Salesforce Release Notes

Salesforce, Winter '23

Help your business grow, adapt, and save with hundreds of innovations every release.

'23

CONTENTS

SALESFORCE WINTER '23 RELEASE NOTES

The Winter '23 release helps you grow your business, reduce costs, and create efficiencies.

IN THIS SECTION:

How to Use the Release Notes

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

Get Ready for the Release

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

How and When Do Features Become Available?

Some features in Winter '23 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

Learn about new features and enhancements that affect your Salesforce experience overall.

Analytics

Browse and subscribe to Lightning reports and dashboards in Slack, and demystify report creation with custom report type details. Speed up data preparation with data templates, save time with ready-to-deploy Customer Insights Service and Case dashboards, and embed multiclass predictions in a dataset during data prep.

Commerce

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

Customer Data Platform (formerly Salesforce CDP)

Customer Data Platform, formerly known as Salesforce CDP, helps you create a single source of truth (SSOT) so you can get to know your customers and engage with relevance. Admins can use the CRM Analytics dashboards to augment your analysis without moving the data from Customer Data Platform.

Customization

Make your account, contact, and opportunity Lightning pages more robust and flexible with Dynamic Forms. Use the Salesforce Connect adapter for Amazon Athena, now generally available, to access Athena's capability to run queries against data directly in Amazon S3. Improve address data accuracy and provide a better user experience with Custom Address Fields, now generally available.

Deployment

Send customizations from one org to another by adding these components to change sets.

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

Make it easier for service agents to find knowledge articles with Einstein Search for Knowledge, now generally available. Use live Snowflake data with your Einstein Discovery models and enjoy a more flexible source of truth. Ramp up quickly with new learning maps for Einstein Bots and Einstein Prediction Builder, plus a new welcome experience for Einstein Conversation Insights managers and reps. Customizable dashboards help you show the value of your Einstein Article Recommendations and Einstein Reply Recommendations setups.

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

Experience Cloud

Discover a more flexible way to work with enhanced LWR sites and CMS workspaces, now generally available. Search across content, partially deploy a site, enjoy updated content management options, and more, all on one unified platform. Create branded mobile apps in your LWR sites and use improved navigation settings in Mobile Publisher. Unlock better site performance with enhanced domains, Apex caching, and micro-batching.

Field Service

Manage assets more intelligently by planning maintenance based on usage or real-world elapsed time between maintenance visits. Smoothly track inventory movement with enhanced serialized products. Check under the hood in the Optimization Hub, with insights such as how your response times and resource utilization improved. Upgrade your scheduling capabilities by creating complex work dependencies and retrieving available appointment times more quickly. Showcase your brand's personality in customized Appointment Assistant messages to your customers. Improve your service by asking for a reason when customers cancel appointments. Envision a custom mobile app for your business, then make it happen with Lightning web components (Beta). And it's easier than ever to use the mobile app with optimized image uploads, deep links to quick actions, and a unified view of the schedule.

Hyperforce

Hyperforce is the trusted foundation of the Salesforce Customer Engagement Platform.With Hyperforce, you can scale globally while meeting local compliance regulations on a foundation of security, privacy, and agility.

Industries

Accelerate productivity and drive customer success with Automotive Cloud, launching as generally available this release. Gain critical insights into your company's carbon footprint with Net Zero Cloud. Build stronger relationships with partner visits and the Service Console for Manufacturing. Get started quickly with more guided setups in Financial Services Cloud. Public Sector Solutions offers composable case management to help caseworkers deliver custom services that result in successful outcomes for individuals and families.

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.

Marketing Cloud