Data Kit \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Publish a Data Kit \(can be outdated or unavailable during release preview\)](#)
- [Salesforce Help: Calculated Insights \(can be outdated or unavailable during release preview\)](#)

## Add More Measures to Calculated Insights

Now you can add more measures to your calculated insights to achieve an improved result. The max number of measures per calculated insight has increased from 5 to 20.

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

## View Calculated Insights in Builder

Now it's easier to review the objects, filters, relationships, and logic that you selected for a Calculated Insight. When you use the Insight Builder to create a Calculated Insight, you can view insight logic in the builder and in SQL.

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

**How:** From Customer Data Platform, click **Calculated Insights**, and then click **Show In Builder**.

## 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.

### SEE ALSO:

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

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

[Salesforce Help: Create and Install Your Package \(can be outdated or unavailable during release preview\)](#)

## Development

Use the improved navigation structure to find Customer Data Platform APIs. Review the new and changed Customer Data Platform APIs to enhance your amazing applications, integrations, and packages.

### IN THIS SECTION:

[Navigate the Customer Data Platform Developer Journey](#)

Find Customer Data Platform APIs by using the improved navigation structure.

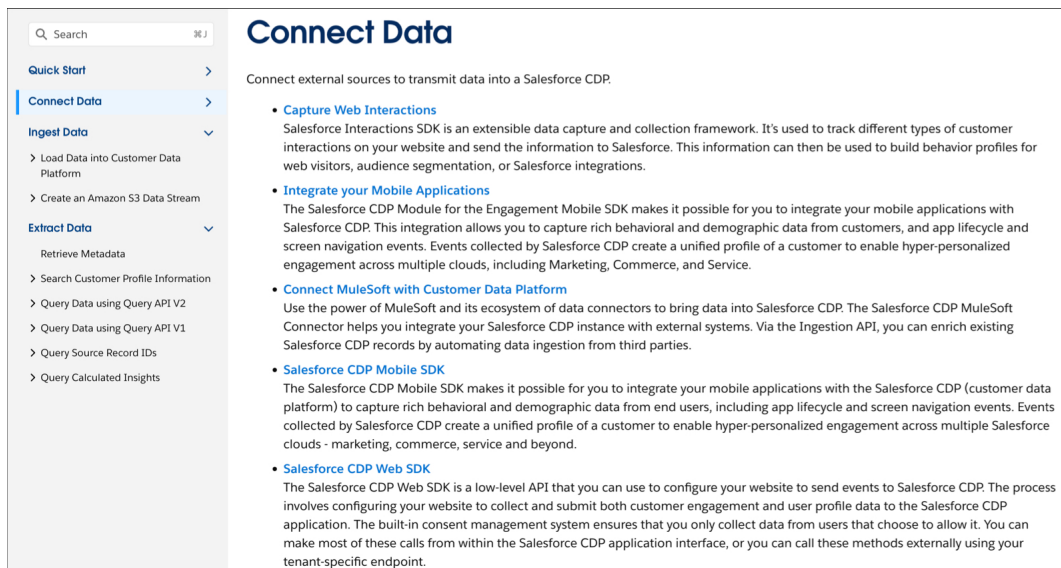
[Customer Data Platform API: New and Changed Items](#)

Find new and changed REST API calls, metadata objects, and more for Customer Data Platform API.

## Navigate the Customer Data Platform Developer Journey

Find Customer Data Platform APIs by using the improved navigation structure.

**How:** To see the restructured navigation, visit the [Customer Data Platform Developer Guide](#).



## Customer Data Platform API: New and Changed Items

Find new and changed REST API calls, metadata objects, and more for Customer Data Platform API.

Metadata API New and Changed Objects

### Package web and mobile apps

Use the new StreamingAppDataConnector metadata type.

### Specify the datastream that a user adds to a datakit

Use the new DataStreamTemplate metadata type. Introduced in API version 53.0, this type has been added to the *Metadata API Developer Guide*.

Tooling API New and Changed Objects

### Retrieve metadata when creating Activation Platform packages to publish on AppExchange

Use the new ActivationPlatform object. Introduced in API version 54.0, this object has been added to the *Tooling API Developer Guide*.

## 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 Flow

Salesforce is continuing its investment in Flow by launching new capabilities that make it easier to get work done, while seamlessly delivering experiences that engage customers. With that in mind, Einstein Automate is now Salesforce Flow. Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration. Build and deliver personalized recommendations with Einstein Next Best Action.

## IN THIS SECTION:

### [Flow Integration](#)

MuleSoft Composer for Salesforce is now Flow Integration. Flow Integration makes it easy to integrate data from any system with clicks, and invoke processes in any flow. 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 business.

### [OmniStudio](#)

OmniStudio makes it easy to create consumer-grade, guided interactions that integrate into any industry-specific process.

### [Flow Builder](#)

Use formulas in flow entry conditions. Make Apex-defined invocable actions stand out in Flow Builder with custom icons. Organize screens with the new section component. Drag record-triggered flows into your preferred sequence in Flow Trigger Explorer. Create, save, and run tests for flows in Flow Builder. Migrate more workflow rules to flow with the Migrate to Flow tool.

### [Flow Orchestration](#)

Orchestrator is now Flow Orchestration. Open associated flows in Flow Builder from within an orchestration. Make testing easier with orchestration history milestones. Wake up paused orchestrations with the orchestration system variable. Order your record-triggered orchestrations with Flow Trigger Explorer.

### [Einstein Next Best Action](#)

Use Limit Repetitions to limit the number of times the same recommendation or offer appears on the same record or for the same user.

## Flow Integration

MuleSoft Composer for Salesforce is now Flow Integration. Flow Integration makes it easy to integrate data from any system with clicks, and invoke processes in any flow. 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 business.

**Where:** Flow Integration for Salesforce is available for an extra cost in Enterprise, Performance, and Unlimited editions that have enabled Lightning Experience.

For Composer release notes and help, see [MuleSoft Composer for Salesforce](#).

## OmniStudio

OmniStudio makes it easy to create consumer-grade, guided interactions that integrate into any industry-specific process.

**Where:** OmniStudio is available for an extra cost in Enterprise, Performance, and Unlimited editions and works with Lightning Experience, Experience Builder sites, and all versions of the mobile app.

**How:** For OmniStudio release notes, see [OmniStudio](#). For OmniStudio details and pricing, contact your Salesforce account executive.

### Standard OmniStudio Runtime

For customers on the standard objects model, use the standard FlexCards and OmniScripts components in the Lightning App Builder and Aura-based Experience Builder to run FlexCards and OmniScripts natively in Salesforce. Any updates to the standard components follow the Salesforce patch schedule so it's not necessary to install patch packages to get updates. Custom generated FlexCard and OmniScript components continue to run from your pre-existing managed package.

### OmniStudio Migration Tool

Migrate from OmniStudio custom objects model (OmniStudio for Vlocity) to standard objects model (OmniStudio) to take advantage of OmniStudio enhancements only available with standard objects. Prepare your org metadata ahead of time and switch between custom and standard objects to test and rollback to custom objects if there are any issues. View a log of migration errors. Existing



activated FlexCards, Integration Procedures, and OmniScripts will continue to work after migration so that there's no disruption to your production org. Only active FlexCards, Integration Procedures, and OmniScripts are migrated.

### FlexCards

Available for customers on the standard objects model (OmniStudio) and the custom objects model (OmniStudio for Vlocity). With enhanced accessibility support, use your mouse and keyboard to open or close a menu and move through menu items.

Available for customers on the standard objects model. Enable Lightning Web Security to ensure a chart element displays at the expected height in a standard FlexCard component.

## Flow Builder

Use formulas in flow entry conditions. Make Apex-defined invocable actions stand out in Flow Builder with custom icons. Organize screens with the new section component. Drag record-triggered flows into your preferred sequence in Flow Trigger Explorer. Create, save, and run tests for flows in Flow Builder. Migrate more workflow rules to flow with the Migrate to Flow tool.

### IN THIS SECTION:

#### [Flow Builder Updates](#)

Use formulas as your flow entry condition requirements. Make Apex-defined invocable actions stand out with custom icons. Give flow screens a visual hierarchy with section headers. Find connected elements in your flow with Go To connector improvements. Add Name and Address record fields directly onto your flow screens (beta).

#### [Flow Trigger Explorer](#)

Drag record-triggered flows into your preferred run sequence in Flow Trigger Explorer. Jump into Flow Trigger Explorer from Object Manager. Use keyboard shortcuts to navigate through and reorder flows.

#### [Flow Testing and Debugging](#)

Create, save, and run tests for your flows in Flow Builder.

#### [Flow Runtime](#)

Update flow screens to use Section components to prepare for the replacement of two-column layouts with multicolumn screens. The Dependent Picklists component is rebuilt using Lightning Web Components. 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 55.0.

#### [Flow and Process Management](#)

Convert more workflow rules to flows with the Migrate to Flow tool, now generally available. Delete a flow or process version from a managed package.

#### [Flow Extensions](#)

Enable your users to launch screen flows from Slack. Send custom notifications for Slack.

#### [Flow and Process Release Updates](#)

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

## Flow Builder Updates

Use formulas as your flow entry condition requirements. Make Apex-defined invocable actions stand out with custom icons. Give flow screens a visual hierarchy with section headers. Find connected elements in your flow with Go To connector improvements. Add Name and Address record fields directly onto your flow screens (beta).

**IN THIS SECTION:**[Use Formulas as Flow Entry Conditions](#)

A formula builder is now available in the Start element of a record-triggered flow. The builder guides you through the syntax and simplifies the process. Instead of waiting until you save a flow, you can check the formula syntax and catch errors as you work.

[Add Custom Icons to Apex-Defined Invocable Actions](#)

Make your Apex-defined invocable actions stand out on the Flow Builder canvas with custom icons.

[Add Section Headers to Flow Screens](#)

Use section headers to create a visual hierarchy to guide your users to the most important items on a screen. Sections with headers are collapsible and always open by default to make screen flow completion more efficient.

[Find Connected Flow Elements Faster with Go To Connector Enhancements](#)

Now you can easily find connected elements in your flow with new highlighting and canvas adjustment improvements to Go To connectors.

[Place Name and Address Record Fields Directly on Flow Screens \(Beta\)](#)

Create screen flows faster with record fields of the Name and Address data types. Autocomplete is available in Address record fields. When you add a record field to a flow screen, the name, data type, help text, requiredness, and, in some cases, existing values are automatically configured.

[Screen Editor Accessibility Improvements in Flow Builder](#)

Focus and screen reader enhancements make creating screen flows using a screen reader easier. After certain actions, the focus is automatically set to make the next action faster. Also, screen readers are now able to read labels associated with screen record fields and unnamed components.

[Get Better Performance with Custom Labels](#)

In orgs with custom labels, opening and working in a flow is faster with Flow Builder improvements. If a flow references a `$Label` global variable, Flow Builder performance is improved after the flow is opened.

## Use Formulas as Flow Entry Conditions

A formula builder is now available in the Start element of a record-triggered flow. The builder guides you through the syntax and simplifies the process. Instead of waiting until you save a flow, you can check the formula syntax and catch errors as you work.

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

**When:** This functionality is available on a rolling basis starting in the Summer '22 release.

**How:** Configure the Start element in a record-triggered flow. In the **Set Entry Conditions** section, set **Condition Requirements** to **Formula Evaluates to True (New)**. Insert a resource and a function and select an operator. Click **Check Syntax** after you build each expression because the formula builder shows one error at a time.

**Set Entry Conditions**

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Formula Evaluates to True (New) New Formulas for Conditions ⓘ

Formula

Insert a resource...  All Functions  Insert a function...  Select an Operator...

[Check Syntax](#)

SEE ALSO:

[Salesforce Help: Create Formulas with Flow Formula Builder \(can be outdated or unavailable during release preview\)](#)

## Add Custom Icons to Apex-Defined Invocable Actions

Make your Apex-defined invocable actions stand out on the Flow Builder canvas with custom icons.

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

**How:** Upload a valid SVG file as a static resource or select a standard Salesforce Lightning Design System (SLDS) icon. Then set the value of the `iconName` attribute of the `InvocableMethod` annotation. When a user adds the invocable action in Flow Builder, the custom icon appears on the Flow Builder canvas to represent it.

SEE ALSO:

[Salesforce Help: Add a Custom Icon to an Apex-Defined Action \(can be outdated or unavailable during release preview\)](#)

## Add Section Headers to Flow Screens

Use section headers to create a visual hierarchy to guide your users to the most important items on a screen. Sections with headers are collapsible and always open by default to make screen flow completion more efficient.

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

**How:** In a Screen element, add a Section component.

**Edit Screen**

Components Fields (Beta)

Search components...

Input (25)

- Address
- Assign Segment to Promo...
- Call Script
- Checkbox
- Checkbox Group
- Currency
- Date
- Date & Time
- Dependent Picklists
- Display Image
- Email
- File Upload
- Long Text Area
- Lookup

Get more on the AppExchange

**New Hire Setup**

Section

Job Details

Title

Status ☐ Permanent ☐ Temporary

Compensation Type ☐ Hourly ☐ Salary

Department

Hours ☐ Full Time ☐ Part Time

Annual Salary

Hourly Wage

Workstation

Workstation Type ☐ In Office ☐ Remote

Computer ☐ Not Needed ☐ Desk ☐ Not Needed ☐

Computer Type ☐ Laptop ☐ Standing

Section

☒ Include Header

Label  Job Details

API Name  Job\_Details

Configure Columns

Column 1 Width  4 of 12

Column 2 Width  4 of 12

Column 3 Width  4 of 12

[Add Column](#)

Set Component Visibility

[Cancel](#) [Done](#)

Select **Include Header** (1) and enter the header label (2).

SEE ALSO:

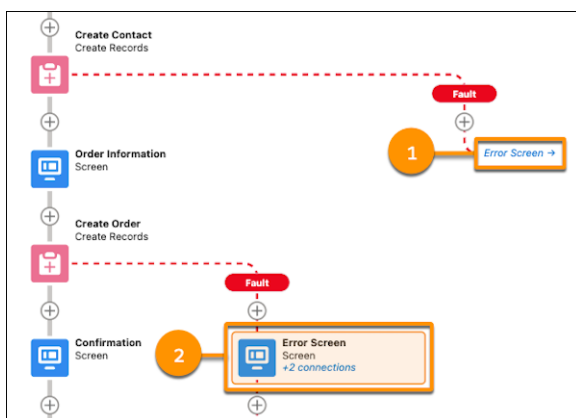
[Salesforce Help: Flow Screen Output Component: Section \(can be outdated or unavailable during release preview\)](#)

## Find Connected Flow Elements Faster with Go To Connector Enhancements

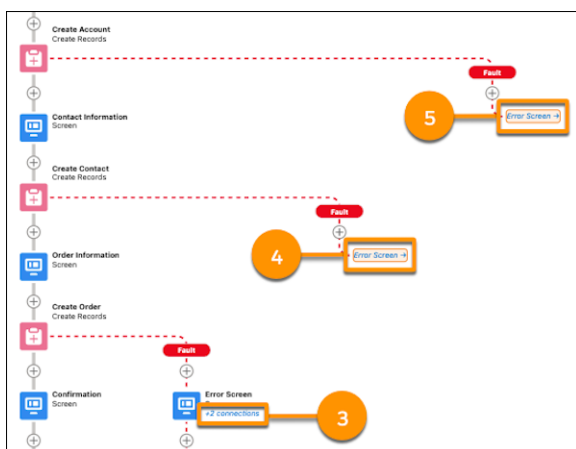
Now you can easily find connected elements in your flow with new highlighting and canvas adjustment improvements to Go To connectors.

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

**How:** To find an outbound connected element, click the Go To connector element name. To find all inbound connections for an element, click **connections**.



For example, to find the outbound connected element for the first fault path, click the **Error Screen** (1) Go To connector. The outbound connected destination element is highlighted (2) and centered on the canvas.



To find all inbound connections for the Error Screen element, click **connections** (3). All inbound linked connectors are highlighted (4)(5), and the canvas adjusts to show all Go To connectors and the destination element.

SEE ALSO:

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

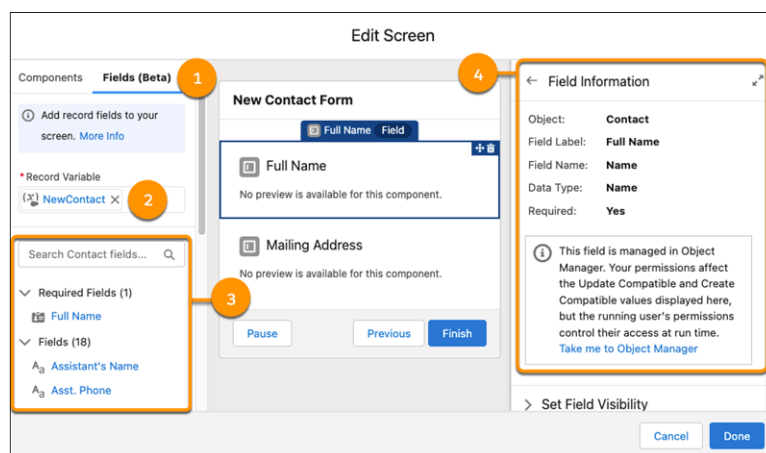
## Place Name and Address Record Fields Directly on Flow Screens (Beta)

Create screen flows faster with record fields of the Name and Address data types. Autocomplete is available in Address record fields. When you add a record field to a flow screen, the name, data type, help text, requiredness, and, in some cases, existing values are automatically configured.

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

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

**How:** Record fields (beta) uses record variables to determine which fields can be placed on a flow screen and their configuration. You can use a record variable automatically created by a Get Records element or a manually created record variable. If you don't have a record variable with the desired field's object in your flow, create a variable with a Record data type and choose the desired object.



From the Fields (Beta) tab (1), select the record variable (2). Drag a field from the list of fields (3) to the screen editor canvas. The field's details appear in the properties pane (4).

SEE ALSO:


[Salesforce Help: Place Record Fields Directly on Flow Screens \(Beta\)](#) (can be outdated or unavailable during release preview)

## Screen Editor Accessibility Improvements in Flow Builder

Focus and screen reader enhancements make creating screen flows using a screen reader easier. After certain actions, the focus is automatically set to make the next action faster. Also, screen readers are now able to read labels associated with screen record fields and unnamed components.

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

**How:** These focus enhancements improve accessibility.

- When you open a new screen element, focus is set to the screen element's label field in the screen properties pane.
- When you open an existing screen element, focus is set to the  for the screen element in the screen properties pane.
- After you create a component visibility condition in a screen component, focus is set to the condition you created.
- After you create a choice resource from a value field, focus is set back to the value field where you created the choice.

## Get Better Performance with Custom Labels

In orgs with custom labels, opening and working in a flow is faster with Flow Builder improvements. If a flow references a `$Label` global variable, Flow Builder performance is improved after the flow is opened.

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

SEE ALSO:

[Salesforce Help: Flow Resource: Global Variables \(can be outdated or unavailable during release preview\)](#)

## Flow Trigger Explorer

Drag record-triggered flows into your preferred run sequence in Flow Trigger Explorer. Jump into Flow Trigger Explorer from Object Manager. Use keyboard shortcuts to navigate through and reorder flows.

IN THIS SECTION:

[Manage the Run Order of Record-Triggered Flows from Flow Trigger Explorer](#)

Easily change the run order of record-triggered flows by dragging them into place. Flow Trigger Explorer lets you manage the run order of record-triggered flows without opening and editing individual flows.

[Create Relevant Flows from Flow Trigger Explorer](#)

Speed up the creation of flows. Create flows in Flow Trigger Explorer with pre-filled settings based on the category and context that you create them from.

[Access Flow Trigger Explorer from Object Manager](#)

Now you can access Flow Trigger Explorer right from Object Manager and quickly manage your record-triggered flows.

[Navigate Flow Trigger Explorer with Keyboard Shortcuts](#)

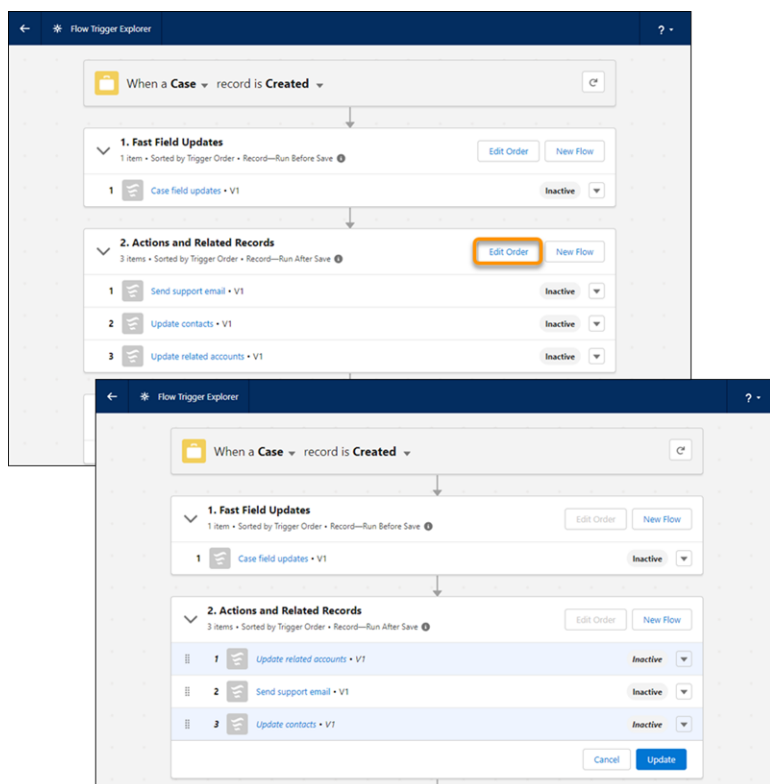
Use new accessibility options to navigate and reorder flows in Flow Trigger Explorer with your keyboard.

## Manage the Run Order of Record-Triggered Flows from Flow Trigger Explorer

Easily change the run order of record-triggered flows by dragging them into place. Flow Trigger Explorer lets you manage the run order of record-triggered flows without opening and editing individual flows.

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

**How:** In Flow Trigger Explorer, click **Edit Order** and drag flows into the order you want them to run.



Changing the run order of flows in Flow Trigger explorer changes the flow's Trigger Order value. The Trigger Order value determines the flow run sequence for an object's flows with the same trigger type.

## Create Relevant Flows from Flow Trigger Explorer

Speed up the creation of flows. Create flows in Flow Trigger Explorer with pre-filled settings based on the category and context that you create them from.

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

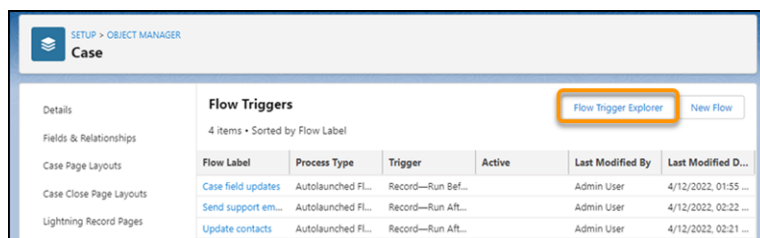
**How:** In Flow Trigger Explorer, click **New Flow** to create a flow with the same object, record trigger type, and trigger type automatically entered, bypassing the default new flow process. This action lets you quickly create flows with similar start criteria.

## Access Flow Trigger Explorer from Object Manager

Now you can access Flow Trigger Explorer right from Object Manager and quickly manage your record-triggered flows.

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

**How:** To access Flow Trigger Explorer, on an object's Flow Triggers page, click **Flow Trigger Explorer**. From there, you can manage the object's record-triggered flows.



## Navigate Flow Trigger Explorer with Keyboard Shortcuts

Use new accessibility options to navigate and reorder flows in Flow Trigger Explorer with your keyboard.

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

**How:** For navigating Flow Trigger Explorer, these keyboard shortcuts were added.

Action	Keyboard Shortcut
Switch section focus	F6, Shift+F6 (backwards)

For reordering flows, these keyboard shortcuts were added.

Action	Keyboard Shortcut
Select flow	Spacebar
Drop flow	Spacebar
Move flow	Arrow keys
Cancel reordering	Esc

## Flow Testing and Debugging

Create, save, and run tests for your flows in Flow Builder.

### IN THIS SECTION:

#### [Test One, Two, Three, Flow \(Beta\)](#)

Before you activate a record-triggered flow, you can now test it to quickly verify its expected results and identify flow run-time failures. In Flow Builder, you create, save, and run flow tests. Previously, you debugged a flow manually to troubleshoot failures each time they occurred. Now, you create and save a flow test from a debug run. Then each time you modify the flow, you can run the test. You can test only a flow path that runs immediately. Flow tests don't support flows that run when a record is deleted.

#### [View All Data Permissions for Debugging Triggered Flows](#)

In Summer '22, only users with View All Data permissions enabled can debug record- and schedule-triggered flows. Previously, users without the View All Data permissions could debug triggered flows.



## Test One, Two, Three, Flow (Beta)

Before you activate a record-triggered flow, you can now test it to quickly verify its expected results and identify flow run-time failures. In Flow Builder, you create, save, and run flow tests. Previously, you debugged a flow manually to troubleshoot failures each time they occurred. Now, you create and save a flow test from a debug run. Then each time you modify the flow, you can run the test. You can test only a flow path that runs immediately. Flow tests don't support flows that run when a record is deleted.

**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](#).

**Who:** To view test run details, you need the View All Data permission. You can view test results and run tests without the View All Data permission.

**Why:** Automated testing for flows saves you time and improves the flow's reliability because the test automates the process of determining whether the flow runs as expected. When you debug a flow, you manually configure the debug parameters and inputs each time you start to debug. With a flow test, you configure the test parameters and inputs one time. Each time you run the test, it uses the same configuration to evaluate the flow. By the way, you're not stuck with the same test per flow. You can edit the test or create more tests for different scenarios. We recommend that you create a test for every path that the flow can take.

For example, this test verifies the flow when an account is updated and the flow takes the path that runs immediately. A flow test requires a flow path to run immediately.

The test includes fields to set the initial and updated values for the triggering record, which is the same record that triggers the flow to run. The test creates a copy of the record to use only for the test. The record isn't saved to the database.

The test evaluates each assertion to verify that the flow runs as expected. A test can only evaluate whether a flow element was executed and whether flow resource values are set as expected.

When a flow includes tests, the Tests list view shows all tests for a flow and associated test results.

							Create
<input type="checkbox"/>	Test La...	Descrip...	Create...	Last M...	Last Ru...	Result	
<input type="checkbox"/>	Test Two		Maria Lee	04/20/2022,...	04/20/2022,...	✖ Fail	▼
<input type="checkbox"/>	Test One		Maria Lee	04/20/2022,...	04/20/2022,...	✔ Pass	▼

After a test is run, Test Run Details shows how each assertion was evaluated. If a condition evaluates to false, the assertion and test fail. If all assertions pass, the test passes.

Flow Builder | Flow for Test Example - V1 | Test (Beta)- Test Example | Passed

Record-Triggered Flow Start

Run Immediately

Set Industry Assignment

End

Test Run Details

Assertions | All Details

Assertion 1 Passed

Condition

(!Set\_Industry) Was visited true

Condition evaluation

(!Set\_Industry) (null) Was visited true

Assertion 2 Passed

Condition

(!\$Record.Industry) Equals Other

Condition evaluation

(!\$Record.Industry) (Other) Equals Other

All Details shows the results for the entire test run. Assertions are evaluated at the end of the test run.

Test Run Details	
Assertions	All Details
>	How the Interview Started
>	Start Condition Requirements
>	Assignment: Set Industry
>	Assertion 1 <span>Passed</span>
>	Assertion 2 <span>Passed</span>

Flow tests have these beta limitations and considerations.

- The maximum number of tests per flow is 200.
- Flow tests are available only for record-triggered flows.
- Flow tests support only flow paths that run immediately.
- Packaging and change sets aren't supported for flow tests.
- The owner of the triggering record in a flow test changes to the last person who edits the test.

**How:** To create a flow test, open a record-triggered flow, and click **View Tests (Beta)**, and then click **Create**. To create a test from a debug run, click **Convert to Test**. To run, edit, or delete a test, from the Tests list view, click the test's dropdown menu, and then select an action.

## View All Data Permissions for Debugging Triggered Flows

In Summer '22, only users with View All Data permissions enabled can debug record- and schedule-triggered flows. Previously, users without the View All Data permissions could debug triggered flows.

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

## Flow Runtime

Update flow screens to use Section components to prepare for the replacement of two-column layouts with multicolumn screens. The Dependent Picklists component is rebuilt using Lightning Web Components. 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 55.0.

### IN THIS SECTION:

#### [Two-Column Flow Layouts Are Superseded by Multicolumn Screens](#)

Starting in Winter '23, two-column layouts are ignored. But your data isn't affected, and a better layout option is available. With the Section component, you can organize record fields and screen components in up to four columns directly in the screen. To prepare for this change, we recommend that you update your flow screens to use Section components.

#### [Dependent Picklists Component Is Rebuilt Using Lightning Web Components \(LWC\)](#)

The Dependent Picklists component is now easier for Salesforce to support in all places that run screen flows. With a couple exceptions, the component looks and behaves the same as in earlier releases.

#### [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 Changes in API Version 55.0](#)

These updates affect only flows and processes that are configured to run on API version 55.0 or later.

## Two-Column Flow Layouts Are Superseded by Multicolumn Screens

Starting in Winter '23, two-column layouts are ignored. But your data isn't affected, and a better layout option is available. With the Section component, you can organize record fields and screen components in up to four columns directly in the screen. To prepare for this change, we recommend that you update your flow screens to use Section components.

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

**Why:** Section components provide 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.
- You can add section headers to provide context and let users collapse and expand each section.
- 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:

[Add Section Headers to Flow Screens](#)

[Salesforce Help: Flow Screen Output Component: Section \(can be outdated or unavailable during release preview\)](#)

## Dependent Picklists Component Is Rebuilt Using Lightning Web Components (LWC)

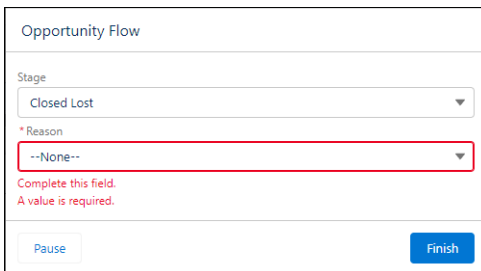
The Dependent Picklists component is now easier for Salesforce to support in all places that run screen flows. With a couple exceptions, the component looks and behaves the same as in earlier releases.

**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 these changes and, if needed, update the affected Dependent Picklists components in your flow screens.

When a user doesn't complete a required field in a Dependent Picklists component, two potentially duplicate error messages can appear. Dependent Picklists components are validated by two systems, and each system can return an error message. Previously, when both systems caught the same error for a required field, only one error message was shown to the user.

In this example, the user skips a required picklist. As a result, one validation system shows Complete this field. And the other validation system shows A value is required.



Also, the error messages can't be read by screen readers or other assistive technology. Sometimes one of the error messages is announced once, but later attempts to focus on the field don't cause the error message to be announced again.

SEE ALSO:

[Salesforce Help: Flow Screen Input Component: Dependent Picklists \(can be outdated or unavailable during release preview\)](#)

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

Design a flow screen with custom screen components that respond to updates on the same screen, and reduce the number of screens for a user to navigate through. Previously, you placed these components on separate screens.

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



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

**Why:** For example, you design a flow screen where a user searches for a knowledge article. As 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 Changes in API Version 55.0

These updates affect only flows and processes that are configured to run on API version 55.0 or later.

**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:** With versioned updates you can 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.

### Merge Fields Evaluate Based on Context

If data coming into a flow includes text that resembles a merge field, the merge field now shows the merge field notation instead of the merge field's evaluated value. This change helps prevent unintentional data exposure and improves flow stability. In API version 54.0 and earlier, merge fields showed the evaluated value.

For example, your org has a flow that includes an account record's description in the text input of a display text component. The account record's description uses merge fields. The description is "{!Account.Industry} company from {!Account.BillingCity}". In API version 54.0 and earlier, the two merge fields are evaluated, so the description would render as "Education company from San Francisco". From API version 55.0 onward, the two merge fields aren't evaluated, so the description renders as "{!Account.Industry} company from {!Account.BillingCity}".

Likewise, in API version 55.0 onward, if an end user enters the merge field {!Account.Name} in an input for a screen flow, it renders as {!Account.Name} and isn't evaluated. In API version 54 and earlier, the account name is rendered. Essentially, if a merge field is used in an input in a way that surfaces data, the merge field isn't evaluated.

If you have flows that rely on using the evaluated merge field values, a workaround is required. Create a custom Apex action that performs an equivalent merge field substitution and then call it in a flow with the Apex Action element.

### Merge Fields Show Assignment-time Values for Collections

When using the add operator on a collection string value, merge fields now show their values at the time of assignment instead of their new values after evaluation. In API version 54.0 and earlier, merge fields still show after-evaluation values.

### Evaluate Criteria Based on Original Record Values in Process Builder

Processes that start when a record changes and have multiple criteria now evaluate the original value of the field, even if the field had an original value of null. If you select the **Do you want to execute the actions only when specified changes are made to the record?** option or it uses the `ISCHANGED()` function in your criteria, this update can cause the process to behave differently. In API version 54.0 and earlier, if the original value of a field is null, the newer value was used in the evaluation.

This change is also included across all API versions in a release update that's enforced in Summer '23.

SEE ALSO:

[Evaluate Criteria Based on Original Record Values in Process Builder \(Release Update\)](#)

## Flow and Process Management

Convert more workflow rules to flows with the Migrate to Flow tool, now generally available. Delete a flow or process version from a managed package.

IN THIS SECTION:

[Convert Workflow Rules to Flows with the Migrate to Flow Tool \(Generally Available\)](#)

Start transitioning to Flow Builder. The Migrate to Flow tool now supports more kinds of workflow rules, including most rule criteria formulas. 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.

[Delete Flow and Process Versions from Managed Packages](#)

Now you can delete a flow or process version from a managed package in the org that uploads the package. If you delete a version, you can't create another version with the same API name. After you delete the version, the org that subscribes to the package keeps the version until someone manually deletes the version in the subscriber org. Previously, you couldn't delete a flow or process version from a managed package in the org that uploaded the package.

### Convert Workflow Rules to Flows with the Migrate to Flow Tool (Generally Available)

Start transitioning to Flow Builder. The Migrate to Flow tool now supports more kinds of workflow rules, including most rule criteria formulas. 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.

**Why:** In Spring '22, the Migrate to Flow tool supported workflow rules that contained these items:

- Field-based criteria
- Field updates
- Email alerts
- Outbound messages
- Time-dependent workflow actions

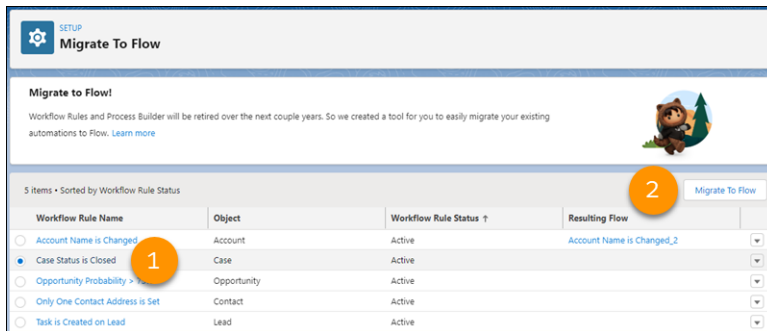
- Rule criteria formula that's set to true (unless evaluation criteria is also set to created, and any time it's edited to subsequently meet criteria)

In Summer '22, the Migrate to Flow tool now also supports:

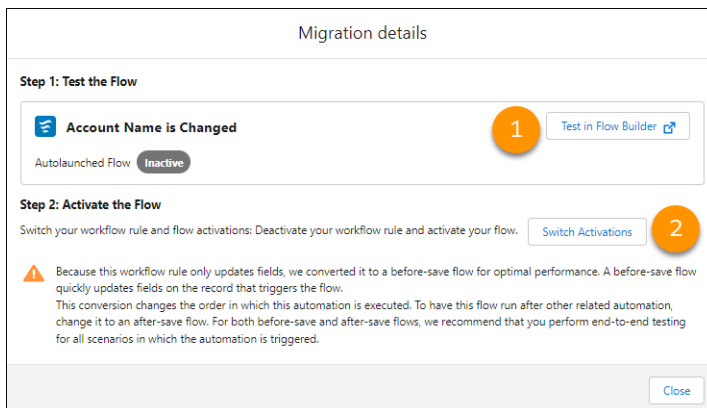
- `Equal to null`
- `Not equal to null`
- Rule criteria formula

Formulas that use `Hour`, `Minute`, `Second`, `TimeNow`, `TimeValue`, `IsClone`, or `$RecordType` aren't supported.

**How:** From Setup, in the Quick Find box, enter *Migrate to Flow*, and then select **Migrate to Flow**. 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).

## Delete Flow and Process Versions from Managed Packages

Now you can delete a flow or process version from a managed package in the org that uploads the package. If you delete a version, you can't create another version with the same API name. After you delete the version, the org that subscribes to the package keeps the version until someone manually deletes the version in the subscriber org. Previously, you couldn't delete a flow or process version from a managed package in the org that uploaded the package.

**Where:** This change applies to first-generation managed packages.

**Who:** To turn on this feature, log a support case in the [Salesforce Partner Community](#). For product, specify **Platform**. For topic, specify **AppExchange & Managed Packages**.

**How:** From Setup, click **Flows**. View the flow details page, and delete a flow version. To delete a version of a process created from Process Builder, use Tooling API.

## Flow Extensions

Enable your users to launch screen flows from Slack. Send custom notifications for Slack.

### IN THIS SECTION:

#### [Send Screen Flows to Slack with an Invocable Action \(Beta\)](#)

Send a message to a Slack channel, a direct message, or the Messages tab of a Slack app that includes a button that a recipient can use to launch a flow.

#### [Send Notifications to Slack with an Invocable Action](#)

You can use a Send Notification action in your flow to send custom notifications for Slack. You can also use a Send Notification action for certain standard notifications enabled for Slack.

## Send Screen Flows to Slack with an Invocable Action (Beta)

Send a message to a Slack channel, a direct message, or the Messages tab of a Slack app that includes a button that a recipient can use to launch a flow.

**Where:** The Slack Send Message to Launch Flow invocable action is available as a Beta Service for sandboxes. The invocable action works with Lightning Experience and Salesforce Classic in Essentials, Professional, 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](#).

**Who:** Users must have a permission set that includes the Connect Salesforce with Slack permission.

**How:** In Flow Builder, build a screen flow that includes only screen components supported in Slack. When you save the flow, select the **Make Available in Slack (Beta)** checkbox in the Advanced area of the Save the flow dialog box. Then build a second flow that includes the `slackSendMessageToLaunchFlow` invocable action, where `FlowName` is the API name of the flow to send.

### SEE ALSO:

[Salesforce Help: Flow Core Actions for Slack: Send Message to Launch Flow \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Make a Flow Available in Slack \(Beta\) \(can be outdated or unavailable during release preview\)](#)

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

## Send Notifications to Slack with an Invocable Action

You can use a Send Notification action in your flow to send custom notifications for Slack. You can also use a Send Notification action for certain standard notifications enabled for Slack.

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

**Who:** To trigger a Send Notification action in flows that run in user context or REST API calls, you must have the Send Custom Notifications user permission.



**How:** In Flow Builder, select the notification as an Action in the flow, then configure the recipients and record associated with the notification. Each Send Notification action corresponds to a supported notification type. For example, if you created a custom Slack notification named My Opportunity Notification, look for the My Opportunity Notification action in the Notifications category.

SEE ALSO:

[Salesforce Help: Flow Core Action: Send Notification Actions \(can be outdated or unavailable during release preview\)](#)

## 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.

#### [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 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.

## 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 because Salesforce didn't include the time consumed by flows and processes in the transaction. 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](#)

## 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. This update is available only for Salesforce orgs that enabled the Require User Access to Apex Classes Invoked by Flow update.

**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.

**Why:** This update disables the older Require User Access to Apex Classes Invoked by Flow update and returns your Salesforce org to its original state. For flows built in Flow Builder and processes built in Process Builder, user access to Apex classes is no longer required for the flows and processes to invoke Apex. When users can run a flow or process, they implicitly have access to its Apex actions. Neither release update affects legacy Apex actions (formerly known as Apex plug-ins) in flows. User access was never restricted for legacy Apex actions.

With this update, flows and processes no longer fail because the running user doesn't have explicit access to an invoked Apex class. Now users who run a flow or process implicitly have access to its invoked Apex classes. And you can apply the principle of least privilege and revoke explicit access for users who only invoke Apex classes via flows and processes.

If your flows or processes fail 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.

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](#)

## 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](#)

## 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 Spring '23.

**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:** 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](#)

## 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 Orchestration

Orchestrator is now Flow Orchestration. Open associated flows in Flow Builder from within an orchestration. Make testing easier with orchestration history milestones. Wake up paused orchestrations with the orchestration system variable. Order your record-triggered orchestrations with Flow Trigger Explorer.

## IN THIS SECTION:

[Open Associated Flows from an Orchestration](#)

Save time and open evaluation, screen, or autolaunched flows in Flow Builder from within an orchestration.

[See New Milestones in Orchestration History](#)

New orchestration history milestones make testing and debugging your orchestrations easier. See when an orchestration is canceled; a stage or step is discontinued; an orchestration, stage, or step encountered an error; or a work item is reassigned.

[Wake Up Paused Orchestrations](#)

You now have access to an orchestration's run ID with the new `$Orchestration.Instance` system variable. Use it to save the ID to a record field so you can reuse it later to fire a Flow Orchestration Event platform event and wake up the associated paused orchestration run. This change gives you greater flexibility to wake up paused orchestrations.

[Order Triggered Orchestrations with Flow Trigger Explorer](#)

Control the order of execution for record-triggered orchestrations with Flow Trigger Explorer. Manage your record-triggered orchestrations for a specified object as part of the Actions and Related Records (after-save) group of flows.

[Deploy Orchestrations with Change Sets](#)

Develop and test orchestrations in a sandbox environment and use a change set to send the orchestration and its associated flows to production.

[Use Improved Orchestrator List Views](#)

Use the Recently Viewed list view for orchestrator runs and orchestrator work items to limit the items you view. Use the new Orchestration Developer Name column in Orchestration Runs list views to identify the API name of the orchestration associated with an orchestration run. Completed, canceled, or failed orchestration runs with no orchestration developer name indicate that the orchestration was deleted from the Flows page in Setup.

## Open Associated Flows from an Orchestration

Save time and open evaluation, screen, or autolaunched flows in Flow Builder from within an orchestration.

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

**How:** To open a flow, with a stage or step selected, click **Open Flow in Flow Builder** for the flow you want to view.



## See New Milestones in Orchestration History

New orchestration history milestones make testing and debugging your orchestrations easier. See when an orchestration is canceled; a stage or step is discontinued; an orchestration, stage, or step encountered an error; or a work item is reassigned.

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

## Wake Up Paused Orchestrations

You now have access to an orchestration's run ID with the new `$Orchestration.Instance` system variable. Use it to save the ID to a record field so you can reuse it later to fire a Flow Orchestration Event platform event and wake up the associated paused orchestration run. This change gives you greater flexibility to wake up paused orchestrations.

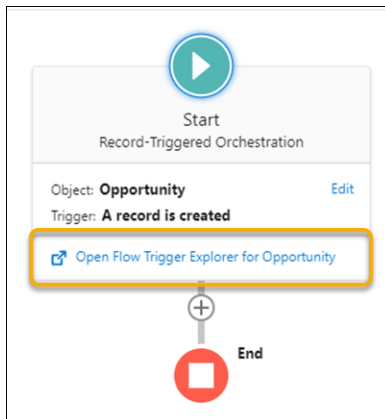
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

## Order Triggered Orchestrations with Flow Trigger Explorer

Control the order of execution for record-triggered orchestrations with Flow Trigger Explorer. Manage your record-triggered orchestrations for a specified object as part of the Actions and Related Records (after-save) group of flows.

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

**How:** In the Start element for a record-triggered orchestration, click **Open Flow Trigger Explorer for [Object name (for example, Opportunity)]**.



## Deploy Orchestrations with Change Sets

Develop and test orchestrations in a sandbox environment and use a change set to send the orchestration and its associated flows to production.

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

**How:** In your source org, activate your orchestration and all its referenced flows. Create the change set, and deploy it to your target org. Referenced flows distributed through a change set are always deployed as inactive in the target org, even if they're active in the source org. This flow limitation means that you must manually activate the referenced flows before you 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.

## Use Improved Orchestrator List Views

Use the Recently Viewed list view for orchestrator runs and orchestrator work items to limit the items you view. Use the new Orchestration Developer Name column in Orchestration Runs list views to identify the API name of the orchestration associated with an orchestration run. Completed, canceled, or failed orchestration runs with no orchestration developer name indicate that the orchestration was deleted from the Flows page in Setup.

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

**How:** In the App Launcher, find and select **Orchestration Runs** or **Orchestration Work Items**. Then select **Recently Viewed** from the list view dropdown.

Name	Status	Recommendation Developer Name	Created By	Created Date	Last Modified By	Last Modified Date
000000001	In Progress	Account_Recommendation	Admin	4/10/2022, 2:09 PM	Admin	4/10/2022, 2:09 PM
000000002	In Progress	Account_Recommendation	Admin	4/10/2022, 1:54 PM	Admin	4/10/2022, 1:54 PM
000000003	Completed	Account_Recommendation	Admin	4/10/2022, 1:54 PM	Admin	4/10/2022, 1:54 PM
000000004	In Progress	Account_Recommendation	Admin	3/10/2022, 10:45 AM	Admin	3/10/2022, 10:45 AM
000000005	In Progress	Account_Recommendation	Admin	4/10/2022, 1:54 PM	Admin	4/10/2022, 1:54 PM
000000006	In Progress	Account_Recommendation	Admin	3/10/2022, 10:32 AM	Admin	3/10/2022, 10:32 AM
000000007	Completed	Account_Recommendation	Admin	3/10/2022, 10:32 AM	Admin	3/10/2022, 10:32 AM
000000008	Completed	Next_Best_Action	Admin	3/10/2022, 2:29 PM	Admin	3/10/2022, 2:29 PM
000000009	Completed	Next_Best_Action	Admin	3/10/2022, 10:45 AM	Admin	3/10/2022, 10:45 AM
000000010	In Progress	Next_Best_Action	Admin	3/10/2022, 10:22 PM	Admin	3/10/2022, 10:22 PM
000000011	Completed	Next_Best_Action	Admin	3/10/2022, 10:45 AM	Admin	3/10/2022, 10:45 AM
000000012	Completed	Next_Best_Action	Admin	3/10/2022, 10:22 AM	Admin	3/10/2022, 10:22 AM
000000013	In Progress	Next_Best_Action	Admin	3/10/2022, 10:11 PM	Admin	3/10/2022, 10:11 PM
000000014	In Progress	Next_Best_Action	Admin	3/10/2022, 10:11 PM	Admin	3/10/2022, 10:11 PM
000000015	In Progress	Next_Best_Action	Admin	3/10/2022, 10:08 PM	Admin	3/10/2022, 10:08 PM
000000016	In Progress	Next_Best_Action	Admin	3/10/2022, 10:08 PM	Admin	3/10/2022, 10:08 PM
000000017	Error	Next_Best_Action	Admin	3/10/2022, 11:44 AM	Admin	3/10/2022, 11:44 AM
000000018	In Progress	Next_Best_Action	Admin	3/10/2022, 10:45 AM	Admin	3/10/2022, 10:45 AM
000000019	In Progress	Next_Best_Action	Admin	3/10/2022, 11:43 AM	Admin	3/10/2022, 11:43 AM
000000020	In Progress	Next_Best_Action	Admin	3/10/2022, 11:43 AM	Admin	3/10/2022, 11:43 AM
000000021	Error	Next_Best_Action	Admin	3/10/2022, 10:29 AM	Admin	3/10/2022, 10:29 AM
000000022	Error	Next_Best_Action	Admin	3/10/2022, 10:27 AM	Admin	3/10/2022, 10:27 AM
000000023	Completed	Account_Recommendation	Admin	2/10/2022, 12:05 PM	Admin	3/10/2022, 10:21 AM
000000024	Completed	Account_Recommendation	Admin	3/10/2022, 10:08 PM	Admin	3/10/2022, 10:08 PM

## Einstein Next Best Action

Use Limit Repetitions to limit the number of times the same recommendation or offer appears on the same record or for the same user.

### IN THIS SECTION:

#### [Limit How Often a Recommendation or Offer Appears](#)

With Next Best Action Limit Repetitions, you can limit the number of times the same recommendation or offer appears on the same record or for the same user during a time period. For example, you can use Limit Repetitions so that service agents don't see the same offer for a customer more than once a week. After you configure Limit Repetitions for a recommendation, Next Best Action captures the user's response to a recommendation or offer and then filters out recommendations that don't meet your thresholds.

## Limit How Often a Recommendation or Offer Appears

With Next Best Action Limit Repetitions, you can limit the number of times the same recommendation or offer appears on the same record or for the same user during a time period. For example, you can use Limit Repetitions so that service agents don't see the same offer for a customer more than once a week. After you configure Limit Repetitions for a recommendation, Next Best Action captures the user's response to a recommendation or offer and then filters out recommendations that don't meet your thresholds.

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

**When:** This functionality is available on a rolling basis starting in the Summer '22 release.

**How:** Create or open a recommendation strategy flow. Add a Limit Repetitions element and select the responses to look for, then enter the number of responses and days to look back. In **Advanced**, you can search for and select the collection with the Limit Repetition output and skip adding an Assignment element to the recommendation strategy flow.

**New Action**

\* Label: Limit Password Reset      \* API Name: Limit\_Password\_Reset

Description: Limit the number of times a user sees a password reset recommendation.

Select Recommendation Collection Variable

\* Recommendation Collection: (X) outputRecommendations X

Set Recommendation Repetition Limits

Set limits on how many times recommendations are displayed to users within the specified time frame. If this flow runs on a record, the element counts responses made on this record. If this flow runs on a page without a record, the element counts responses from the running user.

Look for These Responses: Accepted

\* Look for This Many Responses: 1      \* Look Within This Many Days: 90

▼ Advanced

☒ Manually assign variables

Store Output Values

(X) outputRecommendations from LimitRepetitions

{outputRecommendations}

Cancel Done

SEE ALSO:

[Salesforce Help: Add a Limit Repetitions Element to a Next Best Action Flow](#)(can be outdated or unavailable during release preview)

## Salesforce for Slack Integrations

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

See the release notes for the latest updates: [Salesforce for Slack Integrations Release Notes](#).

## 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:

[Track, Follow, and Monitor the Latest Changes that Vendors Make to their Systems with Dynamic Integration Data Mapping](#)

Using a new custom metadata type, you can map integration data dynamically between Safety Cloud and external systems such as RainFocus, Senneca, and ixlayer.



#### [Personalize Health Verification Emails with Email Mappings](#)

With the new Occasion Email Mapping object, you can specify mappings between Classic Email templates and Marketing Cloud emails.

#### [Add a Wellness Questionnaire to your Health Verification Strategy](#)

Safety Cloud now comes with a preconfigured survey called the Wellness Questionnaire. You can use the questionnaire as part of your organization's health verification strategy to screen event registrants for cold or flu-like symptoms associated with COVID-19.

#### [Manage and Run Multiple Health Verification Configurations Under One Org](#)

In the new Health Verification data model for Safety Cloud, the Occasion object provides multi-event support, allowing a single org to create, manage, and run Health Verifications for multiple events simultaneously. Under the previous data model, there was a one-to-one relationship between an org and health verification. Previously, multiple events requiring Health Verification required dedicating an org for each event.

#### [Purge Health Cards and Health Card-Related Data from Your Safety Cloud System](#)

Customers don't want their sensitive health record information lingering in systems any longer than necessary, and neither do you. With the `SafetyCloudPurge` job, you can ensure that customer health record information is deleted automatically.

#### [Provide Automated Health Verification for SMART Health Cardholders](#)

SMART Health Cards are paper or digital versions of an individual's clinical information, in the form of a QR Code. As SMART Health Cards grow in popularity, organizations requiring individuals to submit health status information for admittance to an event, workplace, or school, need to verify SMART Health Card credentials quickly and accurately. With Safety Cloud, you can now verify SMART Health Card credentials automatically.

#### [Provide Point-of-Entry Health Verification for users with SMART Health Cards](#)

With Digital Health Card support, users can scan the QR code on their SMART Health Card with devices provided by the verifier for point-of-entry verification.

#### [Access the Most Up-to-Date List of SMART Health Card Issuers from the VCI™ Directory](#)

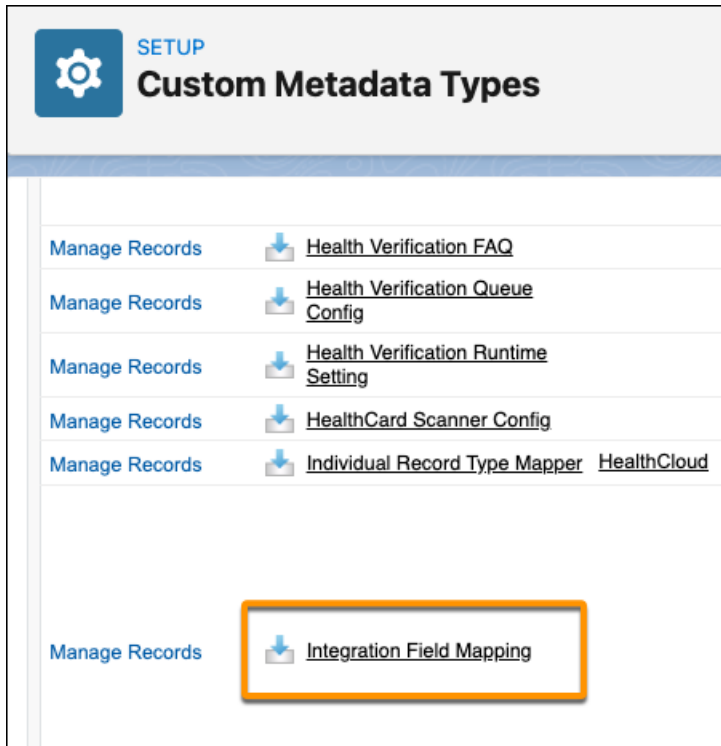
Now you can access the VCI™ Directory, which includes a list of organizations that issue SMART Health Cards. The VCI™ Directory provides you with an accurate list of known SMART Health Card issuers. And it helps organizations determine whether the SMART Health Card shared by the card holder is valid and credible.

## Track, Follow, and Monitor the Latest Changes that Vendors Make to their Systems with Dynamic Integration Data Mapping

Using a new custom metadata type, you can map integration data dynamically between Safety Cloud and external systems such as RainFocus, Senneca, and ixlayer.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** Safety Cloud includes a new custom metadata type named Integration Field Mapping, which allows you to query element names from the JSON string provided by the external system. You can also store and access the values within custom labels in Salesforce.



Integration Field Mapping includes preconfigured field mappings for the systems with which Safety Cloud integrates.

The screenshot shows the 'Integration Field Mappings' page in Salesforce Setup. The page has a 'View: All' dropdown and a 'Create New View' link. A 'New' button is in the top right corner. The table below lists preconfigured field mappings.

Action	Label ↑	Integration Field Mapping Name
Edit	<a href="#">EMedDateOfTest</a>	EMedDateOfTest
Edit	<a href="#">EMedExternalId</a>	EMedExternalId
Edit	<a href="#">EMedId</a>	EMedId
Edit	<a href="#">EMedTestDateTime</a>	EMedTestDateTime
Edit	<a href="#">EMedTestResult</a>	EMedTestResult
Edit	<a href="#">IXLayer Medical Record Num</a>	IXLayer_Med_Rrd_Num
Edit	<a href="#">IXLayerEmail</a>	IXLayerEmail
Edit	<a href="#">IXLayerFirstName</a>	IXLayerFirstName
Edit	<a href="#">IXLayerId</a>	IXLayerId
Edit	<a href="#">IXLayerLastName</a>	IXLayerLastName

You can also create field mappings.

**SETUP**  
**Custom Metadata Types**

### Integration Field Mapping

**Integration Field Mapping Edit** Save Save & New Cancel

**Information**

Label

Integration Field Mapping Name  i

Active ☒

Data Type

Destination Field Name

Destination Object

Integration Name

Source Field Name

Description

Data Type Format

Protected Component ☐ i

Save Save & New Cancel

SEE ALSO:


[Safety Cloud Integrations: Integration Data Mapping](#)

## Personalize Health Verification Emails with Email Mappings




With the new Occasion Email Mapping object, you can specify mappings between Classic Email templates and Marketing Cloud emails.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

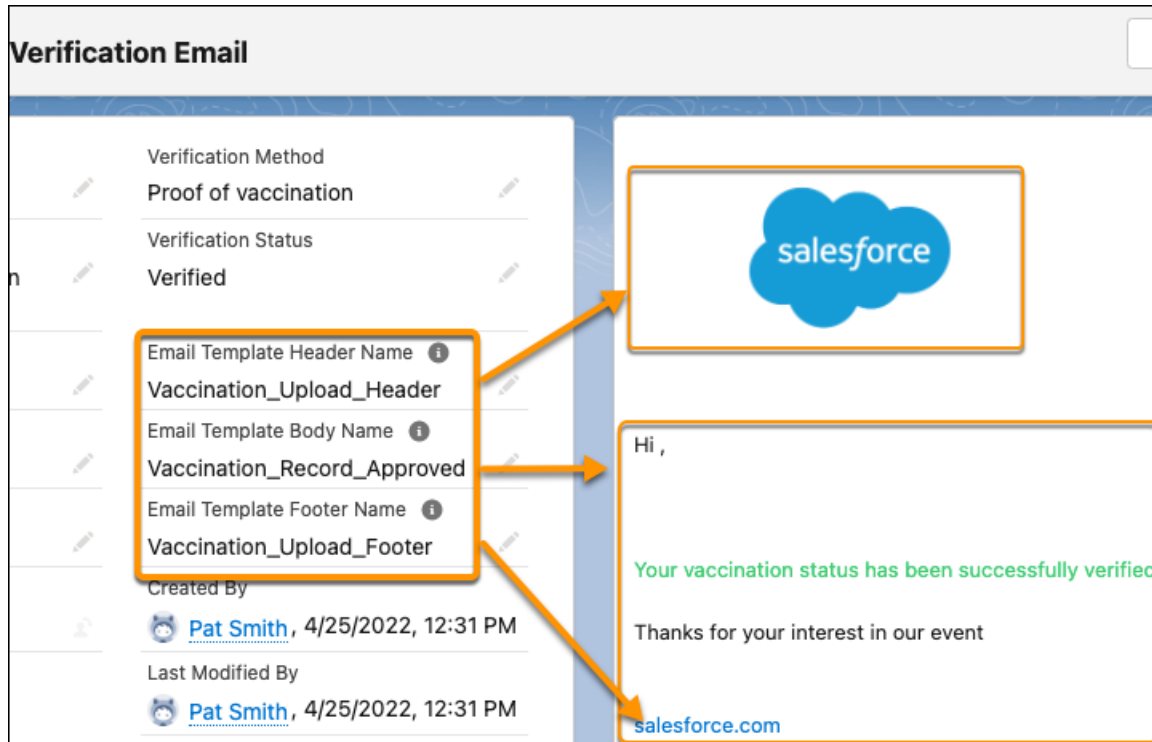
**How:** The Occasion Email Mapping object serves as a bridge between the Health Verification form and the emails generated by Marketing Cloud.

 Occasion Email Mapping

## Company Kickoff Verification Email

Occasion	1	Verification Method	
<a href="#">Company Kickoff</a>		Proof of vaccination	
Occasion Email Mapping Name		Verification Status	
Company Kickoff Verification Email		Verified	
Verification Site URL		Email Template Header Name	
		Vaccination_Upload_Header	
Language		Email Template Body Name	
en_US		Vaccination_Record_Approved	
Marketing Cloud Definition Key	2	Email Template Footer Name	
VAC_ACCEPT_V2		Vaccination_Upload_Footer	
Owner		Created By	
 <a href="#">Pat Smith</a>		 <a href="#">Pat Smith</a> , 4/25/2022, 12:31 PM	
		Last Modified By	
		 <a href="#">Pat Smith</a> , 4/25/2022, 12:31 PM	

When configured, Occasion Email Mapping defines the criteria for sending Health Verification emails by specifying the required Verification Method and Verification Status (1), and the Marketing Cloud Definition Key for the email (2).



You can pass personalized content into the Marketing Cloud email by pairing the send definition from the Occasion Email Mapping with the Classic HTML header, footer, and parts of the email body.

#### SEE ALSO:

[Set up an Email Template for Health Verification](#)

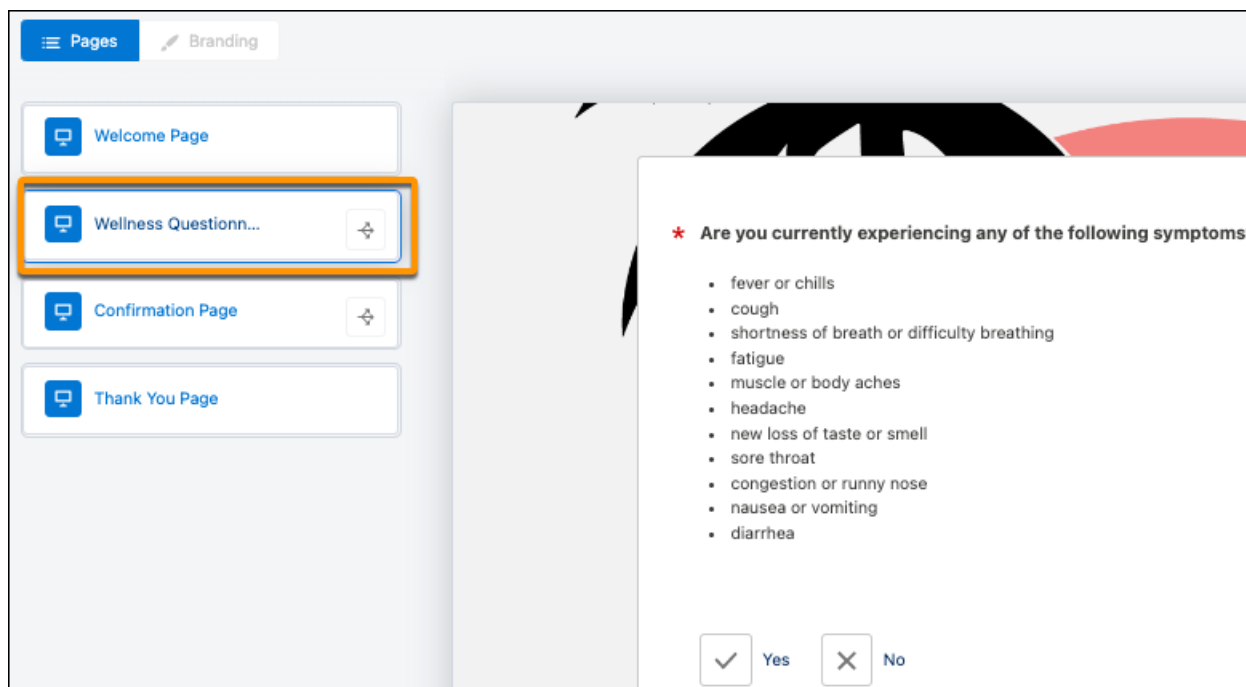
[Set Up Events with Occasions](#)

## Add a Wellness Questionnaire to your Health Verification Strategy

Safety Cloud now comes with a preconfigured survey called the Wellness Questionnaire. You can use the questionnaire as part of your organization's health verification strategy to screen event registrants for cold or flu-like symptoms associated with COVID-19.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** The Wellness Questionnaire consists of a series of health screening questions that respondents are required to answer before being admitted into an event.



After a respondent submits the Wellness Questionnaire, Safety Cloud automatically creates a Health Verification record for the respondent and maps the survey responses to fields on their newly created Health Verification record. An agent reviews the Wellness Questionnaire responses on the respondent's Health Verification record and determines whether to grant access to the event.

SEE ALSO:

- [The Wellness Questionnaire and Health Verification](#)
- [Set Up a Wellness Questionnaire for Health Verifications](#)
- [Customize the Wellness Questionnaire](#)
- [Configure Data Mappings for the Wellness Questionnaire](#)

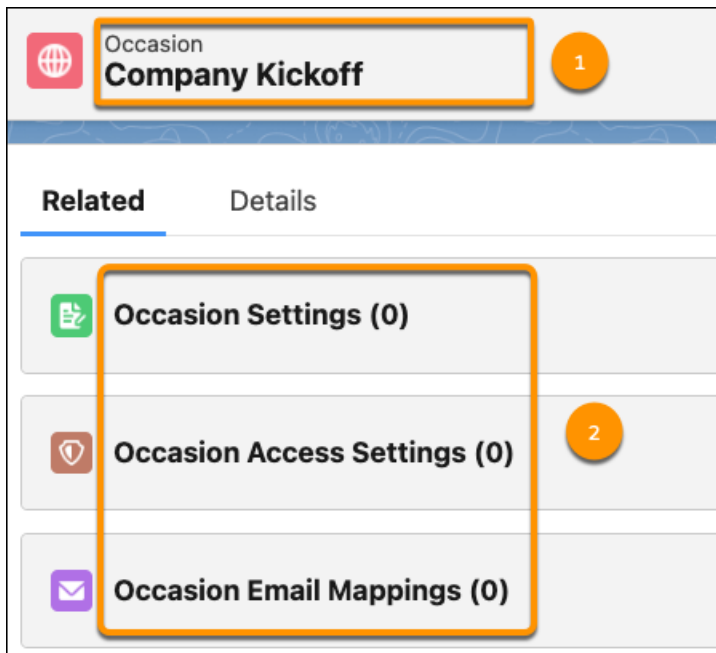
## Manage and Run Multiple Health Verification Configurations Under One Org

In the new Health Verification data model for Safety Cloud, the Occasion object provides multi-event support, allowing a single org to create, manage, and run Health Verifications for multiple events simultaneously. Under the previous data model, there was a one-to-one relationship between an org and health verification. Previously, multiple events requiring Health Verification required dedicating an org for each event.

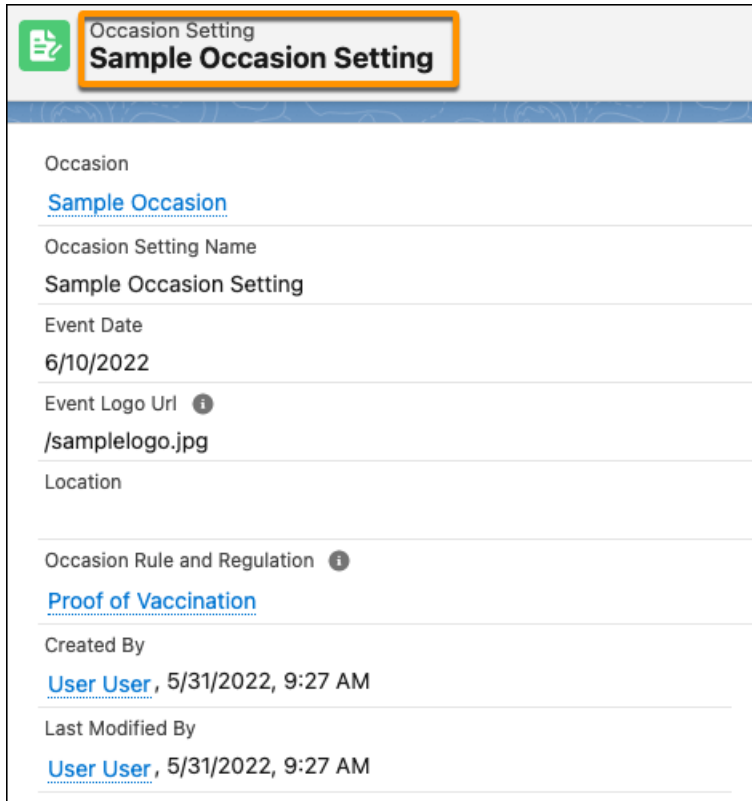
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** Under the new data model, you can use the Occasion Object to create configurations that are tailored to meet event-specific health verification conditions, dates, and criteria. For example, let's say you're reopening offices to employees and holding an in-person kick-off event to introduce a new product at the same time.

With the new data model, you can create a Health Verification configuration for each of these events and run them from the same org simultaneously.



Under the new data model, Health Verification Configuration consists of an Occasion (1), which serves as a wrapper object to several child objects (2). The child objects include the configuration settings that control various aspects of health verification for the Occasion. The Occasion Settings object defines the layout details of the Health Verification form and the Health Verification records that Safety Cloud creates when a user submits the form.




The screenshot shows the Salesforce 'Occasion Setting' page for a record named 'Sample Occasion Setting'. The page has a header with a green icon and the title 'Occasion Setting Sample Occasion Setting'. Below the header, the page is divided into several sections: 'Occasion' with a link to 'Sample Occasion'; 'Occasion Setting Name' with the value 'Sample Occasion Setting'; 'Event Date' with the value '6/10/2022'; 'Event Logo Url' with the value '/samplelogo.jpg' and an information icon; 'Location' (empty); 'Occasion Rule and Regulation' with the value 'Proof of Vaccination' and an information icon; 'Created By' with the value 'User User, 5/31/2022, 9:27 AM'; and 'Last Modified By' with the value 'User User, 5/31/2022, 9:27 AM'.

Occasion	<a href="#">Sample Occasion</a>
Occasion Setting Name	Sample Occasion Setting
Event Date	6/10/2022
Event Logo Url ⓘ	/samplelogo.jpg
Location	
Occasion Rule and Regulation ⓘ	<a href="#">Proof of Vaccination</a>
Created By	<a href="#">User User</a> , 5/31/2022, 9:27 AM
Last Modified By	<a href="#">User User</a> , 5/31/2022, 9:27 AM

The Occasion Access Settings object specifies the date range for which the QR code is valid. It also specifies the type of test or vaccination combinations required for generating a QR code URL and adding it to the Health Verification record.





Occasion Access Setting  
**Sample Occasion Access Setting**

Related
Details

Occasion Access Setting Name	Access Start Datetime ⓘ
Sample Occasion Access Setting	6/6/2022, 12:00 PM
Occasion	Access End Datetime ⓘ
<a href="#">Sample Occasion</a>	6/8/2022, 12:00 PM
Health Verification Method	Access Offset ⓘ
Proof of vaccination	
Health Verification Status	
Verified	
Verification Datetime Field ⓘ	
Verification Datetime Range Start ⓘ	
Verification Datetime Range End ⓘ	
Created By	Last Modified By
<a href="#">User User</a> , 5/31/2022, 9:27 AM	<a href="#">User User</a> , 5/31/2022, 9:27 AM

The Occasion Email Mappings define the criteria for sending Health Verification emails by specifying the required Verification Method and Verification Status and the Marketing Cloud Definition key for the email.

Occasion Email Mapping <b>Company Kickoff Verification Email</b>	
Occasion <a href="#">Company Kickoff</a>	Verification Method Proof of vaccination
Occasion Email Mapping Name Company Kickoff Verification Email	Verification Status Verified
Verification Site URL	Email Template Header Name ⓘ Vaccination_Upload_Header
Language en_US	Email Template Body Name ⓘ Vaccination_Record_Approved
Marketing Cloud Definition Key VAC_ACCEPT_V2	Email Template Footer Name ⓘ Vaccination_Upload_Footer
Owner Pat Smith	Created By Pat Smith, 4/25/2022, 12:31 PM
	Last Modified By Pat Smith, 4/25/2022, 12:31 PM

## SEE ALSO:

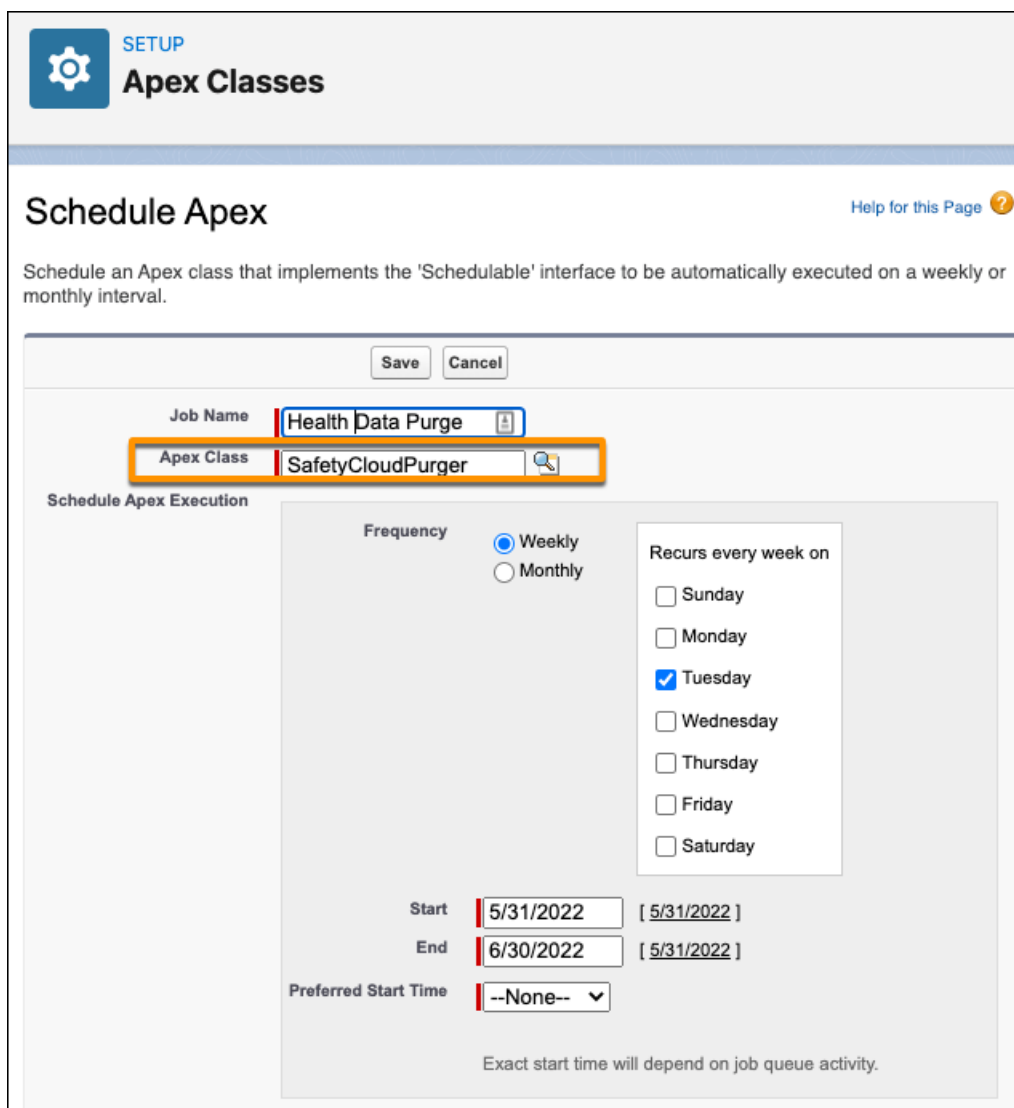
- [Set Up Events with Occasions](#)
- [Create an Occasion](#)
- [Create an Occasion Setting](#)
- [Create Occasion Rules and Regulations for an Occasion Setting](#)
- [Add a Logo for an Occasion Setting](#)
- [Create Occasion Access Settings](#)
- [Define the Send Definitions Configured in Marketing Cloud](#)
- [Create Occasion Email Attribute Mappings](#)

## Purge Health Cards and Health Card-Related Data from Your Safety Cloud System

Customers don't want their sensitive health record information lingering in systems any longer than necessary, and neither do you. With the `SafetyCloudPurge` job, you can ensure that customer health record information is deleted automatically.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** We renamed the `HealthVerificationFilePurger` to `SafetyCloudPurger` and expanded its capabilities to purge Health Cards and Health Card-related data.



**SETUP**  
**Apex Classes**

## Schedule Apex [Help for this Page](#)

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

[Save](#) [Cancel](#)

Job Name

Apex Class

**Schedule Apex Execution**

Frequency  
☒ Weekly  
☐ Monthly

Rekurs every week on

- ☐ Sunday
- ☐ Monday
- ☒ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Start  [ 5/31/2022 ]

End  [ 5/31/2022 ]

Preferred Start Time

Exact start time will depend on job queue activity.

You can now create a Job that uses the `SafetyCloudPurger` Apex Class to delete Health Verification file attachments and Health Card records and associated data, such as vaccine dose information.

The job runs automatically based on a frequency and schedule that you set. After the job completes, you can review information on the Apex Jobs page, such as whether it passed or failed, how long it took to process, and the number of records processed.

SEE ALSO:

[Delete Health Verification Attachments and Health Card Records Automatically with an Apex Job](#)

## Provide Automated Health Verification for SMART Health Cardholders

SMART Health Cards are paper or digital versions of an individual's clinical information, in the form of a QR Code. As SMART Health Cards grow in popularity, organizations requiring individuals to submit health status information for admittance to an event, workplace, or school, need to verify SMART Health Card credentials quickly and accurately. With Safety Cloud, you can now verify SMART Health Card credentials automatically.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** Safety Cloud includes Health Card QR code as a health verification method.

**Verify Your COVID-19 Status**

Pat Smith | For event date: 6/3/2022

**\*Verification Method**

- ☐ Proof of vaccination
- ☒ Health Card QR code
- ☐ Negative COVID-19 test
- ☐ Documentation of COVID-19 with recovery
- ☐ Unable to verify

Make sure the vaccination and test data from your Health Card QR code meet the event date requirements of a final vaccine dose at least 30 days before the event, and a negative COVID-19 test within 2 days of the event.

**\*Verification Files**

Or drop files

**\*Email Address**

Individuals select the Health Card QR Code as a Verification Method (1) and then upload an image of their SMART Health Card (2). After uploading the image to the form, the card holder submits the Health Verification request (3).

Safety Cloud distinguishes between laboratory result data and vaccination data, extracts the payload from the QR code, and verifies the credential.

SEE ALSO:

[Health Card QR Code Verification](#)

## Provide Point-of-Entry Health Verification for users with SMART Health Cards

With Digital Health Card support, users can scan the QR code on their SMART Health Card with devices provided by the verifier for point-of-entry verification.

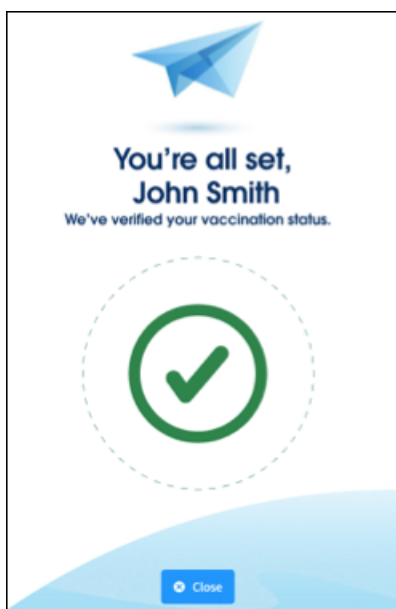
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** With Safety Cloud, individuals can scan the QR code on their SMART Health Card using the Visualforce barcode scanner page on a verifiers device.

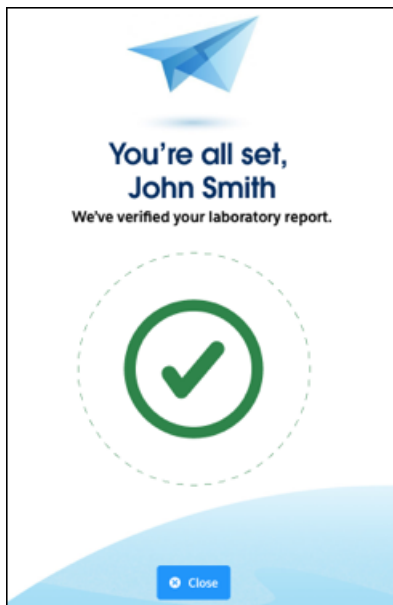
Safety Cloud distinguishes between laboratory result data and vaccination data, extracts the payload from the QR code, and verifies the credential.



Safety Cloud extracts the payload from the QR code on the scanned image, verifies the credential automatically, and presents the results to the card holder.



For lab report data, the user interface displays "We've verified your [laboratory report]" on the application's confirmation page.



SEE ALSO:

[Point-of-Entry Health Verification](#)

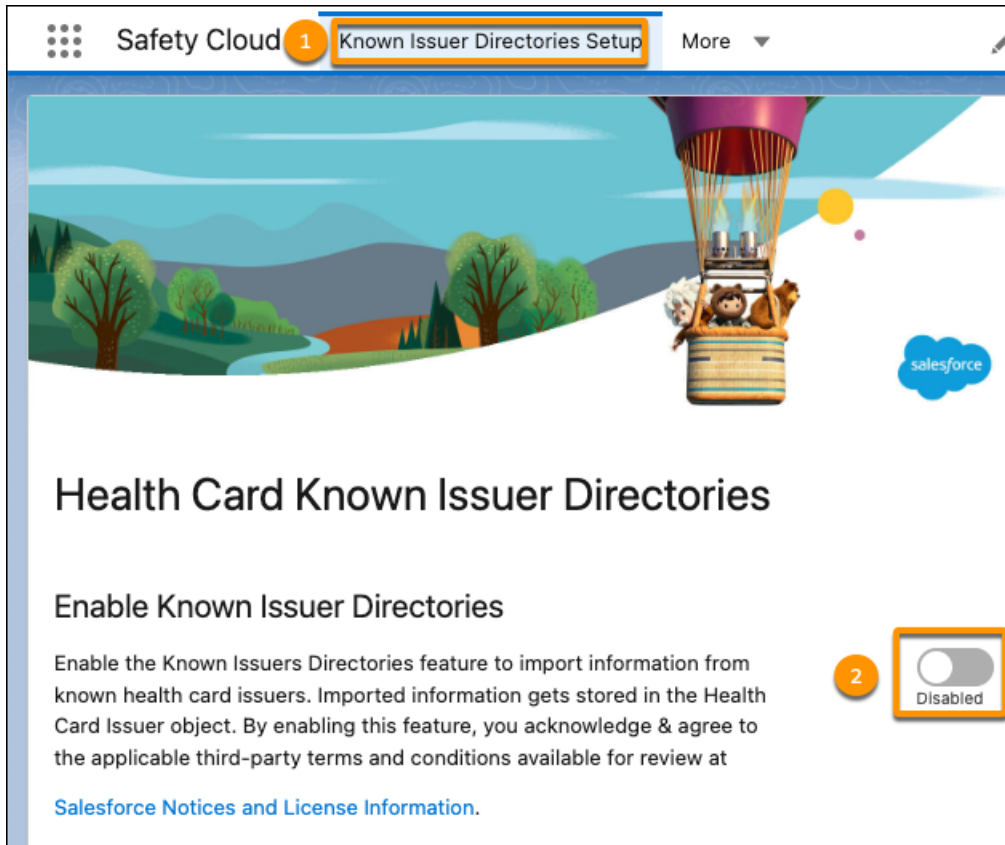
[Configure the Visualforce Barcode Scanner Page for Point-of-Entry Verification](#)

## Access the Most Up-to-Date List of SMART Health Card Issuers from the VCI™ Directory

Now you can access the VCI™ Directory, which includes a list of organizations that issue SMART Health Cards. The VCI™ Directory provides you with an accurate list of known SMART Health Card issuers. And it helps organizations determine whether the SMART Health Card shared by the card holder is valid and credible.

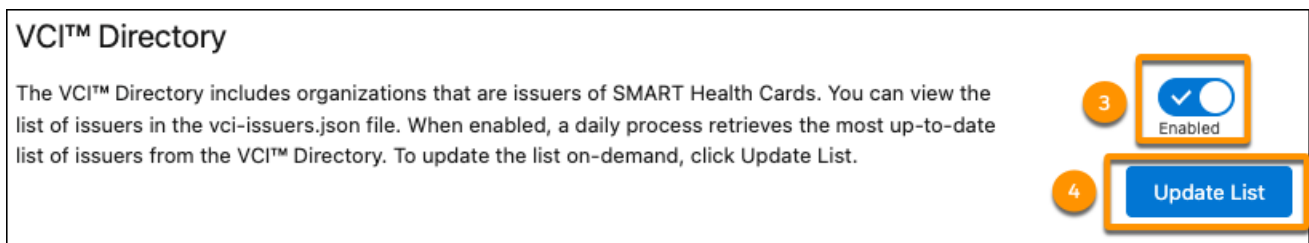
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Safety Cloud is available only in Lightning Experience.

**How:** Enable the Known Issuers Directory to import Known Issuer data.



From the Safety Cloud app, find and select the **Known Issuer Directories Setup** tab (1). Using the toggle, enable the Known feature (2).

After activating the feature, you see a list of Known Issuer Directories.



Initially, VCI™ is the only directory that displays. When you enable the VCI™ Directory (3), a daily process retrieves the most up-to-date list of issuers from the VCI™ Directory. To update the list on demand, click Update List (4).

SEE ALSO:

[Enable the Known Issuers Directory](#)

## Security, Identity, and Privacy

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Enhanced domains now work with sandboxes, offer redirects, and lend more secure login options. You can now log in with your Microsoft credentials, access and maintain consumer keys and consumer secrets more securely, and streamline your transition to using multi-factor authentication. Gather preference information consistently with reusable templates in Privacy Center. Salesforce Shield offers encryption and event tracking for more data and control over Transaction Security metering behavior. Use Security Center to create security-centric reports, and define security policies for all connected tenants (generally available). Private Connect support for AWS integrations is available in the EMEA and APAC regions. And remember to prepare inbound and outbound connections for the Private Connect network upgrade.

### IN THIS SECTION:

#### [Backup and Restore](#)

The Backup and Restore managed package adds date range fields to help you find the records you want to restore. You can also preview records before you restore them and control how to handle child records during the restore process.

#### [Domains](#)

To meet the latest browser requirements, enable enhanced domains. In new sandboxes, enhanced domains are enabled by default. You can redirect your site URLs separately from your previous My Domain URLs after you enable enhanced domains. And update your allowlists to prepare for partitioned domains.

#### [Identity and Access Management](#)

New features are available to prepare your org for multi-factor authentication (MFA) auto-enablement and enforcement. Your users can now register WebAuthn (FIDO2) security keys as an MFA verification method. Your employees and customers can log in to Salesforce with their Microsoft credentials. You can improve connected app security by rotating the consumer key and consumer secret, and by blocking connected apps from using the OAuth 2.0 username-password flow. As part of regular maintenance, Salesforce is upgrading its SAML framework in Spring '23, so start testing your SAML integrations now.

#### [Privacy Center](#)

Create Consent Templates in Preference Center (beta), which is a new method for populating the preference forms where your customers indicate how they wish to be contacted.

#### [Salesforce Shield](#)

Fine-tune Transaction Security metering and policy application controls. The Permission Set Event is now generally available. See more event data in the API Total Usage, Lightning Page View, and Transaction Security event types. And add another layer of security to data collected in Service Cloud Voice by encrypting the Participant Display Name field on the Conversation Participant object.

#### [Security Center](#)

Create more security policy types to deploy to your connected tenants. Gain insight into your security posture by monitoring metrics such as threat detection. Export your Security Center data with the click of a button. And track changes to even more metrics in Security Center.

#### [Other Security Changes](#)

Validate your custom features that redirect users to a URL, and prevent users from connecting to untrusted URLs. Define Content Security Policy (CSP) Trusted Sites for your Visualforce pages, and help your users safely interact with external websites on your custom Visualforce pages with cross-origin headers. Private Connect support for AWS integrations is available in the EMEA and APAC regions. Reprovision your inbound and outbound connections before Private Connect legacy network is retired.

## Backup and Restore

The Backup and Restore managed package adds date range fields to help you find the records you want to restore. You can also preview records before you restore them and control how to handle child records during the restore process.



## IN THIS SECTION:

[Restore Data Using Date Ranges](#)

In the 1.120 version of the Backup and Restore app, you can now find and restore data by using date ranges. Search for backups from a date range and then preview records before restoring them. You can select records for restoration and define how child records are handled.

## Restore Data Using Date Ranges

In the 1.120 version of the Backup and Restore app, you can now find and restore data by using date ranges. Search for backups from a date range and then preview records before restoring them. You can select records for restoration and define how child records are handled.

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

**When:** This change is available in July 2022.

**Why:** Sometimes you want to identify and restore specific records. For example, a user inadvertently introduced an error during their first month on the job that overwrote critical data. If you don't know the overwrite date, search for backups made during the time window when the error most likely affected records. The new System ModStamp column shows each record's latest backup date and time to further narrow your search.

You can also define how to handle child records during restoration. On the Review & Restore screen, select **Include Children**. You can restore child records to the state of their most recent backup, their state at the time of the parent record's backup, or you can take no action.

Object Name	Updated Record Options	Deleted Record Options
AccountBrand	Do nothing, do not restore child	Restore child to state at time of parent delete
AccountContactRule	Do nothing, do not restore child	Restore child to state at time of parent delete
Asset	Restore child to last seen state	Restore child to state at time of parent delete
Event	Do nothing, do not restore child	Restore child to state at time of parent delete
Note	Restore child to state at time of parent update	Restore child to state at time of parent delete
Task	Do nothing, do not restore child	Restore child to state at time of parent delete

**How:** App updates are automatically available in all previously installed Backup and Restore apps. For best results, limit your data search range to one month.

## Domains

To meet the latest browser requirements, enable enhanced domains. In new sandboxes, enhanced domains are enabled by default. You can redirect your site URLs separately from your previous My Domain URLs after you enable enhanced domains. And update your allowlists to prepare for partitioned domains.

## IN THIS SECTION:

[Enable Enhanced Domains \(Release Update\)](#)

To comply with the latest browser and security standards, enable enhanced domains on 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. 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 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23 for production orgs. For sandboxes and non-production orgs, the enforcement date is still Winter '23 unless you enable a new org-level setting that postpones the enforcement to Spring '23.

[Use Enhanced Domains in New and Refreshed Sandboxes](#)

To help you test enhanced domains, they're enabled by default in new and refreshed sandboxes. If enhanced domains aren't enabled in your production org, you can disable this option.

[Redirect Your Site URLs After You Enable Enhanced Domains](#)

When you enable enhanced domains, the `*.force.com` URLs for your Experience Cloud sites and Salesforce Sites change. To minimize disruption for users who visit your previous `*.force.com` URLs, choose whether to redirect those public-facing URLs to your current site URL or to return an error message.

[Prepare for Partitioned Domains](#)

To maximize the availability of your orgs, My Domain uses partitioned domains for new Developer Edition orgs, demo orgs, sandboxes, scratch orgs, patch orgs, free orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which makes it easier to identify an org by a URL. To prepare for this change, update your allowlists for the new domains.

[Test Your Custom Domain That Uses a Third-Party CDN in a Sandbox](#)

Before you enable a custom domain that uses a third-party Content Delivery Network (CDN) in production, develop and test the domain in a sandbox. A custom domain, such as `https://www.example.com`, serves your Experience Cloud sites or Salesforce Sites.

[Enable the Salesforce CDN Partner in a Sandbox Custom Domain](#)

Test a custom domain that uses the Salesforce CDN partner to serve your Experience Cloud site in a sandbox before you enable the updated domain in production.

[Improve Code Security with My Domain Logins](#)

For an extra layer of security, use your My Domain login URL to access your Salesforce org with code. Although you can continue to use the generic Salesforce login URLs, your My Domain login URL is unique. And, unlike instanced URLs such as `na47.salesforce.com`, it continues to work when your org is moved to another instance. Because we recommend this approach, My Domain URL placeholders replace the generic `login.salesforce.com` and `test.salesforce.com` login URLs in our Salesforce Help and Developer documentation.

[Wait 15 Minutes Between Domain Changes](#)

To avoid potential conflicts between follow-up processes such as CNAME and DNS updates, you can't make two domain changes that require provisioning within 15 minutes.

[Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs](#)

The Enable Enhanced Domains release update is enforced for sandboxes and non-production orgs in Winter '23. If you need more time to test enhanced domains in sandboxes and non-production orgs, you can postpone the enforcement date to Spring '23 using an org-level My Domain setting. Non-production orgs include demo orgs, Developer Edition orgs, free orgs, patch orgs, Trailhead Playgrounds, and trial orgs. For production and scratch orgs, the enforcement date is automatically postponed to Spring '23 without any action required.

### [Other My Domain Changes](#)

To help you make My Domain changes, the My Domain Setup screen was updated. The button to revert a provisioned My Domain change is now called Cancel New Domain. And to help you understand your choices, the domain suffix picklist values were updated.

## Enable Enhanced Domains (Release Update)

To comply with the latest browser and security standards, enable enhanced domains on 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. 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 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23 for production orgs. For sandboxes and non-production orgs, the enforcement date is still Winter '23 unless you enable a new org-level setting that postpones the enforcement to Spring '23.

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

**When:** Salesforce enforces this update for sandboxes and non-production orgs in Winter '23 if you don't postpone the enforcement using the My Domain setting. Salesforce enforces this update for production orgs and all remaining orgs 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.

Enhanced domains are available in all orgs. All qualifying orgs created in Summer '22 or later get enhanced domains by default. For updates about this feature, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

**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.

To postpone the enforcement to Spring '23 for sandboxes and non-production orgs, from Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. Under My Domain Details, select **Edit**, then select **Postpone the enforcement of enhanced domains until Spring '23**. Click **Save**. Repeat for all sandboxes and non-production orgs where you want to postpone the enforcement.

### SEE ALSO:

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

[Knowledge Article: Plan for Salesforce Domain Changes: My Domain and Enhanced Domains \(can be outdated or unavailable during release preview\)](#)

[Release Updates](#)

[Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs](#)

## Use Enhanced Domains in New and Refreshed Sandboxes

To help you test enhanced domains, they're enabled by default in new and refreshed sandboxes. If enhanced domains aren't enabled in your production org, you can disable this option.

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

**How:** You can disable this option if enhanced domains aren't enabled in production and your production org has a sandbox or can create a sandbox. Before you create or refresh your sandbox, in production, update the **Use enhanced domains by default in new and refreshed sandboxes** setting in the Routing section of the My Domain Setup page.

**Routing** Save Cancel

**Salesforce Edge Network** Salesforce Edge Network applies to most provisioned and deployed domains for this org. See Salesforce Edge Network in Salesforce Help for details. This org uses Salesforce Edge Network. [i](#)

**Enhanced Domains** ☒ Use enhanced domains by default in new and refreshed sandboxes

Save Cancel

SEE ALSO:

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

[Salesforce Help: Sandbox Licenses and Storage Limits by Type \(can be outdated or unavailable during release preview\)](#)

## Redirect Your Site URLs After You Enable Enhanced Domains

When you enable enhanced domains, the `*.force.com` URLs for your Experience Cloud sites and Salesforce Sites change. To minimize disruption for users who visit your previous `*.force.com` URLs, choose whether to redirect those public-facing URLs to your current site URL or to return an error message.

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

**How:** If a previous URL that ends in `force.com` served your Experience Cloud sites URL or Salesforce Sites, you can find the setting in the Routing section of the My Domain Setup page. This setting lists the specific site URLs to be redirected and is enabled by default.

**Routing** Save Cancel

**Salesforce Edge Network** Salesforce Edge Network applies to most provisioned and deployed domains for this org. See Salesforce Edge Network in Salesforce Help for details. This org uses Salesforce Edge Network. [i](#)

**Previous My Domain URL** mycompany.my.salesforce.com without enhanced domains  
☐ Redirect previous My Domain URLs to your current My Domain [i](#)  
Remove Previous My Domain [i](#)

**Enhanced Domains** ☒ Use enhanced domains in new and refreshed sandboxes

**Previous force.com Site URLs** ☒ Redirect mycompany.force.com and mycompanyportal.force.com URLs to your current My Domain site URLs [i](#)

Save Cancel

SEE ALSO:

[Salesforce Help: Disable Redirects for Your Previous Force.com Site URLs \(can be outdated or unavailable during release preview\)](#)

## Prepare for Partitioned Domains

To maximize the availability of your orgs, My Domain uses partitioned domains for new Developer Edition orgs, demo orgs, sandboxes, scratch orgs, patch orgs, free orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which makes it easier to identify an org by a URL. To prepare for this change, update your allowlists for the new domains.

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

**When:** Sandbox orgs are partitioned when you enable enhanced domains. This feature is available before Winter '23 in some non-production and non-sandbox orgs with enhanced domains. When each partition is available, new orgs of that type are partitioned by default. For updates about the availability of this feature by org type, join the [My Domain and Enhanced Domains](#) group in the Trailblazer Community.

**Why:** Partitioned domains allow Salesforce to gradually roll out service delivery changes by org type. For example, Developer Edition orgs can get an update separately from production orgs. This staggered approach maximizes the availability of production and sandbox orgs.

Here are the partition names by org type.

- Demo orgs: demo
- Developer Edition orgs: develop
- Free orgs: free
- Patch orgs: patch
- Scratch orgs: scratch
- Trailhead Playgrounds: trailblaze

For example, the My Domain login URL format for a partitioned scratch org is `https://MyDomainName.scratch.my.salesforce.com`.

**How:** To prepare for this change, update your allowlists to ensure that your users can connect to the partitioned domains.

In Developer Edition orgs, scratch orgs, free orgs, and Trailhead Playgrounds with enhanced domains, you can enable or disable this feature in the My Domain Details section of the My Domain Setup page. This option is only available if partitioning is available for your org type. When you change the **Use partitioned domains** option, you can preview your new My Domain login URL at the bottom of the screen.

**My Domain Details** [Save] [Cancel]

Current My Domain URL: **mycompany-dev-ed.my.salesforce.com** with enhanced domains

Before changing your My Domain details, review My Domain Considerations in Salesforce Help.

If you change your My Domain name or suffix, you must deploy your new My Domain.

My Domain Name:  [Check Availability]

Domain Suffix:  ▼

☒ Use enhanced domains ⓘ

Domain Partitioning: ☒ Use partitioned domains

Your chosen new My Domain URL: **mycompany-dev-ed.develop.my.salesforce.com** with partitioned enhanced domains

[Save] [Cancel]

SEE ALSO:

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

[Salesforce Help: Update Your Org and Test My Domain Changes](#) (can be outdated or unavailable during release preview)

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

## Test Your Custom Domain That Uses a Third-Party CDN in a Sandbox

Before you enable a custom domain that uses a third-party Content Delivery Network (CDN) in production, develop and test the domain in a sandbox. A custom domain, such as `https://www.example.com`, serves your Experience Cloud sites or Salesforce Sites.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This feature is newly available in Government Cloud, Public Cloud, and Hyperforce orgs.

**How:** On the Domains Setup page, in the Associated org field, select your sandbox. Then select the HTTPS option, **A non-Salesforce host or service serves this domain over HTTPS**. Or, if you're in the process of configuring DNS or adding a subdomain with a CNAME that points to another service, you can select the HTTPS option, **Temporary non-HTTPS domain**.

SEE ALSO:

[Salesforce Help: Test Your Custom Domains in a Sandbox \(can be outdated or unavailable during release preview\)](#)

## Enable the Salesforce CDN Partner in a Sandbox Custom Domain

Test a custom domain that uses the Salesforce CDN partner to serve your Experience Cloud site in a sandbox before you enable the updated domain in production.

**Where:** This change applies to [Aura](#), [LWR](#), and [Visualforce sites](#) served by a custom domain and accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Only single certificates are supported for custom domains on the Salesforce CDN partner in a sandbox. Government Cloud Plus orgs are currently excluded from using custom domains on the Salesforce CDN partner in a sandbox.

SEE ALSO:

[Test a Custom Domain with the Salesforce CDN Partner in a Sandbox](#)

## Improve Code Security with My Domain Logins

For an extra layer of security, use your My Domain login URL to access your Salesforce org with code. Although you can continue to use the generic Salesforce login URLs, your My Domain login URL is unique. And, unlike instanced URLs such as `na47.salesforce.com`, it continues to work when your org is moved to another instance. Because we recommend this approach, My Domain URL placeholders replace the generic `login.salesforce.com` and `test.salesforce.com` login URLs in our Salesforce Help and Developer documentation.

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

**How:** To get the hostname of your My Domain login URL in Apex, use the `getOrgMyDomainHostname()` method of the `System.DomainCreator` class.

SEE ALSO:

[Salesforce Help: Log In to Salesforce with Code \(can be outdated or unavailable during release preview\)](#)

## Wait 15 Minutes Between Domain Changes

To avoid potential conflicts between follow-up processes such as CNAME and DNS updates, you can't make two domain changes that require provisioning within 15 minutes.

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

**Why:** These domain changes require provisioning.

- Deploying a change to your My Domain name or suffix
- Enabling or disabling enhanced domains
- Removing a previous My Domain name
- Moving to Salesforce Edge Network

SEE ALSO:

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

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

## Postpone the Enforcement of Enhanced Domains in Sandboxes and Non-Production Orgs

The Enable Enhanced Domains release update is enforced for sandboxes and non-production orgs in Winter '23. If you need more time to test enhanced domains in sandboxes and non-production orgs, you can postpone the enforcement date to Spring '23 using an org-level My Domain setting. Non-production orgs include demo orgs, Developer Edition orgs, free orgs, patch orgs, Trailhead Playgrounds, and trial orgs. For production and scratch orgs, the enforcement date is automatically postponed to Spring '23 without any action required.

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

**When:** Salesforce enforces the Enable Enhanced Domains release update for sandboxes and non-production orgs in Winter '23 if you don't postpone the enforcement using the My Domain setting. 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 your sandbox or non-production org gets the Winter '23 release, postpone enforcement. From Setup, in the Quick Find box, enter *My Domain*, and then select **My Domain**. In the Routing section, select **Edit**, then select **Postpone the enforcement of enhanced domains until Spring '23**. Click **Save**. Repeat for all sandboxes and non-production orgs where you want to postpone the enforcement.

This setting is enabled by default in sandbox orgs whose source production org has the **Use enhanced domains by default in new and refreshed sandboxes** setting disabled. This setting is enabled by default and can't be disabled in production orgs or in scratch orgs.

SEE ALSO:

[Enable Enhanced Domains \(Release Update\)](#)

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

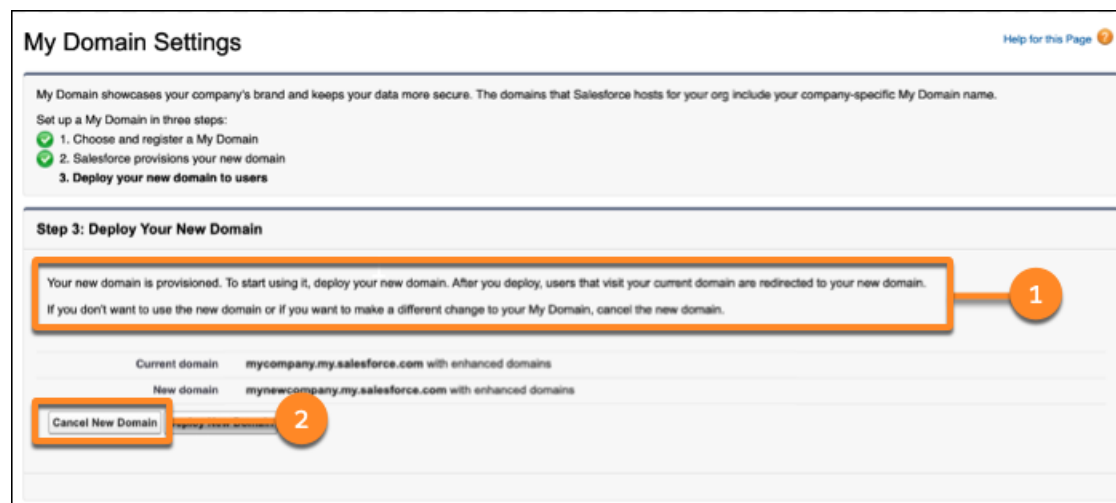
## Other My Domain Changes

To help you make My Domain changes, the My Domain Setup screen was updated. The button to revert a provisioned My Domain change is now called Cancel New Domain. And to help you understand your choices, the domain suffix picklist values were updated.

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

**Why:** When you edit My Domain Details, the examples in the domain suffix picklist values reflect the specific choices for your org. For example, in a Developer Edition org, the first option is Standard (\*.develop.my.salesforce.com) instead of Standard (\*.my.salesforce.com) when partitioned domains are available and enabled.

Here's the updated My Domain page when a change is provisioned and ready to be deployed.



The instructional text now clarifies that users are redirected from your previous My Domain to your new My Domain login URLs by default (1). To revert a provisioned My Domain change without deploying it, you now click **Cancel New Domain** (2). Previously, this button was labeled Keep Current Domain.

SEE ALSO:

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

[Prepare for Partitioned Domains](#)

## Identity and Access Management

New features are available to prepare your org for multi-factor authentication (MFA) auto-enablement and enforcement. Your users can now register WebAuthn (FIDO2) security keys as an MFA verification method. Your employees and customers can log in to Salesforce with their Microsoft credentials. You can improve connected app security by rotating the consumer key and consumer secret, and by blocking connected apps from using the OAuth 2.0 username-password flow. As part of regular maintenance, Salesforce is upgrading its SAML framework in Spring '23, so start testing your SAML integrations now.

IN THIS SECTION:

[Get Ready for Multi-Factor Authentication Auto-Enablement and Enforcement](#)

The requirement to use multi-factor authentication (MFA) when accessing your Salesforce org went into effect on February 1, 2022. If you haven't fully satisfied this requirement, keep in mind that in the future we are automatically enabling and enforcing MFA for all direct (username and password) logins to the UI. To avoid disruptions to your business when these actions occur, and to protect your valuable data, we strongly recommend enabling MFA yourself as soon as possible. To speed things up, you can now turn on MFA for everyone in your org at once. And a new user permission lets you exclude use cases that are exempt from the MFA requirement.



### [Verify User Identity with WebAuthn \(FIDO2\) Security Keys](#)

To meet the latest authentication standards, Salesforce now supports WebAuthn security keys. Users can register a WebAuthn or U2F security key for identity verification. To maintain compatibility with web browsers, previously registered U2F keys adopt WebAuthn APIs when used for the first time after Summer '22.

### [Bypass MFA Challenges for Single Sign-On Auth Provider Logins \(Release Update\)](#)

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. MFA challenges are now bypassed for users who are assigned the user permission Multi-factor Authentication for User Interface Logins and are logging in with an SSO Auth Provider. This update was first made available in Winter '22.

### [Securely Update Email Addresses and Reset Passwords \(Release Update\)](#)

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. To ensure the security of your org, users must 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 new email address became active as soon as you saved the change, bypassing verification. This update was first made available in Summer '21.

### [Login Enhancements for Microsoft](#)

Make it easy for employees and customers to log in to Salesforce by setting up single sign-on (SSO) with a Microsoft authentication provider. Your users can access your Salesforce org or Experience Cloud site with their Microsoft credentials.

### [Rotate the Consumer Key and Consumer Secret of a Connected App](#)

Improve the security of your connected apps with minimal app downtime. To keep your consumer key and consumer secret fresh, you can swap them with new consumer details. Prepare for the new details by generating staged values and sharing them with your connected app integrations. When you're ready, apply the new consumer details.

### [Verify Your Identity to Access Consumer Key and Consumer Secret](#)

To improve security, you're required to verify your identity before viewing your connected app's consumer key and consumer secret, also known as the client ID and client secret. On the connected app's Manage Connected Apps page, you must complete multi-factor authentication (MFA) using one of your registered identity verification methods before you can see the consumer details. You can view the consumer details for up to 5 minutes before you're challenged to verify your identity again.

### [Block the OAuth 2.0 Username-Password Flow at an Org-Wide Level](#)

To keep your org secure, you can block all connected apps in your org from using the OAuth 2.0 username-password flow. We recommend blocking the flow so that developers can't use it to build new integrations. Blocking the flow can break any existing integrations that use the flow, such as managed packages and mobile apps. Before blocking the flow, audit and test your integrations so you can avoid disruptions.

### [Upgrade SAML Single Sign-On Framework \(Release Update\)](#)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This update can impact integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, even when you're using Identity for Employees or Salesforce Customer Identity, including Experience Cloud.

## Get Ready for Multi-Factor Authentication Auto-Enablement and Enforcement

The requirement to use multi-factor authentication (MFA) when accessing your Salesforce org went into effect on February 1, 2022. If you haven't fully satisfied this requirement, keep in mind that in the future we are automatically enabling and enforcing MFA for all direct (username and password) logins to the UI. To avoid disruptions to your business when these actions occur, and to protect your valuable data, we strongly recommend enabling MFA yourself as soon as possible. To speed things up, you can now turn on MFA for everyone in your org at once. And a new user permission lets you exclude use cases that are exempt from the MFA requirement.

## IN THIS SECTION:

[Enable Multi-Factor Authentication for Your Entire Org](#)

Now you can turn on MFA for all the users in your org with the click of a checkbox. This setting is the fastest way to satisfy the MFA requirement. It's also the setting that Salesforce will use to automatically enable and enforce MFA in the future.

[Exclude Exempt Users from Future MFA Auto-Enablement and Enforcement](#)

There are several use cases that are exempt from the MFA requirement. Salesforce will automatically exclude many of these cases when auto-enablement and enforcement milestones go into effect in the future. But even if you're fully in compliance with the MFA requirement now, there are some exempt use cases that you must exclude on your own. If any of these situations apply to your org, avoid disruptions by using the new Waive Multi-Factor Authentication for Exempt Users user permission before Salesforce enables and enforces MFA.

## SEE ALSO:

[MFA Requirement Is in Effect and Enforcement Is Coming](#)[Salesforce MFA FAQ](#)[MFA Enforcement Roadmap](#)

## Enable Multi-Factor Authentication for Your Entire Org

Now you can turn on MFA for all the users in your org with the click of a checkbox. This setting is the fastest way to satisfy the MFA requirement. It's also the setting that Salesforce will use to automatically enable and enforce MFA in the future.

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

**When:** As of February 1, 2022, Salesforce customers are contractually required to use MFA when accessing Salesforce products, per the [Salesforce Trust and Compliance Documentation](#). In the future, Salesforce is automatically enabling and enforcing MFA for all orgs. To monitor the projected dates for the auto-enablement and enforcement milestones, see the [MFA Enforcement Roadmap](#).

**How:** To enable MFA for all users in your org, from Setup, in the Quick Find box, enter *Identity* and select **Identity Verification**. Then select **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org**.

Users who are already enabled via the Multi-Factor Authentication for User Interface Logins user permission experience no change when you apply this org-level setting. The Waive Multi-Factor Authentication for Exempt Users user permission overrides this setting.



**Note:** If you want to roll out MFA to different groups of users over time, use the Multi-Factor Authentication for User Interface Logins user permission instead of this org setting.

## SEE ALSO:

[Salesforce MFA FAQ](#)[MFA Requirement Is in Effect and Enforcement Is Coming](#)[Exclude Exempt Users from Future MFA Auto-Enablement and Enforcement](#)[Salesforce Help: Enable MFA for Your Entire Org](#)

## Exclude Exempt Users from Future MFA Auto-Enablement and Enforcement

There are several use cases that are exempt from the MFA requirement. Salesforce will automatically exclude many of these cases when auto-enablement and enforcement milestones go into effect in the future. But even if you're fully in compliance with the MFA requirement now, there are some exempt use cases that you must exclude on your own. If any of these situations apply to your org, avoid disruptions by using the new Waive Multi-Factor Authentication for Exempt Users user permission before Salesforce enables and enforces MFA.

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


**When:** As of February 1, 2022, Salesforce customers are contractually required to use MFA when accessing Salesforce products, per the [Salesforce Trust and Compliance Documentation](#). In the future, Salesforce is automatically enabling and enforcing MFA for all orgs. To monitor the projected dates for the auto-enablement and enforcement milestones, see the [MFA Enforcement Roadmap](#).

**Why:** This user permission is provided solely to disable MFA for use cases that are exempt from the MFA requirement, as documented in the [Salesforce MFA FAQ](#).

Here are the MFA-exempt use cases that you must exclude on your own.

- User accounts for test automation tools, such as Selenium, Cucumber, or Appium
- User accounts for Robotic Process Automation (RPA) systems
- Logins using a certificate service that requires a PIN before users can select or receive a user certificate (for example, when logging in with a PIV or CAC card)
- Logins using a combination of a trusted device and a trusted network

**How:** Assign the Waive Multi-Factor Authentication for Exempt Users user permission via a permission set or directly on custom profiles. This permission overrides the Multi-Factor Authentication for User Interface Logins user permission and the new Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org setting.

 **Note:** Be sure to assign the Waive Multi-Factor Authentication for Exempt Users user permission for exempt use cases before Salesforce enables MFA for customers. Even if your org fully complies with the MFA requirement now, future auto-enablement and enforcement milestones will turn on MFA for these use cases unless you take steps to exclude them.

SEE ALSO:

[Salesforce MFA FAQ](#)

[MFA Enforcement Roadmap](#)

[MFA Requirement Is in Effect and Enforcement Is Coming](#)

[Salesforce Help: User Permissions](#)

[Salesforce Help: Exclude Exempt Users from MFA](#)

## Verify User Identity with WebAuthn (FIDO2) Security Keys

To meet the latest authentication standards, Salesforce now supports WebAuthn security keys. Users can register a WebAuthn or U2F security key for identity verification. To maintain compatibility with web browsers, previously registered U2F keys adopt WebAuthn APIs when used for the first time after Summer '22.

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

SEE ALSO:

[Salesforce Help: U2F or WebAuthn Security Keys as a Verification Method](#)

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

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. MFA challenges are now bypassed for users who are assigned the user permission Multi-factor Authentication for User Interface Logins and are logging in with an SSO Auth Provider. This update was first made available in Winter '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.

**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](#)

## Securely Update Email Addresses and Reset Passwords (Release Update)

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. To ensure the security of your org, users must 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 new email address became active as soon as you saved the change, bypassing verification. This update was first made available in Summer '21.

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

**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.



**Important:** If you previously disabled this update for your org by contacting customer support, contact customer support again to ensure that your org is excluded from the update. We apologize for this inconvenience.

SEE ALSO:

[Release Updates](#)

## Login Enhancements for Microsoft

Make it easy for employees and customers to log in to Salesforce by setting up single sign-on (SSO) with a Microsoft authentication provider. Your users can access your Salesforce org or Experience Cloud site with their Microsoft credentials.

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

**How:** Use the global Microsoft app provided by Salesforce or set up a custom Microsoft app. Then configure a Microsoft authentication provider using information from the app.

SEE ALSO:

[Salesforce Help: Configure a Microsoft Authentication Provider \(can be outdated or unavailable during release preview\)](#)

## Rotate the Consumer Key and Consumer Secret of a Connected App

Improve the security of your connected apps with minimal app downtime. To keep your consumer key and consumer secret fresh, you can swap them with new consumer details. Prepare for the new details by generating staged values and sharing them with your connected app integrations. When you're ready, apply the new consumer details.

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

### SEE ALSO:

[Salesforce Help: Rotate the Consumer Key and Consumer Secret of a Connected App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Authorize Apps with OAuth \(can be outdated or unavailable during release preview\)](#)

## Verify Your Identity to Access Consumer Key and Consumer Secret

To improve security, you're required to verify your identity before viewing your connected app's consumer key and consumer secret, also known as the client ID and client secret. On the connected app's Manage Connected Apps page, you must complete multi-factor authentication (MFA) using one of your registered identity verification methods before you can see the consumer details. You can view the consumer details for up to 5 minutes before you're challenged to verify your identity again.

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

### SEE ALSO:

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

[Salesforce Help: Authorize Apps with OAuth \(can be outdated or unavailable during release preview\)](#)

## Block the OAuth 2.0 Username-Password Flow at an Org-Wide Level

To keep your org secure, you can block all connected apps in your org from using the OAuth 2.0 username-password flow. We recommend blocking the flow so that developers can't use it to build new integrations. Blocking the flow can break any existing integrations that use the flow, such as managed packages and mobile apps. Before blocking the flow, audit and test your integrations so you can avoid disruptions.

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

### SEE ALSO:

[Salesforce Help: Block the OAuth 2.0 Username-Password Flow \(can be outdated or unavailable during release preview\)](#)

## Upgrade SAML Single Sign-On Framework (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This update can impact integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, even when you're using Identity for Employees or Salesforce Customer Identity, including Experience Cloud.

**Where:** This change applies to Lightning Experience and Salesforce Classic in all 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:** This maintenance update improves your org's security posture and potentially increases the platform's performance. Some SSO URLs are now encoded. For service provider-initiated SSO, the Identity Provider URL and Assertion Consumer Service (ACS) URL are

encoded. For all single logout configurations, the Single Logout Endpoint and relay state parameter are encoded. All existing SAML-based integrations are potentially impacted.

**How:** Because Salesforce uses SAML to integrate with third-party systems, this upgrade can break integrations on the third party's side. To avoid disruptions, apply this release update and test your SAML integrations.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For **Upgrade SAML Single Sign-On Framework**, follow the testing and activation steps.

SEE ALSO:

[Release Updates](#)

[Salesforce Help: Single Sign-On \(can be outdated or unavailable during release preview\)](#)

## Privacy Center

Create Consent Templates in Preference Center (beta), which is a new method for populating the preference forms where your customers indicate how they wish to be contacted.

IN THIS SECTION:

[Use Consent Templates to Create Preference Forms in Privacy Preference Center \(Beta\)](#)

Customize reusable templates that define contact preferences based on your consent channels, or brands and data use purposes. Then create preference forms that populate from the consent templates and publish your forms for customers to complete and submit.

## Use Consent Templates to Create Preference Forms in Privacy Preference Center (Beta)

Customize reusable templates that define contact preferences based on your consent channels, or brands and data use purposes. Then create preference forms that populate from the consent templates and publish your forms for customers to complete and submit.

**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 purchase the Privacy Center add-on subscription.

**How:** From the Preference Center app, select **Consent Templates**, then click **New Consent Template**. Select one of three options to create a template, then follow the prompts to customize it. From the Preference Center dashboard you can edit, activate, deactivate, and delete templates. And you can grab a code snippet to publish forms that you create to your website.

**Preference Center**  
**New Basic Consent Template**

**Object**  
Include object data in your consent template. [Edit Object](#)

\* Object  
Account ▼

[Next](#)

**Fields**  
Include up to 30 fields. [Edit Fields](#)

**Name**  
Give your consent template a name. The API name automatically populates. [Edit Name](#)

[Cancel](#) [Save](#) [Save & Activate](#)

**SEE ALSO:**

[Salesforce Help: Create Reusable Consent Templates \(can be outdated or unavailable during release preview\)](#)

## Salesforce Shield

Fine-tune Transaction Security metering and policy application controls. The Permission Set Event is now generally available. See more event data in the API Total Usage, Lightning Page View, and Transaction Security event types. And add another layer of security to data collected in Service Cloud Voice by encrypting the Participant Display Name field on the Conversation Participant object.

**IN THIS SECTION:**

### [Event Monitoring](#)

Dial in your preferred Transaction Security metering behavior preferences with a new user permission and metadata API setting. The Permission Set Event is now generally available. The API Total Usage event type supports more API versions and includes more fields. And access a wider range of detailed data with the Lightning Page View and Transaction Security event types.

### [Field Audit Trail](#)

Field Audit Trail no longer enforces the 10-year retention limit for field history data. Instead, all field history data is retained from the time that Field Audit Trail is enabled.

### [Shield Platform Encryption](#)

Add another layer of security to personally identifiable information collected in Service Cloud Voice. Shield Platform Encryption now supports the Participant Display Name field.

## Event Monitoring

Dial in your preferred Transaction Security metering behavior preferences with a new user permission and metadata API setting. The Permission Set Event is now generally available. The API Total Usage event type supports more API versions and includes more fields. And access a wider range of detailed data with the Lightning Page View and Transaction Security event types.

## IN THIS SECTION:

[Control Transaction Security Metering Behavior](#)

Keep business processes running smoothly with new metering controls. Metering is a valuable tool that prevents runaway or malicious processes from monopolizing shared resources. If long-running processes such as bulk API calls regularly cause transaction security policy evaluations to take too long, you can now bypass metering-initiated blocking at the org level. And if a specific user's actions are regularly blocked, or they're a trusted user such as an integration user, you can exempt them from Transaction Security altogether.

[Monitor Critical User Permissions \(Generally Available\)](#)

Create transaction security policies, now generally available, to monitor changes made in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create policies to notify you and block changes. You can also track multi-factor authentication for user interface logins.

[Track API Usage for API Versions 31–49](#)

Use the API Total Usage event type to monitor details of requests made from versions 31–49 of the Platform SOAP API, Platform REST API, and Bulk API. Previously, this event type monitored API usage through version 30. Using the API Total Usage event type can help you identify requests from old and unsupported API versions.

[Get More Information About Your Platform API Requests](#)

Use fields new to the API Total Usage event type to see more information about Platform SOAP, Platform REST, and Bulk API requests in one place. The `ENTITY_NAME` field identifies which objects are accessed by an API request. The `STATUS_CODE` field shows the HTTP response status code returned from an API request. These fields exist on other event types, such as the REST API event type.

[Get More Complete EPT Metrics for Your Lightning Pages](#)

Now you can see more detail about how Lightning pages perform with new effective page time (EPT) fields on the Lightning Page View event type. Use the `EFFECTIVE_PAGE_TIME_DEVIATION` field to see if a page encounters issues loading. When it does, track specific causes with the `EFFECTIVE_PAGE_TIME_DEVIATION_REASON` field. And use the `EFFECTIVE_PAGE_TIME_DEVIATION_ERROR_TYPE` field to identify if errors originate with your system or on the customer's end. Previously, if there was an effective page time deviation, the value of the `EFFECTIVE_PAGE_TIME` field was set to null or 0. These new fields give you a way to find more detail and context about slow page times so that you can plan accordingly.

[See Enhanced Transaction Security Policy Execution Details](#)

The Transaction Security event type now captures policy execution information for enhanced transaction security policies. Previously, this event only captured details about legacy transaction security policies. Use this event to see how efficient your policies are. For example, you can see how long a policy took to evaluate and if it was triggered, and then adjust your policy settings accordingly. And if you use Real-Time Event Monitoring, this enhanced transaction security policy information also populates in the PolicyOutcome and EvaluationTime fields on all objects that Transaction Security supports.

[Append Data to Event Monitoring Analytics App Datasets \(Beta\)](#)

It's no longer necessary to contact Salesforce to gain access to the configuration that appends new data to datasets. This configuration helps dataflow jobs for large datasets finish faster and take up less network bandwidth. It also prevents duplicated data across multiple datasets, which can count against your row count limits. This configuration is only available in new apps.

## Control Transaction Security Metering Behavior

Keep business processes running smoothly with new metering controls. Metering is a valuable tool that prevents runaway or malicious processes from monopolizing shared resources. If long-running processes such as bulk API calls regularly cause transaction security policy evaluations to take too long, you can now bypass metering-initiated blocking at the org level. And if a specific user's actions are regularly blocked, or they're a trusted user such as an integration user, you can exempt them from Transaction Security altogether.

**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:** To limit the impact of metering at user or org levels:

- Assign the **Exempt from Transaction Security** user permission.
- Set the `bypassMeteringBlock` field on the `EventSetting` metadata type to `true`.

Logging helps you track exactly when users are exempt from transaction security and how metering does and doesn't block user actions. View the new `ExemptNoAction`, `MeteringBlock`, and `MeteringNoAction` values on the `PolicyOutcome` field on all platform events and event storage and streaming objects that Transaction Security supports.

SEE ALSO:

[Salesforce Help: Enhanced Transaction Security Metering \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Exempt Users from Transaction Security Policies \(can be outdated or unavailable during release preview\)](#)

[Metadata API](#)

[New and Changed Standard Platform Events](#)

## Monitor Critical User Permissions (Generally Available)

Create transaction security policies, now generally available, to monitor changes made in permission sets and permission set groups. If a change doesn't comply with internal usage, compliance, or security policies, create policies to notify you and block changes. You can also track multi-factor authentication for user interface logins.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** When creating a transaction security policy using Condition Builder or Apex, select **Permission Set Event** and choose your policy conditions and actions. You can enable streaming and storing for the permission set event in the Event Manager in Setup. The event data from `PermissionSetEvent` is stored in `PermissionSetEventStore`.

You can create transaction security policies to block these user assignments.

- Manage All Data
- View All Data
- Customize Application
- Manage Encryption Keys
- Reset User Passwords and Unlock Users
- Manage Password Policies
- Manage Profiles and Permission Sets
- Assign Permission Sets
- Password Never Expires
- Manage Roles
- Manage Internal Users
- Manage Users
- Author Apex
- Manage Sharing
- Multi-Factor Authentication for User Interface Logins

Permission set events in Transaction Security don't support in-app notifications.

SEE ALSO:

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

[Platform Events Developer Guide: PermissionSetEvent \(can be outdated or unavailable during release preview\)](#)

[Platform Events Developer Guide: PermissionSetEventStore \(can be outdated or unavailable during release preview\)](#)

## Track API Usage for API Versions 31–49

Use the API Total Usage event type to monitor details of requests made from versions 31–49 of the Platform SOAP API, Platform REST API, and Bulk API. Previously, this event type monitored API usage through version 30. Using the API Total Usage event type can help you identify requests from old and unsupported API versions.

**Where:** This change applies to Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

**Who:** The API Total Usage Event is free with 24-hour data retention for all customers. Customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions enjoy a longer data retention period.

SEE ALSO:

[Salesforce Object Reference: API Total Usage \(can be outdated or unavailable during release preview\)](#)

## Get More Information About Your Platform API Requests

Use fields new to the API Total Usage event type to see more information about Platform SOAP, Platform REST, and Bulk API requests in one place. The `ENTITY_NAME` field identifies which objects are accessed by an API request. The `STATUS_CODE` field shows the HTTP response status code returned from an API request. These fields exist on other event types, such as the REST API event type.

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## Get More Complete EPT Metrics for Your Lightning Pages

Now you can see more detail about how Lightning pages perform with new effective page time (EPT) fields on the Lightning Page View event type. Use the `EFFECTIVE_PAGE_TIME_DEVIATION` field to see if a page encounters issues loading. When it does, track specific causes with the `EFFECTIVE_PAGE_TIME_DEVIATION_REASON` field. And use the `EFFECTIVE_PAGE_TIME_DEVIATION_ERROR_TYPE` field to identify if errors originate with your system or on the customer's end. Previously, if there was an effective page time deviation, the value of the `EFFECTIVE_PAGE_TIME` field was set to null or 0. These new fields give you a way to find more detail and context about slow page times so that you can plan accordingly.

**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.

SEE ALSO:

[Platform Events Developer Guide: Lightning Page View \(can be outdated or unavailable during release preview\)](#)

## See Enhanced Transaction Security Policy Execution Details

The Transaction Security event type now captures policy execution information for enhanced transaction security policies. Previously, this event only captured details about legacy transaction security policies. Use this event to see how efficient your policies are. For example, you can see how long a policy took to evaluate and if it was triggered, and then adjust your policy settings accordingly. And if you use Real-Time Event Monitoring, this enhanced transaction security policy information also populates in the PolicyOutcome and EvaluationTime fields on all objects that Transaction Security supports.

**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.

SEE ALSO:

[Platform Events Developer Guide: Transaction Security Event Type \(can be outdated or unavailable during release preview\)](#)

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

It's no longer necessary to contact Salesforce to gain access to the configuration that appends new data to datasets. This configuration helps dataflow jobs for large datasets finish faster and take up less network bandwidth. It also prevents duplicated data across multiple datasets, which can count against your row count limits. This configuration is only available in new apps.

**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:** When creating an app, in the configuration wizard, select **Add only new event log file data to existing apps?**. The app then adds only new data since the last dataset update, and it deletes all data that's dated outside of your specified retention period.

To get the new configuration, delete an app then recreate it. This new configuration isn't compatible with app reconfiguration and upgrade actions.

SEE ALSO:

[Salesforce Help: Create and Share the Event Monitoring Analytics App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Upgrade the Event Monitoring Analytics App \(can be outdated or unavailable during release preview\)](#)

## Field Audit Trail

Field Audit Trail no longer enforces the 10-year retention limit for field history data. Instead, all field history data is retained from the time that Field Audit Trail is enabled.

IN THIS SECTION:

[Updated Data Retention Limit for Field Audit Trail](#)

Field Audit Trail no longer enforces the 10-year retention limit for field history data. All field history data is retained from the time that Field Audit Trail is enabled. As always, you can manually delete retained data using the Apex or SOAP delete() method. Query your HistoryRetentionPolicy to identify data that you want to delete.

## Updated Data Retention Limit for Field Audit Trail

Field Audit Trail no longer enforces the 10-year retention limit for field history data. All field history data is retained from the time that Field Audit Trail is enabled. As always, you can manually delete retained data using the Apex or SOAP delete() method. Query your HistoryRetentionPolicy to identify data that you want to delete.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Field Audit Trail add-on subscriptions.

SEE ALSO:

[Field Audit Trail Implementation Guide: Field Audit Trail](#)

## Shield Platform Encryption

Add another layer of security to personally identifiable information collected in Service Cloud Voice. Shield Platform Encryption now supports the Participant Display Name field.

IN THIS SECTION:

[Encrypt Participant Display Names in Service Cloud Voice](#)

If you use Service Cloud Voice to connect with customers on a human level, you inevitably collect personally identifiable information (PII). Shield Platform Encryption now helps you add another layer of security to the Participant Display Name field on the ConversationParticipant object. This field supports probabilistic and case-sensitive deterministic encryption schemes.

### Encrypt Participant Display Names in Service Cloud Voice

If you use Service Cloud Voice to connect with customers on a human level, you inevitably collect personally identifiable information (PII). Shield Platform Encryption now helps you add another layer of security to the Participant Display Name field on the ConversationParticipant object. This field supports probabilistic and case-sensitive deterministic encryption schemes.

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

**Who:** This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption and Service Cloud Voice add-on subscriptions.

**How:** On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the Participant Display Name field.

SEE ALSO:

[Reinforce Customer Trust with Service Cloud Voice HIPAA Compliance Offerings](#)

[Salesforce Help: Which Standard Fields Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

## Security Center

Create more security policy types to deploy to your connected tenants. Gain insight into your security posture by monitoring metrics such as threat detection. Export your Security Center data with the click of a button. And track changes to even more metrics in Security Center.

**IN THIS SECTION:**[Deploy New Policy Types from Security Policies \(Generally Available\)](#)

Security policies are now generally available with new security policy types. You can create these security policies in Security Center: Trusted IP Ranges, Health Check Baseline, Password Configuration, and Session Settings.

[Get More Custom Report Types](#)

Create reports on Security Center permissions, logins, and monitoring metrics. These new report types make it easier to track, monitor, and view graphs of relevant Security Center data.

[See More Metrics in Security Center](#)

To simplify security policy management, you can now track changes to transaction security policies, mobile security policies, and trusted IP ranges in Security Center. You can also find existing Threat Detection metrics within the Monitoring dashboard page.

[Export Security Center Data with the Click of a Button](#)

Easily download a .csv file for tables that show your policies, alerts, and monitoring metric details to access important data whenever you need it.

## Deploy New Policy Types from Security Policies (Generally Available)


Security policies are now generally available with new security policy types. You can create these security policies in Security Center: Trusted IP Ranges, Health Check Baseline, Password Configuration, and Session Settings.

**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 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 new policy type and select the tenants that you want the policy to apply to.


### New Security Policy




**Trusted IP Ranges**  
Define trusted IP ranges for selected tenants.



**Health Check Baseline**  
Define a Health Check Baseline for selected tenants.



**Password Configuration**  
Define password requirements for selected tenants.



**Session Settings**  
Define session details and timeout values for selected tenants.

[Cancel](#)[Next](#)

SEE ALSO:

[Define and Deploy Security Policies \(can be outdated or unavailable during release preview\)](#)

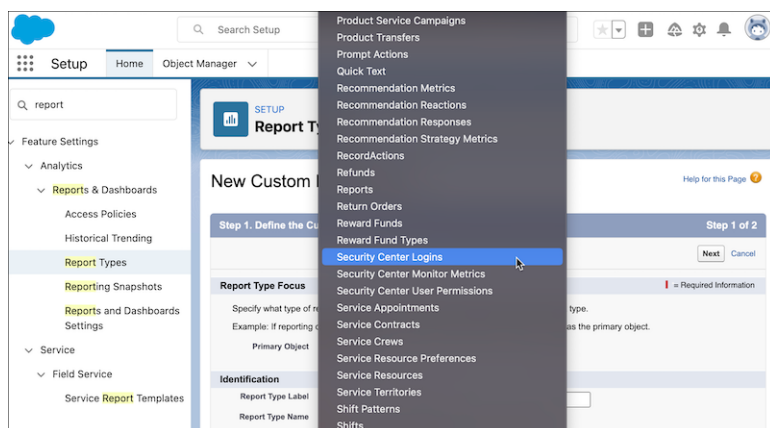
## Get More Custom Report Types

Create reports on Security Center permissions, logins, and monitoring metrics. These new report types make it easier to track, monitor, and view graphs of relevant Security Center data.

**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 Security Center add-on subscription.

**How:** Access Report Types from Setup, and click **New Custom Report Type**. Select the relevant primary object from the dropdown menu, and then finish creating your report type.



SEE ALSO:

[Manage Custom Report Types \(can be outdated or unavailable during release preview\)](#)

## See More Metrics in Security Center

To simplify security policy management, you can now track changes to transaction security policies, mobile security policies, and trusted IP ranges in Security Center. You can also find existing Threat Detection metrics within the Monitoring dashboard page.

**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 Security Center add-on subscription.

**How:** Check out the new metrics that you can monitor from your Security Center dashboard in the Configuration category under Security Overview.



SEE ALSO:

[Review Detailed Metric Data \(can be outdated or unavailable during release preview\)](#)

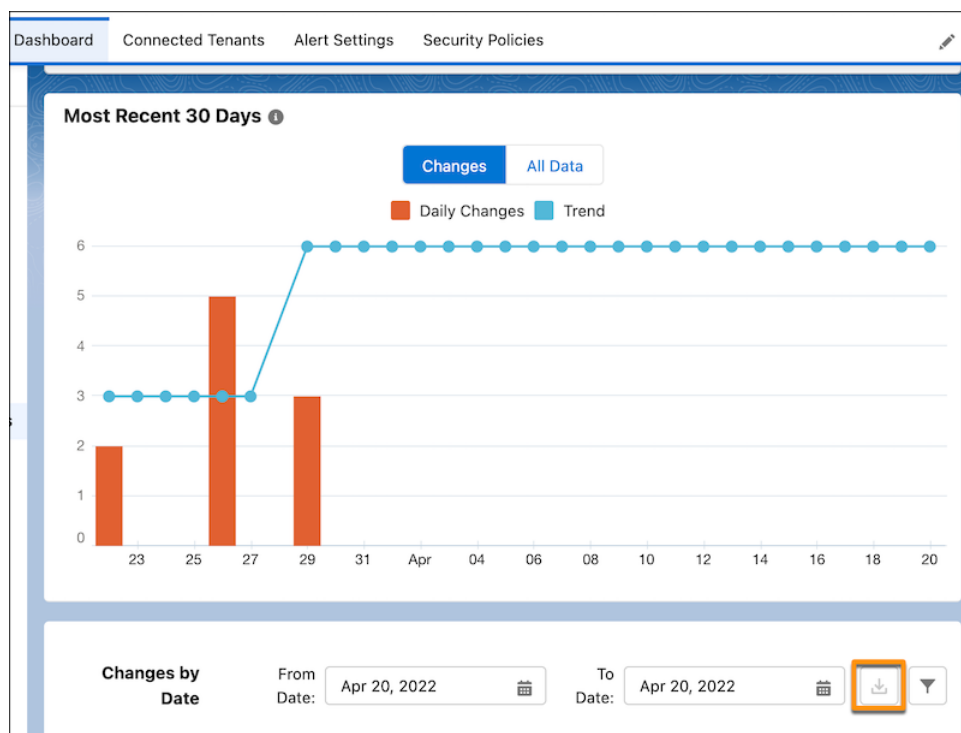
## Export Security Center Data with the Click of a Button

Easily download a .csv file for tables that show your policies, alerts, and monitoring metric details to access important data whenever you need it.

**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 Security Center add-on subscription. To download monitoring metric data, you must have an Event Monitoring license.

**How:** To download metric data, scroll to Changes by Date for the relevant Security Center dashboard page and click the download button.



SEE ALSO:

[Review Threat Detection Events \(can be outdated or unavailable during release preview\)](#)

## Other Security Changes

Validate your custom features that redirect users to a URL, and prevent users from connecting to untrusted URLs. Define Content Security Policy (CSP) Trusted Sites for your Visualforce pages, and help your users safely interact with external websites on your custom Visualforce pages with cross-origin headers. Private Connect support for AWS integrations is available in the EMEA and APAC regions. Reprovision your inbound and outbound connections before Private Connect legacy network is retired.



## IN THIS SECTION:

[Validate Your Redirects](#)

To better protect your data and users, the security checks on redirections are updated. Verify your custom features that redirect users to a URL to ensure that the process continues to work in Summer '22.

[Define CSP Trusted Sites for Visualforce Pages](#)

To safely provide your users with external content, you can now define Content Security Policy (CSP) trusted sites for your Visualforce pages.

[Allow Redirects Only to Trusted External URLs](#)

Protect your users from malicious links by allowing redirections only to external URLs that you trust. Previously, you could only warn users about a redirection.

[Protect Your Visualforce Pages with Cross-Origin Headers](#)

Help your users safely interact with external websites and content on your custom Visualforce pages with cross-origin headers. Cross-Origin Opener Policy (COOP) helps you shield these pages from external attacks. And Cross-Origin Embedder Policy (COEP) only allows content from external sources that trust your custom page.

[Secure Cross-Cloud Integrations with Private Connect Across the Globe](#)

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in the EMEA and APAC regions.

[Private Connect Legacy Network Is Being Retired](#)

The network that supports Private Connect is upgraded to Hyperforce. The legacy network will be retired on October 15, 2022 at 11:59 PM Pacific Daylight Time (America/Los\_Angeles). Reprovision your AWS PrivateLink connections before the legacy network is retired.

[CSP Trusted Sites LEX Context Option Was Renamed](#)

The LEX context option for Content Security Policy (CSP) trusted sites is now called Lightning Experience Pages.

## Validate Your Redirects

To better protect your data and users, the security checks on redirections are updated. Verify your custom features that redirect users to a URL to ensure that the process continues to work in Summer '22.

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

**How:** Common places for redirects are custom code, Visualforce pages, Experience Cloud sites, Salesforce Sites, Pardot APIs, Flows, and Marketing Cloud APIs and SDKs. To search your Salesforce code, download the metadata, and then use a command-line interface such as Salesforce CLI.

## SEE ALSO:

[Metadata API Developer Guide: Deploying and Retrieving Metadata](#) (can be outdated or unavailable during release preview)

[Salesforce CLI Setup Guide](#) (can be outdated or unavailable during release preview)

## Define CSP Trusted Sites for Visualforce Pages

To safely provide your users with external content, you can now define Content Security Policy (CSP) trusted sites for your Visualforce pages.

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

SEE ALSO:

[Apply Your Content Security Policy \(CSP\) to Visualforce Pages](#)

## Allow Redirects Only to Trusted External URLs

Protect your users from malicious links by allowing redirections only to external URLs that you trust. Previously, you could only warn users about a redirection.

**Where:** This change applies to Salesforce Classic in all editions.

**How:** On the Trusted URLs for Redirects Setup page, specify the external URLs that you trust. Then on the Session Settings Setup page, under External Redirections, select **Only trusted external URLs**.

SEE ALSO:

[Salesforce Help: Manage Redirects to External URLs \(can be outdated or unavailable during release preview\)](#)

## Protect Your Visualforce Pages with Cross-Origin Headers

Help your users safely interact with external websites and content on your custom Visualforce pages with cross-origin headers. Cross-Origin Opener Policy (COOP) helps you shield these pages from external attacks. And Cross-Origin Embedder Policy (COEP) only allows content from external sources that trust your custom page.

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

SEE ALSO:

[Protect Your Visualforce Pages with Cross-Origin Opener Policy \(COOP\)](#)

[Restrict Page Resource Requests with Cross-Origin Embedder Policy \(COEP\)](#)

## Secure Cross-Cloud Integrations with Private Connect Across the Globe

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in the EMEA and APAC regions.

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

**How:** To create a private connection between Salesforce and your data hosted within AWS, go to the Private Connect page in Setup and click **AWS Regions**.

The latest AWS regions that have direct connectivity to Salesforce data centers are:

- ap-northeast-1
- ap-southeast-2
- ap-south-1
- ca-central-1

- eu-central-1

SEE ALSO:

[Integrate AWS and Salesforce](#)

## Private Connect Legacy Network Is Being Retired

The network that supports Private Connect is upgraded to Hyperforce. The legacy network will be retired on October 15, 2022 at 11:59 PM Pacific Daylight Time (America/Los\_Angeles). Reprovision your AWS PrivateLink connections before the legacy network is retired.

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

**How:** Deprovision all inbound and outbound connections, and then reestablish the connections with AWS PrivateLink.

For each inbound and outbound connection, make a note of the service name for the region in which your VPC is hosted and the VPC endpoint ID. You need this information to reestablish the connectivity.

To deprovision a connection and release the resources, go to the Private Connect page in Setup and use the Actions field options. To reestablish the connectivity, create inbound connections and outbound connections using the service name and VPC endpoint ID you noted.

If you have any questions about reprovisioning your inbound and outbound connections, contact your Salesforce account executive.

SEE ALSO:

[Private Connect Legacy Network Layer Retirement on October 15, 2022 at 11:59 PM PDT](#)

[Salesforce Help: Secure Cross-Cloud Integrations with Private Connect](#)

## CSP Trusted Sites LEX Context Option Was Renamed

The LEX context option for Content Security Policy (CSP) trusted sites is now called Lightning Experience Pages.

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SEE ALSO:

[Salesforce Help: Manage CSP Trusted Sites \(can be outdated or unavailable during release preview\)](#)

## Service

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Take advantage of new Service Cloud features that help you and your team deliver smart, swift service. Give customers a personalized experience on your mobile app or website with Messaging for In-App and Web (generally available). Monitor disruptions in more places with third-party integrations for Incident Management. Break down team silos and speed up time to resolution with swarming on incidents, problems, and change requests in Slack. Voice call transfer enhancements and agent flags and whispers provide control and flexibility. Get Einstein Reply Recommendations in up to 16 languages, and add Einstein Article Recommendations and Case Classification to existing flows. And in Workforce Engagement, the new Intraday Management dashboard helps supervisors identify and resolve unexpected staffing gaps and schedule adherence discrepancies.

**IN THIS SECTION:**[Case Management](#)

Get the improved entitlements experience with enhancements to milestone timers and entitlement processes.

[Channels](#)

Harness the power of Messaging for In-App and Web and deliver a better conversation experience for customers on your mobile app or website. Voice transfer enhancements, agent flags and whispers, and supervisor barge-in provide more control and flexibility for your customers and agents.

[Routing](#)

Enable conversations between agents and supervisors with whisper messages and flag raises in enhanced channels. Route work more intelligently based on agent availability. Customize the agent experience in Omni-Channel with custom sound alerts and auto accept for newly assigned work.

[Einstein for Service](#)

Go global with multi-language Reply Recommendations. Deflect cases and improve case handling time by integrating Case Classification and Article Recommendations with Flows. Try Article Recommendations for Conversations. Build bots faster using your own bot templates. Build rich conversational experiences with enhanced bots, which include support for more flexible routing and rich content. And, use the upgraded Einstein Bots API and Java SDK to launch bots using the channels and languages that your customers need.

[Workforce Engagement](#)

Give planners oversight into today's shift activities for each agent. React to overstaffing, understaffing, or schedule assignment issues by editing shift activities in real time. Give agents a place to view schedule details, auto-receive emails about changes to assigned shifts, and approve or reject shifts. Omni-Channel Plan is renamed to Capacity Plan.

[Incident Management](#)

When an urgent incident affects your customers, use Incident Management to eliminate potential complications before they become showstoppers. Employ out-of-the-box flows to automate your incident resolutions. Break down team silos and speed up time to resolution with swarming on incidents, problems, and change requests in Slack. Monitor disruptions in more places with third-party integrations and out-of-the-box reporting.

[Other Changes](#)

Learn about other changes we've made in the Service Cloud.

## Case Management

Get the improved entitlements experience with enhancements to milestone timers and entitlement processes.

**IN THIS SECTION:**[Entitlement Management](#)

Track your service-level agreements (SLAs) better than ever with milestone timer and entitlement process enhancements.

## Entitlement Management

Track your service-level agreements (SLAs) better than ever with milestone timer and entitlement process enhancements.

#### IN THIS SECTION:

##### [Get the Improved Entitlements and Milestones Experience](#)

Improve your service-level agreement (SLA) reporting experience and provide excellent customer service with enhanced milestone timers and changes to the entitlement process entry and reentry behavior.

## Get the Improved Entitlements and Milestones Experience

Improve your service-level agreement (SLA) reporting experience and provide excellent customer service with enhanced milestone timers and changes to the entitlement process entry and reentry behavior.

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

**How:** The milestone timer now stops when a record exits the entitlement process. It's no longer necessary to stop the milestone timer manually by selecting Is Stopped.

The milestone timer stops based on the first action taken to stop it and not the most recent one. For example, if a record exits the entitlement process, but a user clicks Is Stopped afterwards, the milestone timer is stopped at the time that the entitlement exits and not when Is Stopped is selected. If the record reenters the entitlement process, the timer resumes from the time that the record exited the entitlement process.

## Channels

Harness the power of Messaging for In-App and Web and deliver a better conversation experience for customers on your mobile app or website. Voice transfer enhancements, agent flags and whispers, and supervisor barge-in provide more control and flexibility for your customers and agents.

#### IN THIS SECTION:

##### [Messaging](#)

Give customers a personalized experience on your mobile app or website with Messaging for In-App and Web. This embedded messaging channel provides a robust experience with enhanced functionality and fewer dropped conversations. Full developer documentation is provided for mobile and web to get you up and running. WhatsApp numbers can now be moved to Salesforce Messaging from other business service providers, and pricing changes can affect charges for WhatsApp messaging sessions. And to stay oriented during planning, setup, and customization, check out the new Messaging learning maps.

##### [Voice](#)

Improve the agent experience with voice call transfer enhancements and Contact Lens transcriptions now generally available. And agents can easily get supervisor support with agent flags and whispers.

## Messaging

Give customers a personalized experience on your mobile app or website with Messaging for In-App and Web. This embedded messaging channel provides a robust experience with enhanced functionality and fewer dropped conversations. Full developer documentation is provided for mobile and web to get you up and running. WhatsApp numbers can now be moved to Salesforce Messaging from other business service providers, and pricing changes can affect charges for WhatsApp messaging sessions. And to stay oriented during planning, setup, and customization, check out the new Messaging learning maps.

## IN THIS SECTION:

[Add Flexibility and Power with Messaging for In-App and Web \(Generally Available\)](#)

Start a new conversation with customers on your mobile app or website. Messaging for In-App and Web delivers enhanced pre-chat support to pinpoint customer needs and access records before the agent connects in the Service Console. Custom branding options and mobile push notifications provide a modern experience.

[Start with the Messaging for In-App and Web Learning Map](#)

Are you ready to begin your journey? Find all the content resources you need in one spot. Discover planning questions and a feature checklist. Understand and navigate the setup requirements for your new messaging channel. This learning map is your first stop.

[Customize Your Mobile App Messaging Experience](#)

Learn how to quickly embed messaging into your iOS or Android mobile app using the developer guide and sample code for Messaging for In-App. With just a few lines of code, add the messaging experience to your app.

[Connect Messaging for Web to an Experience Site \(Generally Available\)](#)

Add the Embedded Messaging component to your Aura site to start a conversation with customers. The component provides a quick connection point to leverage Messaging for Web features.

[Add an Enhanced Bot to Messaging for In-App and Web](#)

Create an enhanced bot for your Messaging for In-App or Web channels to ease the load for service agents and leverage flexible routing with Omni-Channel Flow.

[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. 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.

[Make Sure Agents Don't Miss Incoming Messages with an Orange Tab](#)

Agents are notified of a new incoming message when the tab for a Messaging Session record turns orange. The incoming conversation update can be from a customer or a fellow Salesforce user who isn't the agent. The tab turns white after the agent responds with a message.

[Learn About Pricing Changes for WhatsApp Messaging Channels](#)

If you have a WhatsApp channel in Salesforce Messaging, take a moment to review changes to the way you're charged for WhatsApp conversations.

[Stay on Track with the Messaging Learning Map](#)

Whether you're new to Messaging or consider yourself a Messaging aficionado, bookmark the new Messaging learning map. The learning map guides you through planning, creating, customizing, and monitoring messaging channels for your business. It's your one-stop shop for help topics, developer documentation, and other Messaging resources.

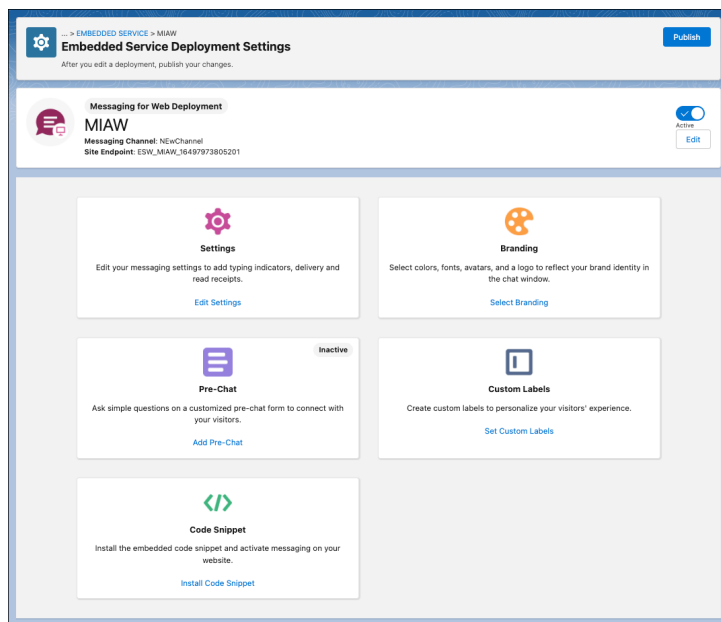
## Add Flexibility and Power with Messaging for In-App and Web (Generally Available)

Start a new conversation with customers on your mobile app or website. Messaging for In-App and Web delivers enhanced pre-chat support to pinpoint customer needs and access records before the agent connects in the Service Console. Custom branding options and mobile push notifications provide a modern experience.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** Messaging for In-App and Web will be available starting June 15, 2022.

**How:** Set up Messaging for In-App or Web by preparing a Salesforce org with Omni-Channel and an optional Omni-Channel Flow. Add a messaging channel and configure an Embedded Service deployment. Try an optional pre-chat form to pass data to agents. Include a bot or push notifications depending on your specific requirements.



SEE ALSO:

[Salesforce Help: Reimagine Messaging for Mobile Apps and Websites \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Add Flexibility and Power with Embedded Messaging \(can be outdated or unavailable during release preview\)](#)

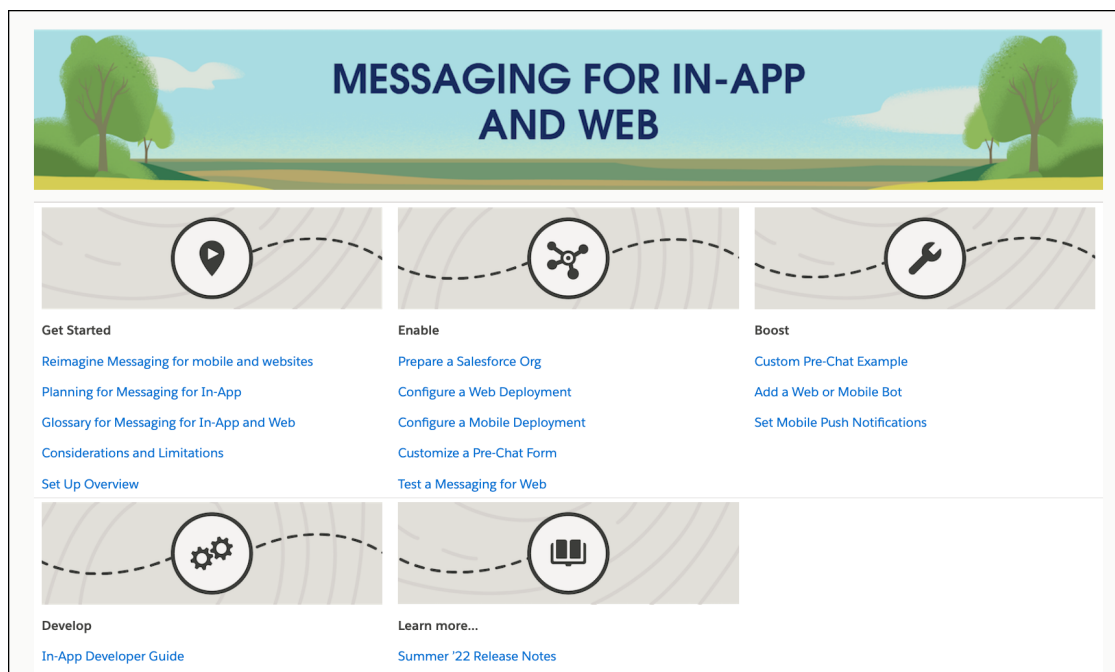
## Start with the Messaging for In-App and Web Learning Map

Are you ready to begin your journey? Find all the content resources you need in one spot. Discover planning questions and a feature checklist. Understand and navigate the setup requirements for your new messaging channel. This learning map is your first stop.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** Messaging for In-App and Web will be available starting June 15, 2022.

**How:** Start your journey with the learning map.



## SEE ALSO:

[Salesforce Help: Add Flexibility and Power with Embedded Messaging \(can be outdated or unavailable during release preview\)](#)

## Customize Your Mobile App Messaging Experience

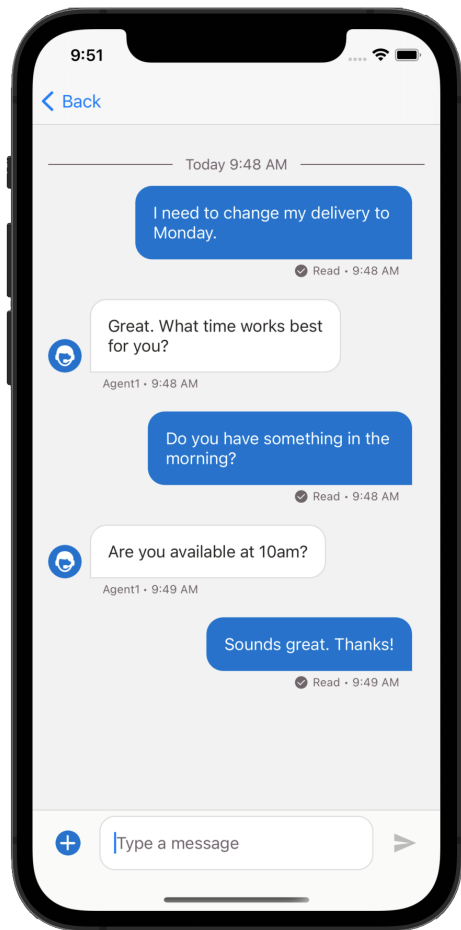
Learn how to quickly embed messaging into your iOS or Android mobile app using the developer guide and sample code for Messaging for In-App. With just a few lines of code, add the messaging experience to your app.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** Messaging for In-App will be available starting June 15, 2022.

**How:** In this developer guide, we walk you through the process of customizing the colors and all the UI text so that messaging looks and feels like your app and your brand. Also, we provide a lower-level SDK in case you want to build your user experience from the ground up.





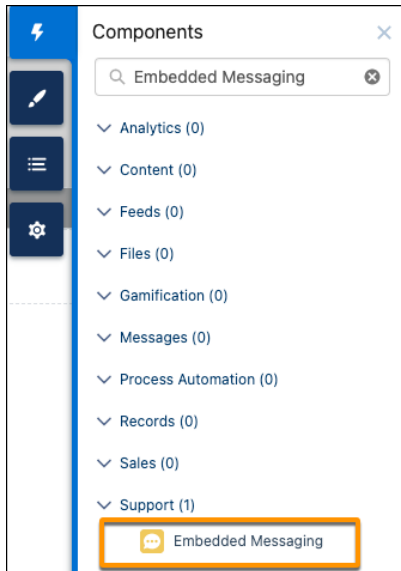
## Connect Messaging for Web to an Experience Site (Generally Available)

Add the Embedded Messaging component to your Aura site to start a conversation with customers. The component provides a quick connection point to leverage Messaging for Web features.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** Messaging for In-App will be available starting June 15, 2022.

**How:** After completing Messaging for Web setup, drag Embedded Messaging to your site from the Experience Builder Components panel. Set your Embedded Deployment and Enhanced Service URL. Remove Embedded Service Chat or Channel Menu components if you're using them on your site.



SEE ALSO:

[Add Messaging for Web to an Experience Site \(Generally Available\)](#)

[Embedded Messaging](#)

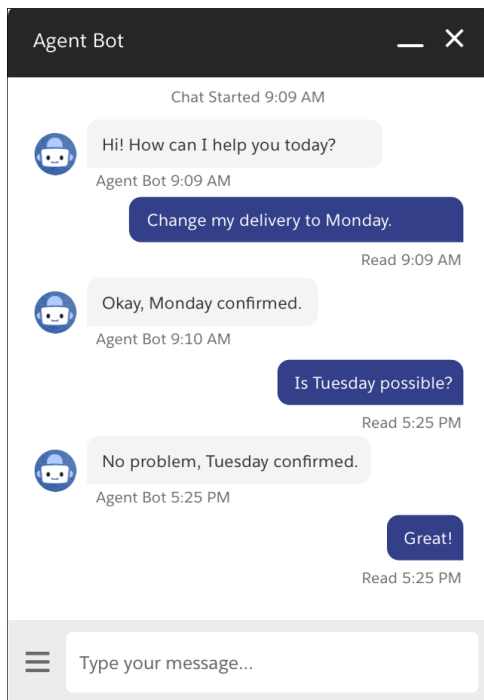
## Add an Enhanced Bot to Messaging for In-App and Web

Create an enhanced bot for your Messaging for In-App or Web channels to ease the load for service agents and leverage flexible routing with Omni-Channel Flow.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** You can begin building and testing enhanced bots when Summer '22 rolls out to your org. You can connect your bot to enhanced channels when Messaging for In-App and Web is available beginning June 15, 2022.

**Why:** You can also use bots to send rich content, such as links, images, and files, without any workarounds.

**SEE ALSO:**

[Upgrade Your Conversational Experiences with Enhanced Bots \(Generally Available\)](#)

## 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. 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.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions in Service Cloud.

**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.

**SEE ALSO:**

[Salesforce Help: Create a WhatsApp Messaging Channel \(can be outdated or unavailable during release preview\)](#)

## Make Sure Agents Don't Miss Incoming Messages with an Orange Tab

Agents are notified of a new incoming message when the tab for a Messaging Session record turns orange. The incoming conversation update can be from a customer or a fellow Salesforce user who isn't the agent. The tab turns white after the agent responds with a message.

**Where:** This change applies to Enterprise edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

**When:** Messaging for In-App and Web will be available starting June 15, 2022.

**How:** This feature is automatically activated.

## Learn About Pricing Changes for WhatsApp Messaging Channels

If you have a WhatsApp channel in Salesforce Messaging, take a moment to review changes to the way you're charged for WhatsApp conversations.

**Where:** This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions in Service Cloud.

**Why:** These pricing changes are part of WhatsApp's shift to a conversation-based model. Here are the main changes:

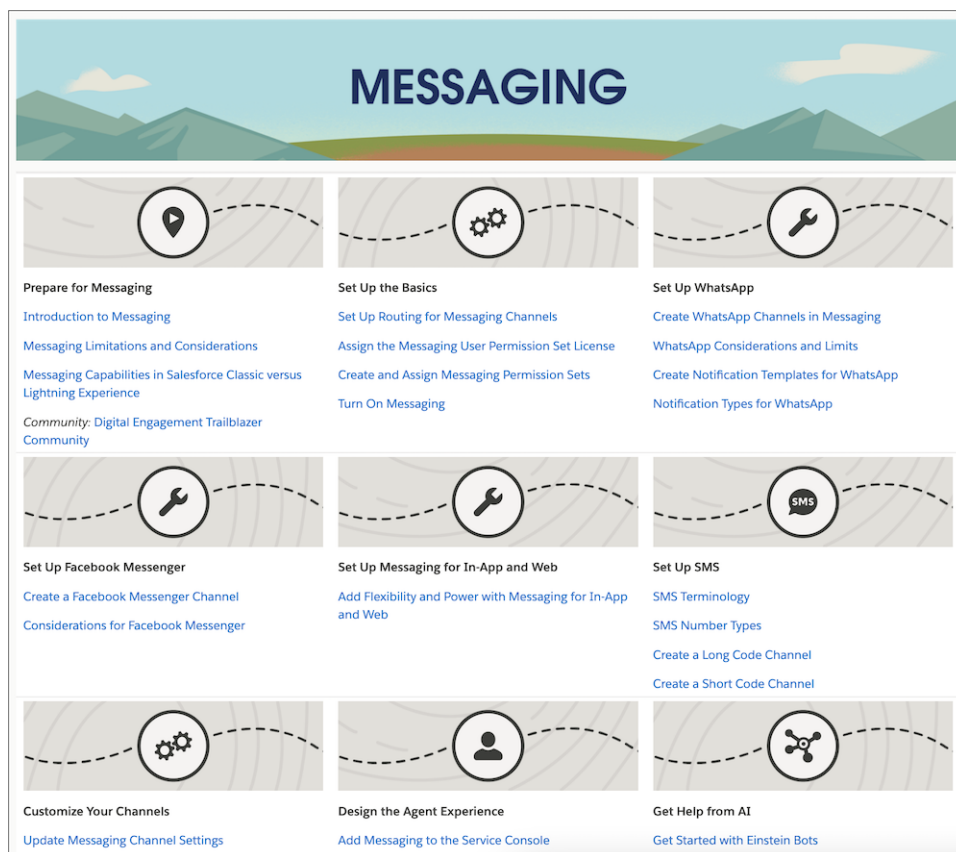
- The Digital Engagement SKU no longer includes unlimited customer-initiated WhatsApp conversations.
- The 25 SMS conversations per user per month that are included in the Digital Engagement SKU can now be applied to either SMS or WhatsApp conversations. If more WhatsApp conversations are needed, you can purchase an add-on license.
- Whenever a customer initiates a WhatsApp conversation with your business, one WhatsApp conversation allowance is used. The conversation is considered closed when the agent or customer ends the conversation.

**How:** To learn more about the Summer '22 WhatsApp pricing changes, contact your Salesforce account executive. Look for emails from Salesforce with more information about the changes.

## Stay on Track with the Messaging Learning Map

Whether you're new to Messaging or consider yourself a Messaging aficionado, bookmark the new Messaging learning map. The learning map guides you through planning, creating, customizing, and monitoring messaging channels for your business. It's your one-stop shop for help topics, developer documentation, and other Messaging resources.

**How:** Start your journey: [Messaging Learning Map](#) (can be outdated or unavailable during release preview).



## Voice

Improve the agent experience with voice call transfer enhancements and Contact Lens transcriptions now generally available. And agents can easily get supervisor support with agent flags and whispers.

### IN THIS SECTION:

#### [Transfer Calls More Efficiently](#)

Get the enhanced call transfer experience. With Omni-Channel Flow, agents can streamline the customer experience and transfer the caller to a flow. With new transfer filters, agents save time scrolling and can transfer a voice call based on a category, such as Agent or Queue, or by agent availability. Agents save time with transfer favorites that let them mark agents that they transfer to frequently as favorites. With blind transfers now supported in Service Cloud Voice with Partner Telephony, agents can choose whether to start a conference or to transfer the call without context. And with click-to-call, agents on the phone have more flexibility and can choose to skip the Omni-Channel transfer experience, and instead click any phone number in Salesforce to initiate a transfer.

#### [Manage Caller Escalations with Supervisor Barge-In](#)

Make it easier for supervisors to intervene when a call escalates with barge-in functionality added to Call Monitoring in Omni Supervisor. Supervisors can listen to an ongoing call from Omni Supervisor and join it to quickly assist an agent.

#### [Assist Agents in Real Time with Agent Flags](#)

Real-time supervisor monitoring lets agents raise a flag while on a call to alert their supervisor when they need immediate help. To resolve an issue, the supervisor can discreetly message the agent. Data from the correspondence is stored in the transcript for easy reference.

### [Use Service Cloud Voice with an Existing Amazon Connect Instance](#)

Service Cloud Voice with Partner Telephony from Amazon Connect users can now choose whether to create an Amazon Connect instance or reuse an existing one when you create a contact center in Salesforce.

### [Improve Transcriptions with Contact Lens for Amazon Connect \(Generally Available\)](#)

To transcribe calls longer than 15 minutes, Service Cloud Voice now supports Amazon Connect's Contact Lens. Now you have two transcription options. You can stick with the existing transcription option—Amazon Transcribe, which has a time limitation. Or, you can use Contact Lens. This feature, which is now generally available, includes some enhancements since the pilot release.

### [Make More Calls with Service Cloud Voice](#)

Scale your contact center's call capacity with 7,000 concurrent voice calls and 1,400 utterances per second now available for Service Cloud Voice. Agents can meet the demands of your business and better serve your customers.

### [Minimize Disruptions with Improved Presence Status Syncing for Voice Calls](#)

Keep an agent's Omni-Channel presence status in sync with other platforms and features such as Amazon Connect and After Call Work. If an agent's status isn't in sync, they now see a message in Omni-Channel that allows them to resync it before the next voice call comes in. Service Cloud Voice now also checks whether an agent should be in After Call Work and compares it to their presence status. If their Omni presence status is out of sync, the agent is removed from After Call Work and their Omni presence status is reset to Online.

### [Reinforce Customer Trust with Service Cloud Voice HIPAA Compliance Offerings](#)

To increase trust with your customers, Service Cloud Voice is now covered under the Health Insurance Portability and Accountability Act (HIPAA). HIPAA ensures that all personally identifiable information maintained by healthcare organizations, including voice call transcripts and phone numbers, is protected from fraud and theft.

### [Make and Answer Voice Calls from a Virtual Desktop](#)

Now virtual desktop agents can stream voice call audio and communicate with callers remotely from a Remote Media mode. With the Remote Media mode page open on their desktop, agents can seamlessly listen to and talk in voice calls.

### [Refresh or Create a Sandbox Org and Link it to an Amazon Connect Instance](#)

Refresh or create a sandbox org and link it to an Amazon Connect instance using sandbox templates and Metadata API.

### [Keep Your Contact Center Secure with Amazon's Virtual Private Cloud](#)

Get the benefits of Amazon's Virtual Private Cloud (VPC) to logically isolate your contact center environment for improved security. This feature applies in Salesforce with the Service Cloud Voice with the Amazon Connect telephony model. Previously, this feature was supported only for Voice with Partner Telephony and Voice with Partner Telephony from Amazon Connect telephony models.

### [Update Your Contact Center to Access Universal Call Recording](#)

Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony customers must update their contact centers to version 8.0 to use the call recording feature.

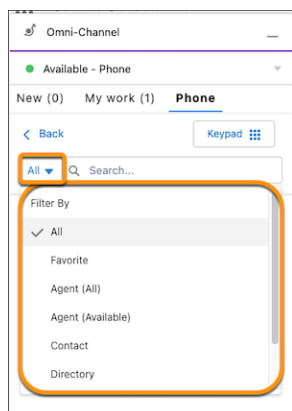
### [Give Your Developers the Latest Service Cloud Voice Features](#)

The latest Service Cloud Voice features are at your developers' fingertips with the enhancements introduced in this release. Use the API to transfer and route calls, determine call duration, use a headset OEM, and more.

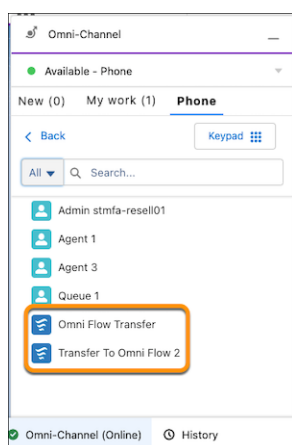
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**How:** Access transfer filters from the Phone tab of Omni-Channel. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect.



Transfer a caller to a flow from the Phone tab of Omni-Channel. Available to users with Service Cloud Voice with Amazon Connect, Service Cloud Voice with Partner Telephony, and Service Cloud Voice with Partner Telephony from Amazon Connect.



SEE ALSO:

[Salesforce Help: Add Callers or Transfer Calls \(can be outdated or unavailable during release preview\)](#)

## Manage Caller Escalations with Supervisor Barge-In

Make it easier for supervisors to intervene when a call escalates with barge-in functionality added to Call Monitoring in Omni Supervisor. Supervisors can listen to an ongoing call from Omni Supervisor and join it to quickly assist an agent.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce with this [telephony model](#):

- Service Cloud Voice with Partner Telephony

**How:** To barge in to a call, from Omni Supervisor, expand a call and click **Monitor**. When a supervisor barges in to the call, the agent is notified but the customer isn't.

SEE ALSO:

[Salesforce Help: Interrupt a Voice Call with Supervisor Barge-In \(can be outdated or unavailable during release preview\)](#)

## Assist Agents in Real Time with Agent Flags

Real-time supervisor monitoring lets agents raise a flag while on a call to alert their supervisor when they need immediate help. To resolve an issue, the supervisor can discreetly message the agent. Data from the correspondence is stored in the transcript for easy reference.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud. This feature is for all service channels, including phone, chat, and messaging. Omni-Channel, Call Controls, and Messaging will all have similar alerts.

## Use Service Cloud Voice with an Existing Amazon Connect Instance

Service Cloud Voice with Partner Telephony from Amazon Connect users can now choose whether to create an Amazon Connect instance or reuse an existing one when you create a contact center in Salesforce.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce with this [telephony model](#):

- Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** When you create a contact center in Salesforce, select Use an existing Amazon Connect instance, and upload your XML definition file. To keep your Lambdas and key pairs up to date, install the ServiceCloudVoiceLambdas serverless application.

## Improve Transcriptions with Contact Lens for Amazon Connect (Generally Available)

To transcribe calls longer than 15 minutes, Service Cloud Voice now supports Amazon Connect's Contact Lens. Now you have two transcription options. You can stick with the existing transcription option—Amazon Transcribe, which has a time limitation. Or, you can use Contact Lens. This feature, which is now generally available, includes some enhancements since the pilot release.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce with these [telephony models](#):

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**How:** Verify that your contact center is updated to version 9.0. 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 plus the Using Contact Lens suffix, such as Inbound Flow with



Transcription Using Contact Lens. If you use existing flows, remove the kvsConsumerTrigger block and enable Contact Lens real-time analytics in your recording block.

This generally available version contains these enhancements to the previous pilot version.

- Contact Lens transcripts support transferred calls.
- Contact Lens transcripts support custom vocabulary.

SEE ALSO:

[Salesforce Help: Transcribe Longer Calls with Contact Lens \(can be outdated or unavailable during release preview\)](#)

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

## Make More Calls with Service Cloud Voice

Scale your contact center's call capacity with 7,000 concurrent voice calls and 1,400 utterances per second now available for Service Cloud Voice. Agents can meet the demands of your business and better serve your customers.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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

**When:** Increased call limits are available starting June 30th, 2022.

**How:** When a contact center reaches 7,000 concurrent voice calls, calls can still come through, but some calls may not be fully transcribed.

SEE ALSO:

[Salesforce Help: Service Cloud Voice Limits and Limitations \(can be outdated or unavailable during release preview\)](#)

## Minimize Disruptions with Improved Presence Status Syncing for Voice Calls

Keep an agent's Omni-Channel presence status in sync with other platforms and features such as Amazon Connect and After Call Work. If an agent's status isn't in sync, they now see a message in Omni-Channel that allows them to resync it before the next voice call comes in. Service Cloud Voice now also checks whether an agent should be in After Call Work and compares it to their presence status. If their Omni presence status is out of sync, the agent is removed from After Call Work and their Omni presence status is reset to Online.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce with these [telephony models](#):

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

## Reinforce Customer Trust with Service Cloud Voice HIPAA Compliance Offerings

To increase trust with your customers, Service Cloud Voice is now covered under the Health Insurance Portability and Accountability Act (HIPAA). HIPAA ensures that all personally identifiable information maintained by healthcare organizations, including voice call transcripts and phone numbers, is protected from fraud and theft.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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:** Use Shield Platform Encryption to comply with HIPAA regulations on storing your sensitive Service Cloud Voice information. With Shield Platform Encryption, you can add another layer of protection to data at rest while preserving critical business functionality.

SEE ALSO:

[Encrypt Participant Display Names in Service Cloud Voice](#)

## Make and Answer Voice Calls from a Virtual Desktop

Now virtual desktop agents can stream voice call audio and communicate with callers remotely from a Remote Media mode. With the Remote Media mode page open on their desktop, agents can seamlessly listen to and talk in voice calls.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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:** The Remote Media for Virtual Desktop user permission is automatically added to the Contact Center Agent and Contact Center Admin and is off by default. Your users can interact with callers remotely after you clone the permission set, enable the user permission, and assign it to virtual desktop users.

SEE ALSO:

[Salesforce Help: Set Up Voice Call Audio for Virtual Desktop Users \(can be outdated or unavailable during release preview\)](#)

## Refresh or Create a Sandbox Org and Link it to an Amazon Connect Instance

Refresh or create a sandbox org and link it to an Amazon Connect instance using sandbox templates and Metadata API.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce with these [telephony models](#):

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

**How:** Use the [sandbox template](#) to refresh or create a sandbox org for Service Cloud Voice. After you refresh or create the sandbox org, use [Metadata API](#) to link the org to an existing AWS account or contact center. For example, you can refresh a sandbox org with Service Cloud Voice and link it to the same Amazon Connect instance, or hook it up to a completely different instance.

## Keep Your Contact Center Secure with Amazon's Virtual Private Cloud

Get the benefits of Amazon's Virtual Private Cloud (VPC) to logically isolate your contact center environment for improved security. This feature applies in Salesforce with the Service Cloud Voice with the Amazon Connect telephony model. Previously, this feature was supported only for Voice with Partner Telephony and Voice with Partner Telephony from Amazon Connect telephony models.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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:

[Amazon Virtual Private Cloud \(Amazon VPC\)](#)

## Update Your Contact Center to Access Universal Call Recording

Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony customers must update their contact centers to version 8.0 to use the call recording feature.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect are available as an add-on license in Government Cloud.

**How:** Version 8.0 is released with R2B, so Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony customers must wait until they can update their contact centers to use universal call recording. But Service Cloud Voice with Partner Telephony from Amazon Connect customers can use the feature anytime.

## Give Your Developers the Latest Service Cloud Voice Features

The latest Service Cloud Voice features are at your developers' fingertips with the enhancements introduced in this release. Use the API to transfer and route calls, determine call duration, use a headset OEM, and more.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce 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:**

- Determine the length of a voice call recording. The new `totalRecordingDuration` parameter in the Update a Voice Call Record [Telephony Integration REST API](#) represents the total time in seconds of a voice call.
- Know how the total duration of a voice call is calculated. The `DurationInSeconds` field of the `VoiceCallRecording` object calculates the voice call duration based on the parameters that are passed with the Post-Call Update [Telephony Integration REST API](#). These parameters include `agentInteractionDuration`, `totalHoldDuration`, and `totalRecordingDuration`.
- Launch a blind transfer flow. Use the `addParticipant` API to hang up and transfer a call rather than add a caller to an existing conversation. (Partner Telephony customers only.)
- Let supervisors join calls that are in progress. Use the new Supervisor Barge-In API. (Partner Telephony customers only.)
- Transfer and route calls based on routing logic. Use an Omni-Channel flow to transfer and route calls to agents or queues based on your routing logic.

## Routing

Enable conversations between agents and supervisors with whisper messages and flag raises in enhanced channels. Route work more intelligently based on agent availability. Customize the agent experience in Omni-Channel with custom sound alerts and auto accept for newly assigned work.

### IN THIS SECTION:

#### [Raise Flags and Whisper in More Channels](#)

The Phone, Messaging for In-App, and Messaging for Web enhanced channels support flag raises and whisper messages. For example, an agent can raise a flag to get their supervisor's attention, chat with them with two-way messaging, and then ask them to join the call to help resolve a complicated customer issue. Previously, only the Service Chat standard channel supported agents raising flags and supervisors sending one-way messages to agents.

#### [Make Smarter Routing Decisions by Checking Agent Availability](#)

Based on the specified routing rules—whether routing directly to an agent, a queue, or a skill—collect information about your organization's capacity to handle new work requests at a given time. Add the Check Availability for Routing action to an Omni-Channel flow to determine the number of agents online and the number of work items waiting to be picked up for the specified routing requirements, including routing type and parameters. You can then build routing logic based on the results. For example, if the agent has more than five backlogged work items in their queue, you can route work to another queue.

#### [Customize the Agent Experience with Omni-Channel Alert Sounds](#)

Define custom sounds to notify agents when work is routed to them in Omni-Channel. You can play a different sound for each service channel or group of agents. For example, to differentiate the type of work, you can play a ringing sound for incoming calls and a ta-dah sound for incoming messages.

#### [Control Routing with Refined Auto Accept](#)

When Auto Accept is enabled, incoming work items are automatically assigned to the agent. Now, you can enable this feature at the service channel level and have more control of it. For example, you can enable Auto Accept for phone calls but not chats. Previously, you could only enable Auto Accept for all agents assigned to a presence configuration.


#### [Connect Your Customers to a Bot with Omni-Channel Flow \(Generally Available\)](#)

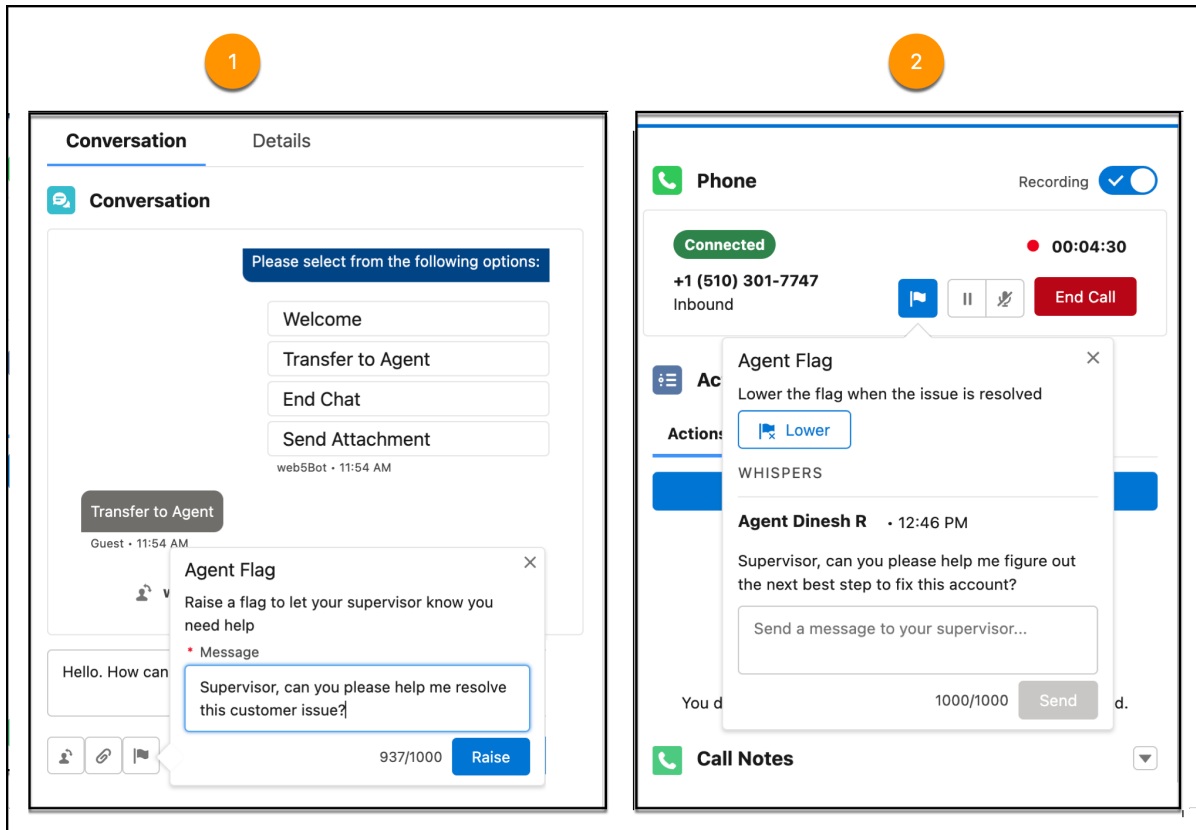
Omni-Channel Flow supports routing to and from Enhanced Bots, now generally available, on Messaging for In-App and Messaging for Web channels. Add business rules to a flow to send a conversation to a bot or an agent based on your criteria. Use flows and the Bot Builder to set up transfers from a bot to another bot, agent, queue, or skill.

## Raise Flags and Whisper in More Channels

The Phone, Messaging for In-App, and Messaging for Web enhanced channels support flag raises and whisper messages. For example, an agent can raise a flag to get their supervisor's attention, chat with them with two-way messaging, and then ask them to join the call to help resolve a complicated customer issue. Previously, only the Service Chat standard channel supported agents raising flags and supervisors sending one-way messages to agents.

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

**How:** Agents can click  to raise a flag and enter a whisper message.



The flag and whisper message appear in the Conversation component (1) for messaging sessions and Call Controls (2) and Omni-Channel widget for calls.

The enhanced monitoring experience in Omni Supervisor shows raised flags and enables supervisors to send inline whisper messages to agents.

The screenshot displays the Salesforce SCV console interface. At the top, there are tabs for 'scv console', 'Omni Supervisor', and three active call windows labeled 'VC-00001010', 'VC-00001028', and 'VC-00001029'. Below the tabs, the 'Agents' section is active, showing a table of agent summaries. The table has columns for AGENT, STATUS, FLAG, ACTION, WORK SUMMARY, STATE, LOGIN, ACCEPT, CAPACITY, ACW, WORKLOAD, CHANNELS, and ASSIGNED QUEUES. One agent, Dinesh Rohra, is listed as 'Available' with a 'Monitor' flag and a 'Lower Flag' action. A call transcript overlay is visible on the right, showing a conversation between an agent and a supervisor. The transcript includes a message from the agent: 'Supervisor, can you help me figure out t...' and a response from the supervisor: 'Mhm. Agent - 1:02 PM'. A 'Lower Flag' button is also present in the transcript overlay.

SEE ALSO:

[Salesforce Help: Support and Train Your Agents \(can be outdated or unavailable during release preview\)](#)

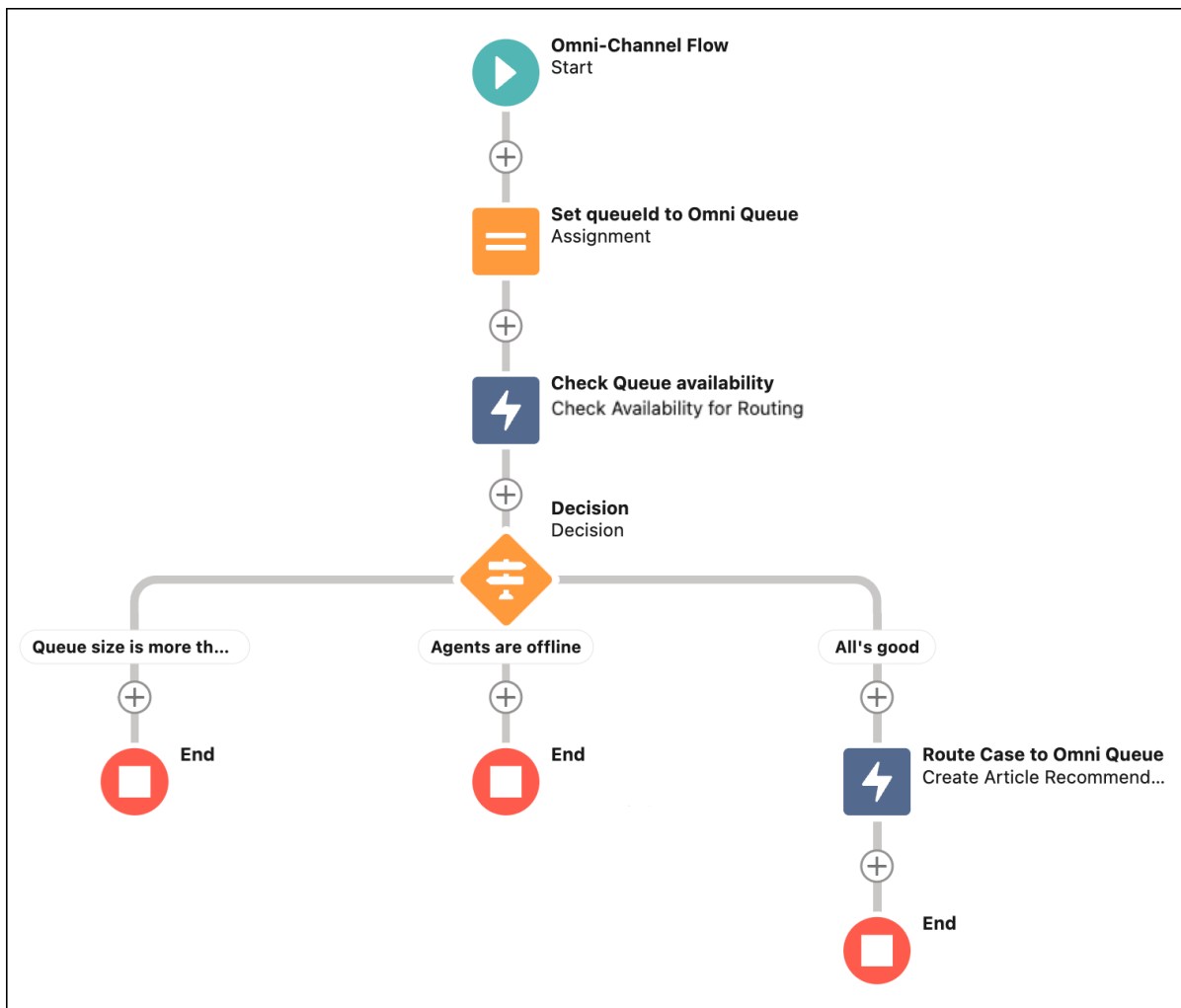
[Salesforce Help: Get Help from a Supervisor \(can be outdated or unavailable during release preview\)](#)

## Make Smarter Routing Decisions by Checking Agent Availability

Based on the specified routing rules—whether routing directly to an agent, a queue, or a skill—collect information about your organization's capacity to handle new work requests at a given time. Add the Check Availability for Routing action to an Omni-Channel flow to determine the number of agents online and the number of work items waiting to be picked up for the specified routing requirements, including routing type and parameters. You can then build routing logic based on the results. For example, if the agent has more than five backlogged work items in their queue, you can route work to another queue.

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

**How:** Here's an example of how to use this feature. To determine whether to route cases to a queue based on the results of the Check Availability for Routing action, add a Decision element. In the element, define the expected behavior for each condition. For instance, if at least one agent is online and the queue size is less than or equal to 10, route cases to the queue using a Route Work action. This screenshot shows three possible conditions, where each has a different routing behavior.



## SEE ALSO:

[Salesforce Help: Make Smarter Routing Decisions by Checking Agent Availability](#) (can be outdated or unavailable during release preview)

## Customize the Agent Experience with Omni-Channel Alert Sounds

Define custom sounds to notify agents when work is routed to them in Omni-Channel. You can play a different sound for each service channel or group of agents. For example, to differentiate the type of work, you can play a ringing sound for incoming calls and a ta-dah sound for incoming messages.

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

**How:** You can set up the sound notification in the presence configuration for a group of agents or in a service channel. The sound notification at the service channel level overrides the setting at the presence configuration level. When you set up the sound configuration, select the default sound or add a custom sound based on an audio file. You can also specify how long the sound plays.

Setup Home Object Manager

Presence

Feature Settings

Service

Omni-Channel

Presence Configurations

Presence Decline Reasons

Presence Statuses

Didn't find what you're looking for?  
Try using Global Search.

## Presence Configurations

Define how much work agents can accept and which Omni-Channel features they can access.

With Presence Configurations, you can specify your agents' overall capacity for work items—that is, the amount assignments.

Save Cancel

### Basic Information

Presence Configuration Name Customer Support Cas

Developer Name Customer\_Support\_Ca

Capacity 20

Automatically accept work requests ☐

Allow agents to decline work requests ☐

Update Status on Decline

Allow agents to choose a decline reason ☐

Update Status on Push Timeout

### Audio Settings

Play a notification sound for work requests ☒

Notification Sound

Default ☒

Custom sound ☐

Sound Length (Seconds) 20

Maximum: 30

Play a notification sound if Omni Channel loses connection ☒

SEE ALSO:

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

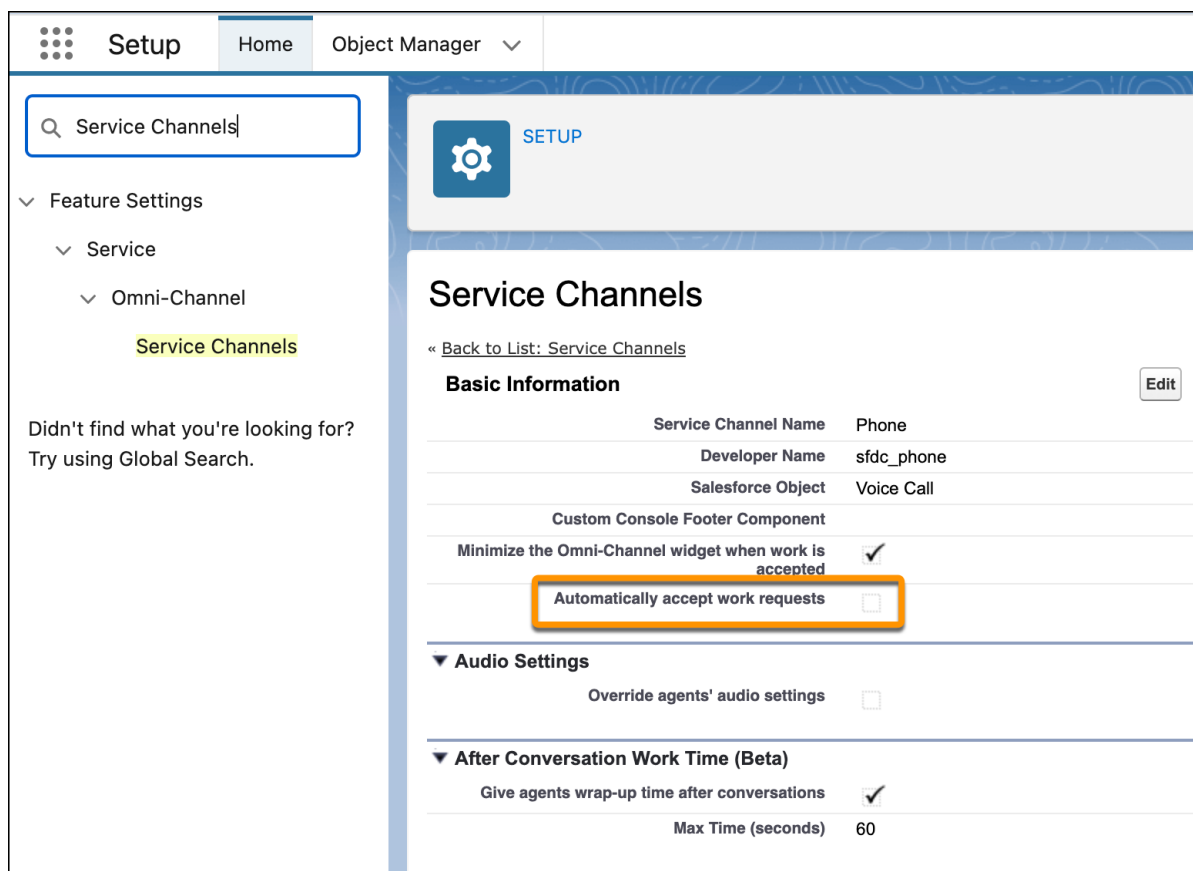
## Control Routing with Refined Auto Accept

When Auto Accept is enabled, incoming work items are automatically assigned to the agent. Now, you can enable this feature at the service channel level and have more control of it. For example, you can enable Auto Accept for phone calls but not chats. Previously, you could only enable Auto Accept for all agents assigned to a presence configuration.

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

**How:** In the Service Channels detail page under Setup, enable **Automatically accept work requests**.





## SEE ALSO:

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

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

## Connect Your Customers to a Bot with Omni-Channel Flow (Generally Available)

Omni-Channel Flow supports routing to and from Enhanced Bots, now generally available, on Messaging for In-App and Messaging for Web channels. Add business rules to a flow to send a conversation to a bot or an agent based on your criteria. Use flows and the Bot Builder to set up transfers from a bot to another bot, agent, queue, or skill.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Messaging for In-App and Web SKU. Setup for Einstein Bots is available only in Lightning Experience.

**When:** You can begin building and testing enhanced bots when Summer '22 rolls out to your org. You can connect your bot to enhanced channels when Messaging for In-App and Web is available beginning June 15, 2022.

## SEE ALSO:

[Upgrade Your Conversational Experiences with Enhanced Bots \(Generally Available\)](#)

## Einstein for Service

Go global with multi-language Reply Recommendations. Deflect cases and improve case handling time by integrating Case Classification and Article Recommendations with Flows. Try Article Recommendations for Conversations. Build bots faster using your own bot templates. Build rich conversational experiences with enhanced bots, which include support for more flexible routing and rich content. And, use the upgraded Einstein Bots API and Java SDK to launch bots using the channels and languages that your customers need.

### IN THIS SECTION:

#### [Train Your Reply Recommendations Model in 16 More Languages \(Generally Available\)](#)

Now generally available, Einstein Reply Recommendations supports 16 more languages: Arabic, Chinese-simplified, Chinese-traditional, Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese, Spanish, Thai, Turkish, and Russian. Languages are detected by analyzing your closed chat transcripts. Einstein uses these transcripts to identify common replies. Review and publish the replies to Quick Text so that they can be recommended to your agents.

#### [Deflect Cases with Einstein Article Recommendations for Flows \(Generally Available\)](#)

Integrate the power and flexibility of Flow Builder with Einstein Article Recommendations. Enable smart email auto-response to quickly answer customer questions and deflect cases with knowledge articles.

#### [Automate Case Triage with Einstein Case Classification for Flows \(Generally Available\)](#)

Use Flow Builder with Einstein Case Classification together to automatically classify new cases and route them to the correct queue. The `ApplyCaseClassificationRecommendations` action returns Einstein's field recommendations with the highest confidence level for your case.

#### [Save Agents Time with Einstein Article Recommendations for Conversations \(Pilot\)](#)

Use the predictive power of AI to recommend relevant knowledge articles to agents as conversations unfold. Real-time updates help agents deliver more productive service experiences to increase customer satisfaction and reduce the time that agents spend on each case.

#### [Einstein Bots](#)

Creating your own bot templates makes bot building a snap. Share your bot templates between orgs or on AppExchange. Build rich conversational experiences with Enhanced Bots, which include support for more flexible routing and rich content. View and test your bots in the Bot Builder without connecting and activating your bot using Text Preview. Use the upgraded Einstein Bots API and Java SDK to launch bots using the channels and languages that your customers love. And, a streamlined experience through Conversation Canvas gives you more freedom to drag and reorder elements.

### SEE ALSO:

[Einstein Release Notes](#)

## Train Your Reply Recommendations Model in 16 More Languages (Generally Available)

Now generally available, Einstein Reply Recommendations supports 16 more languages: Arabic, Chinese-simplified, Chinese-traditional, Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese, Spanish, Thai, Turkish, and Russian. Languages are detected by analyzing your closed chat transcripts. Einstein uses these transcripts to identify common replies. Review and publish the replies to Quick Text so that they can be recommended to your agents.

**Where:** This change applies to Salesforce Classic and Lightning Experience, in Enterprise, Performance and Unlimited editions. Multi-language support requires a platform upgrade.

**When:** Platform upgrades for Reply Recommendations start in Summer '22. To check when you're scheduled to upgrade to multi-language and the enhanced platform, contact Salesforce Customer Support.

**How:** After you're upgraded to the enhanced platform, you'll receive an email that Einstein identified new reply templates that are ready for your review. From the Setup page, turn on multi-language Reply Recommendations.

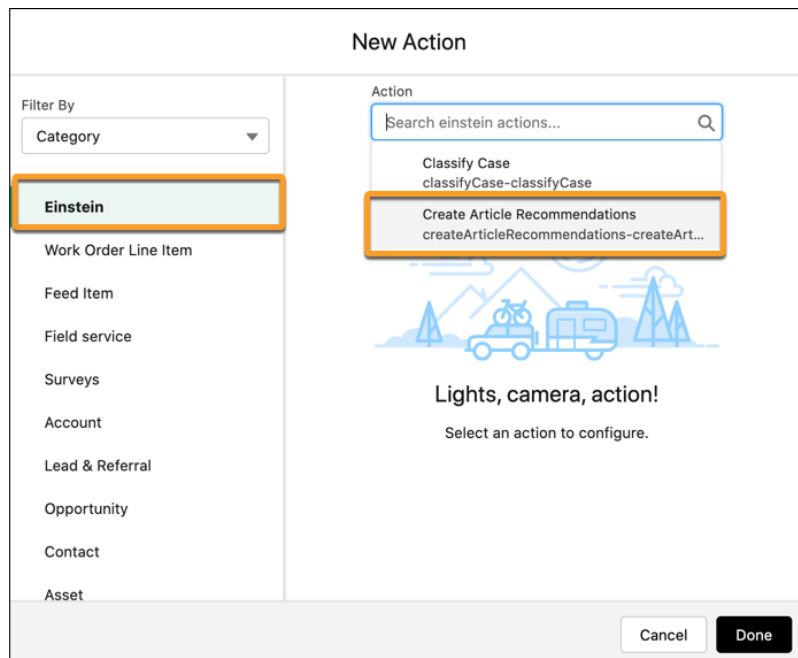
Languages			
Use Reply Recommendations for multiple languages. Einstein detects languages from chat transcripts, then determines if you can build a model based on the number of transcripts. <sup>1</sup>			
Language	Number of Transcripts	Readiness	Status
English	10000+ • Great	Active	✓ Enabled
German	< 1000 • Too Low	⊘ Excluded	⏻ Disabled
Russian	< 1000 • Too Low	⊘ Excluded	⏻ Disabled
Spanish	< 1000 • Too Low	⊘ Excluded	⏻ Disabled

## Deflect Cases with Einstein Article Recommendations for Flows (Generally Available)

Integrate the power and flexibility of Flow Builder with Einstein Article Recommendations. Enable smart email auto-response to quickly answer customer questions and deflect cases with knowledge articles.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Article Recommendations isn't available in partner editions or the Salesforce Government Cloud.

**How:** To add article recommendations to your flow, select Create Article Recommendations from the Action menu in Flow Builder.

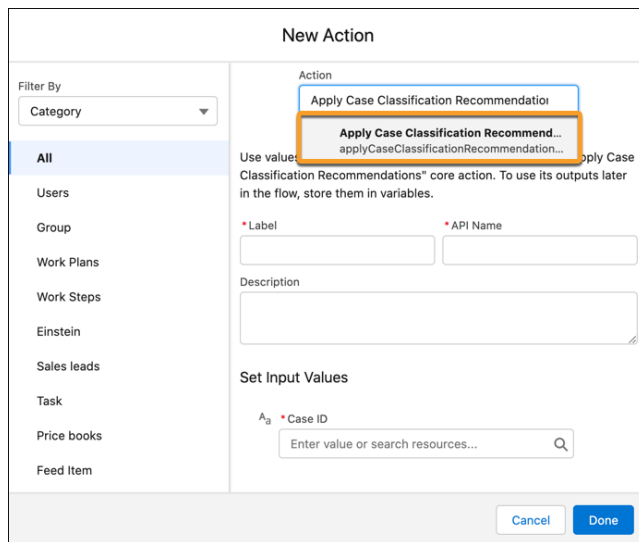


## Automate Case Triage with Einstein Case Classification for Flows (Generally Available)

Use Flow Builder with Einstein Case Classification together to automatically classify new cases and route them to the correct queue. The `ApplyCaseClassificationRecommendations` action returns Einstein's field recommendations with the highest confidence level for your case.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Classification Apps aren't available in partner editions or the Salesforce Government Cloud.

**How:** To add apply recommendations to your flow, select `ApplyCaseClassificationRecommendations` from the Action menu in Flow Builder. Add an Update Records action after the `ApplyCaseClassificationRecommendations` action to update the case with Einstein's recommendation.



Set custom confidence thresholds for specific fields with the `FetchCaseClassificationRecommendations` action. To add fetch recommendations to your flow, select `FetchCaseClassificationRecommendations (Pilot)` from the Action menu in Flow Builder. Not part of the fetch recommendations pilot? [Sign up](#) today!

## Save Agents Time with Einstein Article Recommendations for Conversations (Pilot)

Use the predictive power of AI to recommend relevant knowledge articles to agents as conversations unfold. Real-time updates help agents deliver more productive service experiences to increase customer satisfaction and reduce the time that agents spend on each case.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Article Recommendations isn't available in partner editions or the Salesforce Government Cloud.



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

**How:** If you use Live Agent or Service Cloud Voice, try signing up for [Einstein Article Recommendations for Conversations](#).

## Einstein Bots

Creating your own bot templates makes bot building a snap. Share your bot templates between orgs or on AppExchange. Build rich conversational experiences with Enhanced Bots, which include support for more flexible routing and rich content. View and test your bots in the Bot Builder without connecting and activating your bot using Text Preview. Use the upgraded Einstein Bots API and Java SDK to launch bots using the channels and languages that your customers love. And, a streamlined experience through Conversation Canvas gives you more freedom to drag and reorder elements.

### IN THIS SECTION:

#### [Create and Share Your Own Bot Templates \(Beta\)](#)

Now you can create your own bot templates from scratch or from existing bots. You can even package and share your bot templates between orgs or on AppExchange so everyone can use your bot customized for your industry or use case. Bot template packages include stored intent data, Flows, and Apex, so you can go from idea to fully featured bot in minutes.

#### [Upgrade Your Conversational Experiences with Enhanced Bots \(Generally Available\)](#)

Enhanced Bots, now generally available, is the next generation of bots. Connect an enhanced bot to new Messaging for In-App and Web channels, as well as Slack and the Einstein Bots API. Use the powerful routing of Omni-Channel Flow to send conversations to and from your bot. Plus, you can use an enhanced bot to send rich content, such as images and other files, without any workarounds.

#### [Preview Your Bot with Text Preview \(Beta\)](#)

Test and iterate on your bot before making it visible to your customers with Text Preview. Previously, you could preview a bot only when it was active and connected to a Chat channel. Now you can try out a bot's messages and conversation flow as text, regardless of its activation status or connection to a channel. The current preview experience is still available as Rich Content Preview and is available for Standard Bots only.

#### [Connect to Your Channels Faster with the Upgraded Einstein Bots API and the Java SDK \(Beta\)](#)

The Einstein Bots API is more flexible and scalable than ever with a RESTful makeover. You can use the Einstein Bots Connector Framework and the Java SDK to build bots on your preferred channels by getting access to Java-based tools and libraries.

#### [Search Less and Build More with Conversation Canvas](#)

Enjoy drag-and-drop building and personalization as the Conversation Canvas builder experience continues to be expanded and improved. This experience, introduced in Spring '22, now replaces the previous menu-based experience. Use the new Dialog Component Library panel to get building with fewer clicks. Plus, reorder your dialogs on the Dialogs tab.

#### [View Savings at a Glance with the Einstein Bots Value Dashboard](#)

Need a quick way to show the value of Einstein Bots to your stakeholders? Einstein Bots customers with CRM Analytics can use the new Einstein Bots Value managed package to quickly build and dig into reports and visualizations for bot business value, KPIs, and analytics. The dashboard uses your chat data and bot performance metrics, as well as cost information specific to your organization (for example, cost per agent per hour), to let you measure your bot's value against your organization's business objectives.

#### [Analyze Bot Performance with New Standard Reports](#)

Evaluate bot performance right out of the box with 16 new pre-built standard reports. Plus, we're including new reports and fresh versions of existing reports in a Einstein Bot Reports Summer '22 folder, so you can take advantage of newly added metric types on these reports without overwriting any of your customizations.

## Create and Share Your Own Bot Templates (Beta)

Now you can create your own bot templates from scratch or from existing bots. You can even package and share your bot templates between orgs or on AppExchange so everyone can use your bot customized for your industry or use case. Bot template packages include stored intent data, Flows, and Apex, so you can go from idea to fully featured bot in minutes.


**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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

**How:** On the Bots Setup page, click the Templates tab. Click **New** to create a template.

## Upgrade Your Conversational Experiences with Enhanced Bots (Generally Available)

Enhanced Bots, now generally available, is the next generation of bots. Connect an enhanced bot to new Messaging for In-App and Web channels, as well as Slack and the Einstein Bots API. Use the powerful routing of Omni-Channel Flow to send conversations to and from your bot. Plus, you can use an enhanced bot to send rich content, such as images and other files, without any workarounds.

 **Note:** We renamed our current bots experience to Standard Bots to reflect our expanded bot portfolio. Standard bots remain available for all Einstein Bots customers.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**When:** You can begin building and testing enhanced bots when Summer '22 rolls out to your org. You can connect your bot to enhanced channels when Messaging for In-App and Web is available beginning June 15, 2022.

**Who:** To use Messaging for In-App and Web channels with Enhanced Bots, contact your Salesforce Account Executive to access the Messaging for In-App and Web SKU.

SEE ALSO:

[Add Flexibility and Power with Messaging for In-App and Web \(Generally Available\)](#)

[Salesforce Help: Set Up Enhanced Bots \(can be outdated or unavailable during release preview\)](#)

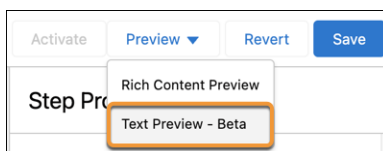
## Preview Your Bot with Text Preview (Beta)

Test and iterate on your bot before making it visible to your customers with Text Preview. Previously, you could preview a bot only when it was active and connected to a Chat channel. Now you can try out a bot's messages and conversation flow as text, regardless of its activation status or connection to a channel. The current preview experience is still available as Rich Content Preview and is available for Standard Bots only.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer edition. Setup for Einstein Bots is available only in Lightning Experience.

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

**How:** In the Bot Builder, on the Dialogs tab, click **Preview**, and then select your preview experience. To preview an enhanced bot, you must select **Text Preview - Beta**.



SEE ALSO:

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

## Connect to Your Channels Faster with the Upgraded Einstein Bots API and the Java SDK (Beta)

The Einstein Bots API is more flexible and scalable than ever with a RESTful makeover. You can use the Einstein Bots Connector Framework and the Java SDK to build bots on your preferred channels by getting access to Java-based tools and libraries.

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SEE ALSO:

[Salesforce Developer Guide: Einstein Bot API](#)

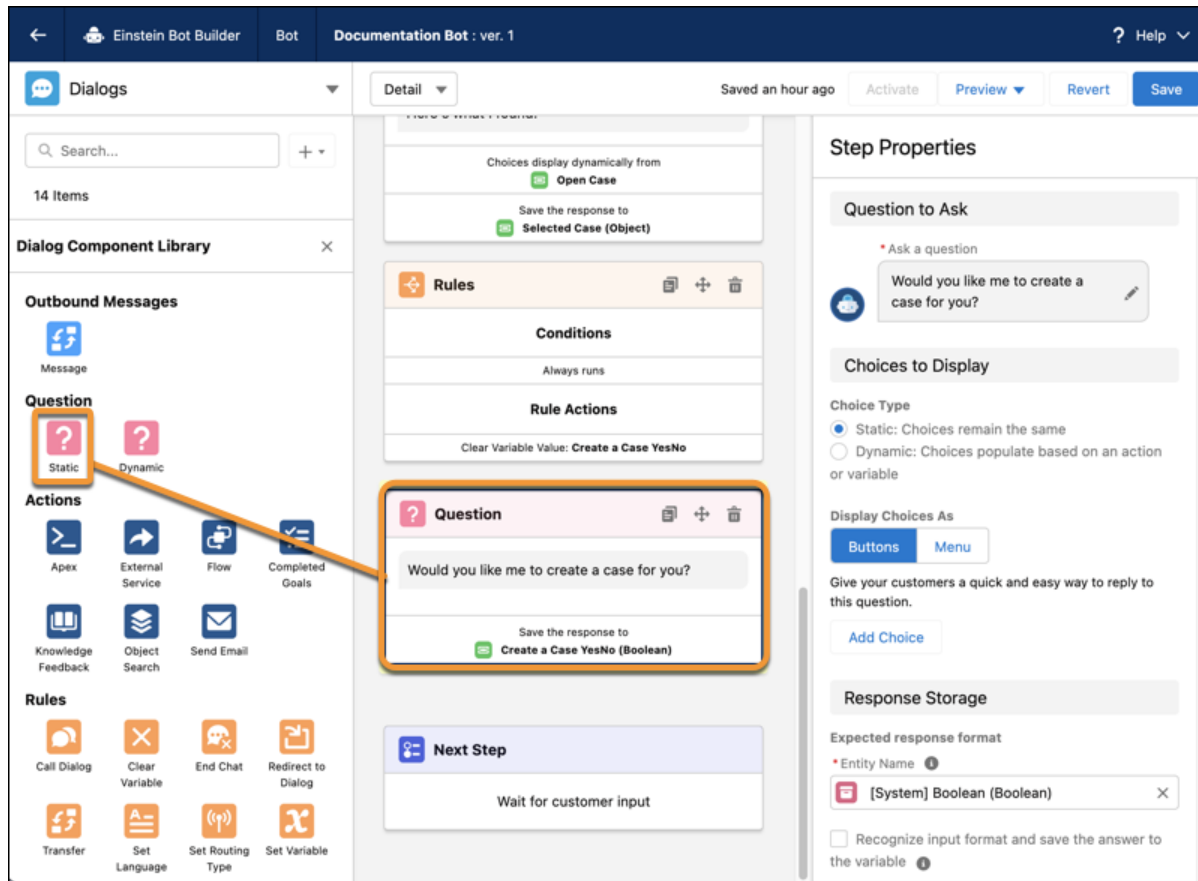
## Search Less and Build More with Conversation Canvas

Enjoy drag-and-drop building and personalization as the Conversation Canvas builder experience continues to be expanded and improved. This experience, introduced in Spring '22, now replaces the previous menu-based experience. Use the new Dialog Component Library panel to get building with fewer clicks. Plus, reorder your dialogs on the Dialogs tab.

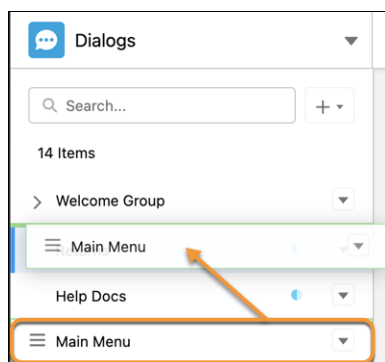
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**How:** When you access the Dialogs tab of the Bot Builder, Conversation Canvas is the only builder experience. The previous menu-based experience has been retired.

To add a dialog step to your bot, move an icon from the Dialog Component Library onto the canvas and configure the details in the Step Properties panel.



To reorder your dialog list, on the Dialogs tab, drag a dialog or dialog group to a new location in the list.



SEE ALSO:

[Salesforce Spring '22 Release Notes: Build Your Bot with Confidence in Conversation Canvas](#)



## View Savings at a Glance with the Einstein Bots Value Dashboard

Need a quick way to show the value of Einstein Bots to your stakeholders? Einstein Bots customers with CRM Analytics can use the new Einstein Bots Value managed package to quickly build and dig into reports and visualizations for bot business value, KPIs, and analytics. The dashboard uses your chat data and bot performance metrics, as well as cost information specific to your organization (for example, cost per agent per hour), to let you measure your bot's value against your organization's business objectives.



**Note:** The Chatbot Analytics v2 dashboard is scheduled to retire in Winter '23. To prepare your org, download and set up the Einstein Bots Value dashboard.

**Where:** This change applies to Einstein Bot customers with CRM Analytics in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience. Einstein Bots is available in Enterprise, Performance, Unlimited, and Developer editions. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**Who:** To create and manage the Einstein Bots Value dashboard, you must have the Access Service Cloud Analytics Templates and Apps, Manage Tableau CRM Templated Apps, and Edit CRM Analytics Dataflows permissions. To view the Einstein Bots Value dashboard, you must have the Access Service Cloud Analytics Templates and Use Tableau CRM Templated Apps permissions.

**How:** To get the app template, download the Einstein Bots Value managed package from *AppExchange*.

To create the app, from the App Launcher, select **Analytics Studio**. Click **Create**, select **App**, and then search for and select the **Einstein Bots Value** dashboard app template. Complete the setup wizard to customize the app with cost information from your organization.

SEE ALSO:

[AppExchange: Einstein Bots Value Dashboard](#)

[Salesforce Help: View Bot Performance with CRM Analytics \(can be outdated or unavailable during release preview\)](#)

## Analyze Bot Performance with New Standard Reports

Evaluate bot performance right out of the box with 16 new pre-built standard reports. Plus, we're including new reports and fresh versions of existing reports in a Einstein Bot Reports Summer '22 folder, so you can take advantage of newly added metric types on these reports without overwriting any of your customizations.

**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 metric types are available to add to reports:

- ELU Boolean Extracted: The bot extracted a boolean entity.
- ELU Entity Called: The bot extracted an entity.
- ELU Intent Called: The bot identified an intent via intent recognition.

The following new reports are available in the Einstein Bot Reports Summer '22 folder:

- Boolean Extraction Rate Last 30 Days: A count of successful (yes or no) and unsuccessful (neutral) boolean entity extraction attempts by bot in the last 30 days. A relatively high count of neutral responses can indicate an opportunity to improve bot design.
- Boolean Extraction Rate Today: A count of successful (yes or no) and unsuccessful (neutral) boolean entity extraction attempts by bot today. A relatively high count of neutral responses can indicate an opportunity to improve bot design.
- Dialogs Used Per Session Last 7 Days: The distribution of the number of dialogs started per session in the last 7 days. Use this report to understand the complexity of your bot conversations.
- Entity Extraction Rate Last 30 Days: A count of successful and unsuccessful entity extraction attempts by bot in the last 30 days.
- Entity Extraction Rate Today: A count of successful and unsuccessful entity extraction attempts by bot today.
- Goals Completed Last 30 Days: A count of goals completed by bot and by day in the last 30 days.

- Goals Completed Today: A count of goals completed by bot and by hour today.
- Intent Recognition Count Last 30 Days: A count of intent recognition attempts against the intent model by bot and by day in the last 30 days.
- Intent Recognition Count Today: A count of intent recognition attempts against the intent model by bot and by day today.
- Intent Recognition Rate Last 30 Days: A count of successful and unsuccessful intent recognition attempts against the intent model by bot in the last 30 days.
- Intent Recognition Rate Today: A count of successful and unsuccessful intent recognition attempts against the intent model by bot today.
- Intents Recognized Last 30 Days: A count of intents recognized by intent and by bot in the last 30 days.
- Intents Recognized Today: A count of intents recognized by intent and by bot today.
- Transfer to Bots by Dialog Last 30 Days: A count of bot-to-bot transfers by dialog and by bot that initiated the transfer in the last 30 days.
- Transfer to Bots by Dialog Today: A count of bot-to-bot transfers by dialog and by bot that initiated the transfer today.
- Transfers Last 30 Days: A count of transfers to bots or agents by bot in the last 30 days.
- Transfers Today: A count of transfers to bots or agents by bot today.

The following existing reports have been updated:

- Engaged Sessions Last 7 Days now replaces the previous All & Engaged Sessions Last 30 Days and All & Engaged Sessions Today reports  
Engaged Sessions Last 7 Days: Engaged sessions vs. unengaged sessions by day for the last 7 days. In an engaged session, 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.
- The names and descriptions of the existing NLP Intent Called Last 30 Days and NLP Intent Called Today reports have been updated.  
Intents Matched and Recognized (30 Days): An aggregate count of successful exact matches and intent recognition by intent and by bot in the last 30 days.  
Intents Matched and Recognized Today: An aggregate count of successful exact matches and intent recognition by intent and by bot today.

#### SEE ALSO:

[Salesforce Help: Navigate Einstein Bot Standard Reports \(can be outdated or unavailable during release preview\)](#)

## Workforce Engagement

Give planners oversight into today's shift activities for each agent. React to overstaffing, understaffing, or schedule assignment issues by editing shift activities in real time. Give agents a place to view schedule details, auto-receive emails about changes to assigned shifts, and approve or reject shifts. Omni-Channel Plan is renamed to Capacity Plan.

#### IN THIS SECTION:

##### [Monitor Agents' Daily Activity and Mitigate Staffing Gaps with Intraday Management](#)

Identify and resolve staffing gaps caused by agent adherence or an unforeseen spike in demand. The Intraday Management dashboard displays data for the current business day only, letting you focus on immediate needs. You can easily assign agents to new tasks based on fluctuating demand. Monitor agents' real-time adherence and align your workforce with today's schedule.

### [Notify Agents of Changes to Shifts with Intraday Management](#)

Notify agents when they're assigned to a shift, when a shift's job profile changes, or when a shift segment on an assigned shift changes.

### [Assign Specific Activities During a Shift with Shift Segments](#)

Let your agents know how to spend their time during their shift. Each shift segment represents a specific work activity (chat, email, or phone call); non-work activity (meeting or training); or break (break or lunch). Create shift segments in 5-minute increments, and add them to shifts.

### [Let Agents View Shift Segments and Accept or Decline Shifts in Agent Home](#)

Agent Home is now interactive. Agents can review the granular breakdown of their shift segments. Optionally, you can create an approval process and flow to let agents accept or decline changes to their shifts in real time.

### [The Workforce Engagement Planner Permission Set Now Includes Shift Segments](#)

The Planner now has Create, Read, and Update permissions on Shifts and Create, Read, and Update permissions on Shift Segments.

### [Omni-Channel Plan Is Now Called Capacity Plan](#)

Your staff planning tool has a new name. Omni-Channel Plan has been renamed Capacity Plan to better articulate that you can plan staffing in two workflows: the Omni-Channel queue-based routing workflow or the non-Omni workflow.

## Monitor Agents' Daily Activity and Mitigate Staffing Gaps with Intraday Management

Identify and resolve staffing gaps caused by agent adherence or an unforeseen spike in demand. The Intraday Management dashboard displays data for the current business day only, letting you focus on immediate needs. You can easily assign agents to new tasks based on fluctuating demand. Monitor agents' real-time adherence and align your workforce with today's schedule.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

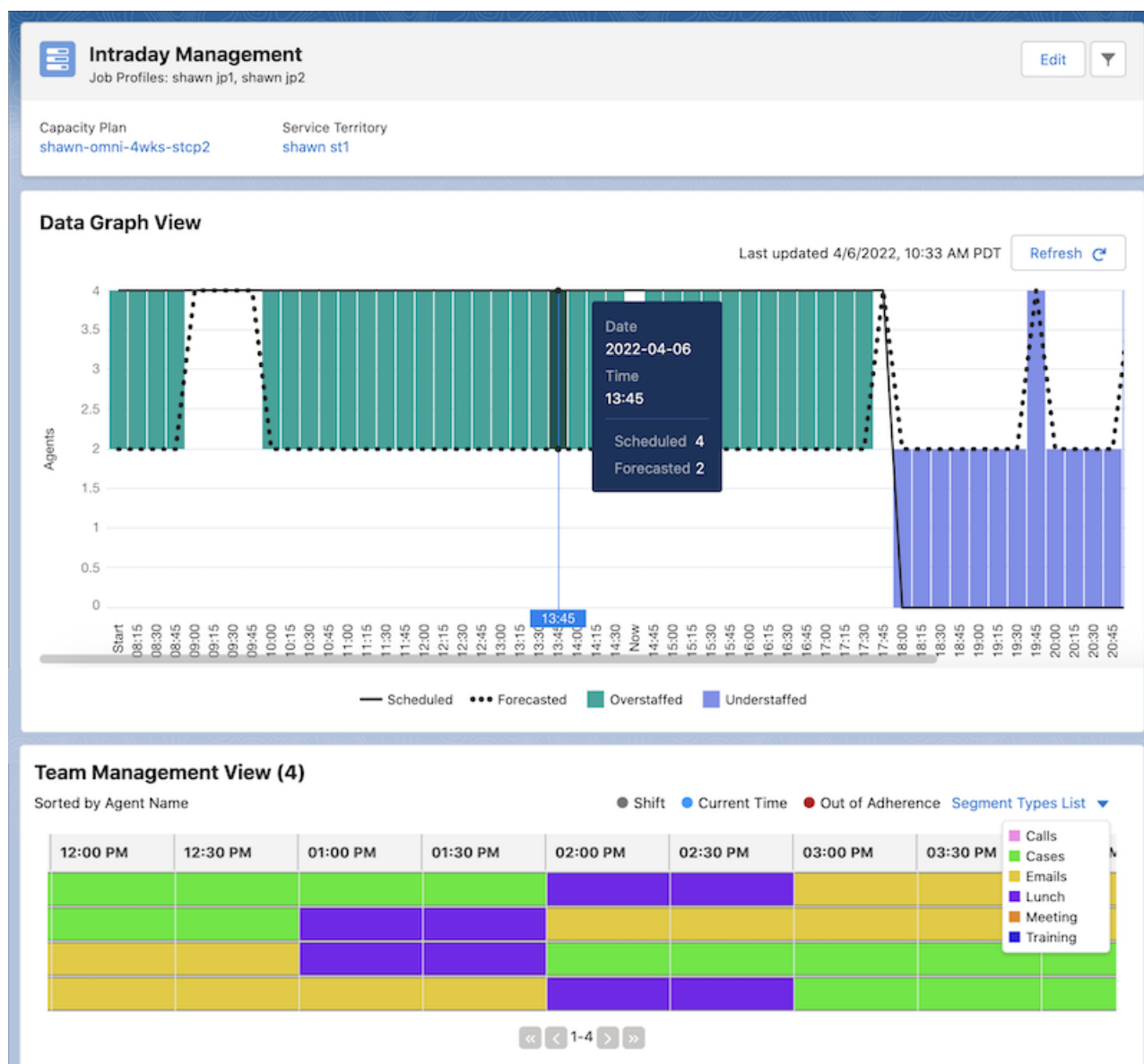
**Who:** Users with the Workforce Engagement Planner permission set can view and edit the Intraday Management dashboard. Users with an Omni-Channel queue-based routing workflow see both the Data Graph View and the Team Management View in their dashboard, and get access to real-time adherence flagging. Users with a non-Omni workflow see just the Team Management View in their dashboard and don't have access to real-time adherence flagging.

**Why:** To help planners manage the current business day's workload and track real-time adherence, Intraday Management gives you two views.

- The Data Graph View of Intraday Management compares the number of agents assigned to shifts to the number of agents required to meet your demand for your current business day. We show you any over or understaffing.
- The Team Management View shows agents' schedules and real-time adherence. If the Data Graph View shows overstaffing or understaffing for a particular job profile, or if the Team Management View shows that an agent is out of adherence, you can adjust shift segments in your agents' schedules.

**How:** Ensure that your admin has followed the Admin Checklist for Intraday Management before launching the tab.

From the App Launcher, find and select **Intraday Management**. Click **Let's Go**. Then follow the steps to launch your dashboard.



## Notify Agents of Changes to Shifts with Intraday Management

Notify agents when they're assigned to a shift, when a shift's job profile changes, or when a shift segment on an assigned shift changes.

**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:** An Admin can enable the Intraday Management org pref, which turns on email notifications.

**How:** From Setup, in the Quick Find box, search for *WorkForce Engagement Management*, and click **Get Started**. Check the **Add Intraday Management Tab** box and the **Enable Real-Time Adherence** box.

## Assign Specific Activities During a Shift with Shift Segments

Let your agents know how to spend their time during their shift. Each shift segment represents a specific work activity (chat, email, or phone call); non-work activity (meeting or training); or break (break or lunch). Create shift segments in 5-minute increments, and add them to shifts.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

**Who:** Users with the Workforce Engagement Planner permission set can view, create, and edit shift segments.

**How:** Ensure that your admin has followed the Admin Checklist for Shift Scheduling Tools and the Admin Checklist for Shift Segments before launching the tab.

From the App Launcher, find and select **Shifts**. Check the box for each shift that you want to update, and click **Add Segments**.

To edit a shift segment, return to the Shifts tab. Click to edit a shift, and find its shift segments in the related list. Edit and save your changes.

You can also edit shift segments from the Team Management View of the Intraday Management dashboard. Hover over a shift segment, and click the pencil icon that appears. Save your changes.

## Let Agents View Shift Segments and Accept or Decline Shifts in Agent Home

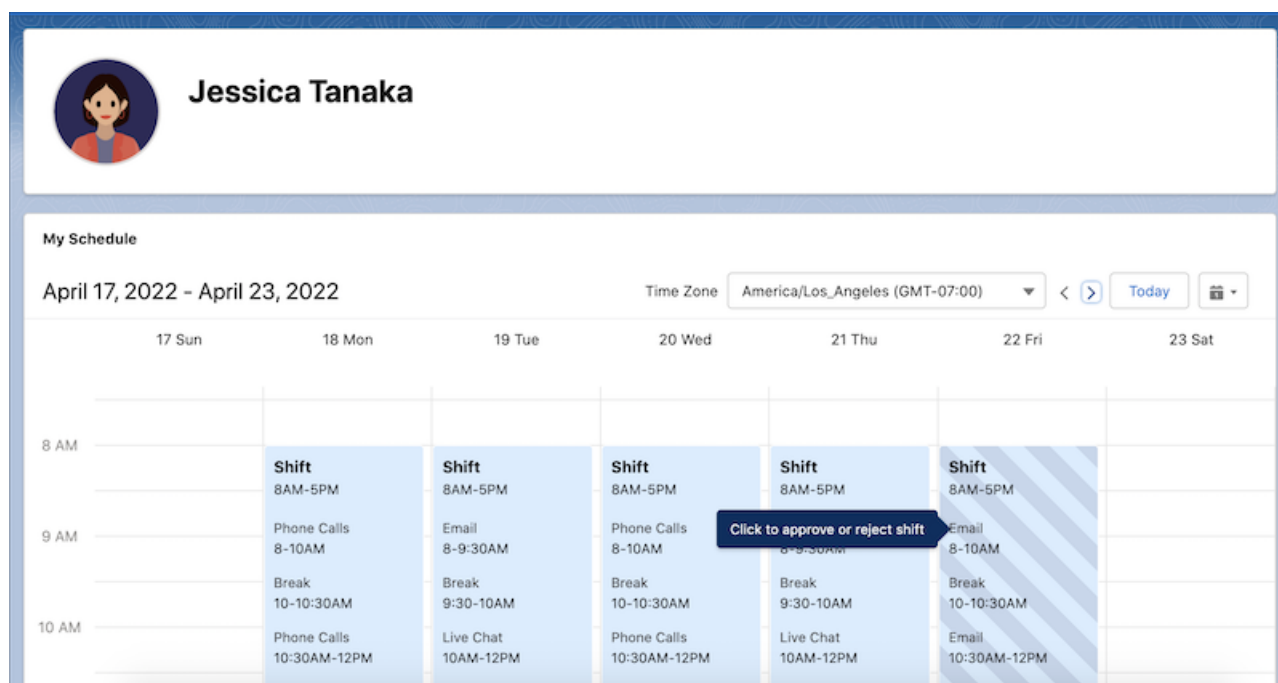
Agent Home is now interactive. Agents can review the granular breakdown of their shift segments. Optionally, you can create an approval process and flow to let agents accept or decline changes to their shifts in real time.

**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 the Agent permission set can view their own Agent Home tab and accept or decline shifts from it.

**How:** Follow the Admin Checklist for Intraday Management before launching the tab.

From the App Launcher, find and select **Agent Home** to view shifts and shift segments. If an optional approval process and flow are in place, click the pending shift, and then approve or reject the changes.



## The Workforce Engagement Planner Permission Set Now Includes Shift Segments

The Planner now has Create, Read, and Update permissions on Shifts and Create, Read, and Update permissions on Shift Segments.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

**Who:** Users with the Workforce Engagement Planner permission set can experience these updates.

**How:** This change is automatically applied to the permission set.

## Omni-Channel Plan Is Now Called Capacity Plan

Your staff planning tool has a new name. Omni-Channel Plan has been renamed Capacity Plan to better articulate that you can plan staffing in two workflows: the Omni-Channel queue-based routing workflow or the non-Omni workflow.

**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.

## Incident Management

When an urgent incident affects your customers, use Incident Management to eliminate potential complications before they become showstoppers. Employ out-of-the-box flows to automate your incident resolutions. Break down team silos and speed up time to resolution with swarming on incidents, problems, and change requests in Slack. Monitor disruptions in more places with third-party integrations and out-of-the-box reporting.

## IN THIS SECTION:

[Resolve Incidents Across Teams with Swarming in Slack](#)

Help your customer service and development and operations (DevOps) teams better collaborate when a widespread incident occurs. With Slack swarming now available for incidents, problems, and change requests, your DevOps teams can get visibility into an incident as they work toward resolution. And your service teams can get timely incident progress reports to keep customers updated.

[Save Time with Automated Incident Management Workflows](#)

Keep your incident teams focused on resolutions with powerful out-of-the-box flows for Incident Management. Your teams stay productive with cases, incidents, and problems related to a change request that closes automatically when an issue is resolved. Cut down on ownership confusion when cases are identified as part of an incident with a flow that automatically reassigns the case owners to the incident owner.

[Monitor Disruptions with Incident Management Integrations](#)

Seamlessly integrate Incident Management from Service Cloud with partner systems to identify potential issues and proactively address them before they become showstoppers. Sync incidents across platforms and help engineering and operations collaborate with PagerDuty, Datadog, Cadalys Sentinel, Jira, and ServiceNow available to integrate with Service Cloud Incident Management.

[Get Incident Management Insights](#)

Glean how your company addresses and resolves incidents with Incident Management reports and dashboard. See how many incidents, problems, and change requests were created and closed. And measure user adoption with monthly active users.

[Get the Enhanced Incident Management Experience](#)

Get the most out of Incident Management with continued enhanced functionality. Now your users can track cases related to a change request, resolve incidents on the go, and more.

## Resolve Incidents Across Teams with Swarming in Slack

Help your customer service and development and operations (DevOps) teams better collaborate when a widespread incident occurs. With Slack swarming now available for incidents, problems, and change requests, your DevOps teams can get visibility into an incident as they work toward resolution. And your service teams can get timely incident progress reports to keep customers updated.

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

**Who:** Service Cloud for Slack is available with Service Cloud in Lightning Experience for Enterprise, Performance, and Unlimited editions. Users must have access to Slack.

**How:** Incident Management teams can start a swarm from a record in Salesforce, or they can use the `/service-swarm-start` Slack slash command.

**swarm-incident-000000027** ▾

★ 1 Pinned + Add a bookmark

This is the very beginning of the **swarm-incident-000000027** channel  
 @Swarming-NA46 created this channel on March 25th. It's private, and can only be joined by invitation. [Add description](#)

[Add people](#)  
[Forward emails to this channel](#)

Friday, March 25th ▾

**Swarming-NA46** APP 12:36 PM  
 joined swarm-incident-000000027 along with Ashley Service.

★ Pinned by Swarming-NA46

**Swarming-NA46** APP 12:38 PM  
 Swarm request from @Ashley Service

Incident | [INC-000000027](#)

[View Incident](#) [Finish Swarming](#)

**Help Needed:**  
 When you are done collaborating, you can finish the Swarm and records will be updated in Salesforce.

To track the issues that require a swarm and the swarm members, Swarms and Swarm Members related lists are added to the record layout. And with Expert Finder, your users can easily select the skills required to resolve the issue so that the right team members automatically are added to the swarm.

Incident **INC-000000037** [+ Follow](#) [Begin Swarming](#) ▾

Details **Related**

**Swarms (1)** [New](#)

1 item • Updated a few seconds ago

	Swarm Name ▾	Owner ▾	Status ▾	Started Dat... ▾	Ended Dat... ▾
1	<a href="#">Swarm On Incid...</a>	<a href="#">u42</a>	In Progress	3/29/2022, 3:17...	

[View All](#)

**Swarm Members (1)** [New](#)

1 item • Updated a few seconds ago

	Swarm Me... ▾	Owner ▾	Status ▾	Created Date ▾	Assigned D... ▾	Comple...
1	<a href="#">Swarm Membe...</a>	<a href="#">u42</a>	In Progress	3/29/2022, 3:1...	3/29/2022, 3:1...	

[View All](#)

To streamline swarming actions for incidents, problems, and change requests, users can access flows from the record in Salesforce to add members to a swarm, close the swarm, or reopen it.

**Actions & Recommendations**

**Actions** History

[Add](#)

[Add Member To Swarm](#) ⚡ ▾

[Finish Swarming](#) ⚡ ▾

[Reopen the Swarm](#) ⚡ ▾



SEE ALSO:

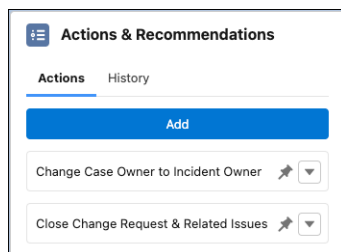
[Salesforce Help: Swarm on an Incident, Problem, or Change Request \(can be outdated or unavailable during release preview\)](#)

## Save Time with Automated Incident Management Workflows

Keep your incident teams focused on resolutions with powerful out-of-the-box flows for Incident Management. Your teams stay productive with cases, incidents, and problems related to a change request that closes automatically when an issue is resolved. Cut down on ownership confusion when cases are identified as part of an incident with a flow that automatically reassigns the case owners to the incident owner.

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

**How:** Clone the sample flows and create a deployment. After you add the deployment to an incident or change request page layout, users can launch the flow from the Actions & Recommendations component.



SEE ALSO:

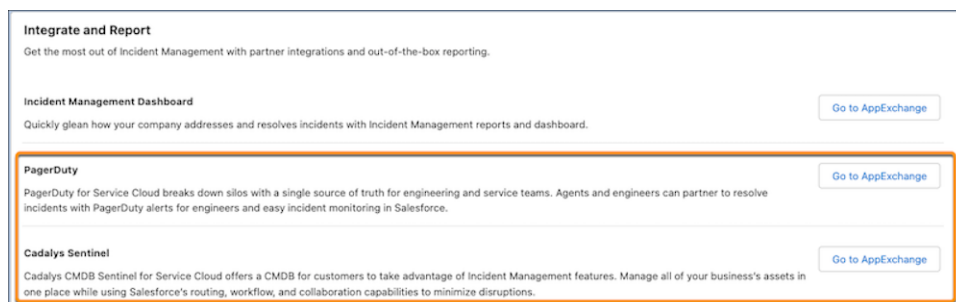
[Salesforce Help: Flows for Incident Management \(can be outdated or unavailable during release preview\)](#)

## Monitor Disruptions with Incident Management Integrations

Seamlessly integrate Incident Management from Service Cloud with partner systems to identify potential issues and proactively address them before they become showstoppers. Sync incidents across platforms and help engineering and operations collaborate with PagerDuty, Datadog, Cadalys Sentinel, Jira, and ServiceNow available to integrate with Service Cloud Incident Management.

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

**How:** From the Incident Management setup page, install Incident Management partner managed packages.



SEE ALSO:

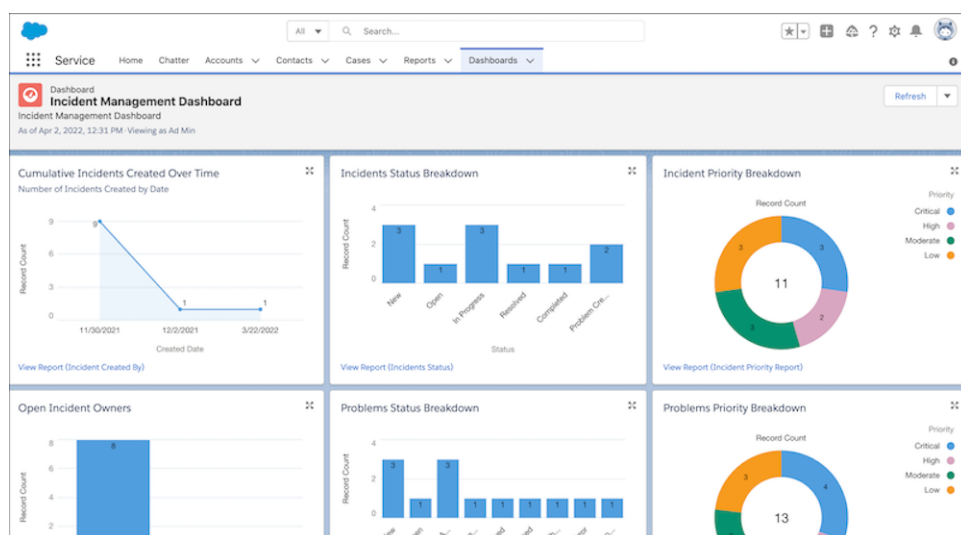
[Salesforce Help: Set Up Incident Management Integrations](#) (can be outdated or unavailable during release preview)

## Get Incident Management Insights

Glean how your company addresses and resolves incidents with Incident Management reports and dashboard. See how many incidents, problems, and change requests were created and closed. And measure user adoption with monthly active users.

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

**How:** From the Incident Management setup page, install the Incident Management dashboard managed package.



SEE ALSO:

[Salesforce Help: Report On Incident Management](#) (can be outdated or unavailable during release preview)

## Get the Enhanced Incident Management Experience

Get the most out of Incident Management with continued enhanced functionality. Now your users can track cases related to a change request, resolve incidents on the go, and more.

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

**How:** Track cases related to a change request with the Case Related Issues related list.

Case Related Issues (1)

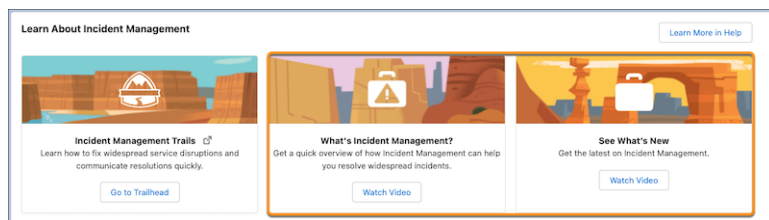
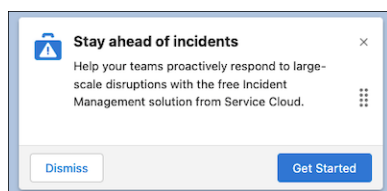
1 item • Updated a minute ago

Case	Relationship Type	Case Related Issue Number	
1 <a href="#">00001003</a>	Similar	<a href="#">CRI-00000001</a>	<div></div>
<a href="#">View All</a>			

Report on work plans attached to a change request with a new object relationship between Work Plans, including its child objects, and Change Requests.

Resolve incidents from anywhere with Incident Management features available on mobile.

Get up to speed on new features and learn how to resolve incidents with new videos available on the Incident Management setup page.



## Other Changes

Learn about other changes we've made in the Service Cloud.

### IN THIS SECTION:

#### [Disable Ref ID and Transition to New Email Threading Behavior \(Release Update\)](#)

We now match email headers to their corresponding cases. With the new threading behavior, new outbound emails don't contain a Ref ID. This update was first made available in Winter '21.

#### [Use a Default No-Reply Address as System Address for Case Email Notifications \(Release Update\)](#)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update was first made available in Spring '21 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '23.

## 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 `getCaseIdFromEmailHeaders` replaces `getCaseIdFromEmailThreadId` wherever it occurs in your org's custom code.

SEE ALSO:

[Salesforce Help: Email-to-Case Threading \(can be outdated or unavailable during release preview\)](#)  
[Release Updates](#)

## Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update was first made available in Spring '21 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](#)

## Work.com

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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

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

### Customer Success Group

Wherever you are in your Salesforce journey, Customer Success has something for everyone. From free, easy-to-use resources to service engagements—and a whole lot in between—Customer Success is there to guide you at every step on your path to success. And with each release, we introduce new and better ways to help you see results from all your Salesforce products, faster. Highlights for this Summer '22 release include:

- Signature Success Plan Enhancements
- Premier Success Plan Enhancements
- Success Center Enhancements

Get to know Success Plans by checking out our [overview page](#) or taking the [Salesforce Success Plans Trailhead module](#). Or experience the Success Center enhancements for yourself by visiting the Success Center at [successcenter.salesforce.com](https://successcenter.salesforce.com). 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 amazing Trailhead learning content you love—including the 1000+ badges of marketable skills and trailmixes—right from the palm of your hand. Collaborate with Trailblazers, ask questions, and share knowledge on important topics with the community in Trailhead GO. Now you can view top contributors in the Trailblazer Community and climb the ranks yourself with the new answers leaderboard. Focus on learning content that is best completed on a mobile device with the Trailhead GO compatible filter. And seamlessly get the content you need with the refreshed Today tab and new Community navigation. Trailhead GO supports 8 different languages, now including Simplified Chinese and Korean and is available on iPhone, iPad, and Android devices.

- Android: [Trailhead GO at Google Play](#)
- iOS: [Trailhead GO at the App Store](#)

## Release Updates

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

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run option that lets you enable an update and examine any changes to your org, including changes to customizations, before that update's Complete Steps By date.

To view release updates, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**.

## Enforced with This Release

These updates are scheduled to be enforced this release.

### **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.

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

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. MFA challenges are now bypassed for users who are assigned the user permission Multi-factor Authentication for User Interface Logins and are logging in with an SSO Auth Provider. This update was first made available in Winter '22.

### **Experience Browser Performance Improvements for Salesforce CPQ (Release Update)**

With this update, Salesforce CPQ runs faster in supported web browsers by employing Web Components V1 technology. This update was first made available in Summer '21 and is enforced in Summer '22.

### **Legacy API Versions 7.0 Through 20.0 Are Now Retired (Release Update)**

Versions 7.0 through 20.0 of the Salesforce Platform API are now retired and unavailable. Requests to these versions now fail with an error message indicating that the requested endpoint has been deactivated. The Release Card was first available in Spring '21 and this change was first announced in November 2019.

### **Securely Update Email Addresses and Reset Passwords (Release Update)**

This release update was originally enforced in Spring '22, but the enforcement was unsuccessful for some orgs. Orgs that weren't enforced in Spring '22 are now enforced in Summer '22. To ensure the security of your org, users must 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 new email address became active as soon as you saved the change, bypassing verification. This update was first made available in Summer '21.

## 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 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. 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 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23 for production orgs. For sandboxes and non-production orgs, the enforcement date is still Winter '23 unless you enable a new org-level setting that postpones the enforcement to Spring '23.

**Enable Permission Set Expiration and Enhanced UI (Release Update)**

With this update enabled, you can assign an expiration date to each permission set or permission set group. Permission set and permission set group assignments also use a new Lightning Experience interface and an improved workflow. Users can be assigned to permission sets or permission set groups with or without an expiration date. When a permission set or permission set group has an expiration date, users can lose access to functionality after the expiration date. By default, permission set and permission set group assignments don't expire. This update was first available in Summer '22.

**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.

**Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions (Release Update)**

To improve the security of your data, Salesforce is removing guest user assignments from permission sets and permission set groups associated with permission set licenses that contain View All, Modify All, edit, and delete standard object permissions. The only standard object permissions allowed for guest users are read and create. You can no longer assign guest users permission sets or permission set groups that are associated with these permission set licenses that contain the restricted permissions. This update was first available in Spring '22.

**Enable Visualforce JavaScript Remoting Enforcement (Release Update)**

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To ensure that the API is properly secured, calls now have stricter validation. This update was first available in Summer '22 and is enforced in Winter '23.

**Validate Getter and Setter Access Modifier Enforcement During Visualforce Expression Language Parsing (Release Update)**

To improve security, this update validates the Apex get or set method access modifier and throws an error if the Visualforce Expression Language can't invoke the method. When accessing Apex getter or setter methods defined by custom controllers, the Visualforce Expression Language incorrectly validates the access modifiers of the methods. Developers can sometimes access unauthorized get or set methods on Apex classes. This update was first available in Summer '22 and is enforced in Winter '23.

**Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)**

The Frequency and Frequency Type fields on the Maintenance Plan begin their phased retirement in Summer'22. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first made available in Summer '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.

**Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)**

In Winter '22 we discontinued the Run Flows permission for the Guest User and Experience Cloud External User profiles in new orgs. The change improves site security by requiring explicit guest user permissions to run flows. Without the Run Flows permission, you're free to use the more granular permission structure embedded in Flows and give your users the detailed access they need. Run Flows will be removed from the Guest User profile in all orgs in Spring '23. To avoid future access issues, we recommend updating your sites to the new permission structure before Spring '23. This update was first available in 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.

**Upgrade SAML Single Sign-On Framework (Release Update)**

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This update can impact integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, even when you're using Identity for Employees or Salesforce Customer Identity, including Experience Cloud.

**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 Spring '23.

**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.

## 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.

**Enable New Order Save Behavior (Release Update)**

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

**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.



**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.

**Legacy API Versions 21.0 Through 30.0 Are Being Retired (Release Update)**

Versions 21.0 through 30.0 of the Salesforce Platform API are being retired in Summer '23. They are now deprecated and are no longer supported by Salesforce. The Release Card was first available in Summer '21 and this change was first announced in October 2020.

## 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 (Update, Postponed)**

This release update has been postponed indefinitely while we change the implementation to reduce customer impact. The release update won't be enforced in its present form. Don't enable it.

**Keep Working with Tab-Focused Dialogs (Release Update)**

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.

**Prevent Consecutive API Navigation Calls (Release Update)**

This release update has been postponed indefinitely and not enforced in its present form. Don't enable it.

## Legal Documentation

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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](#).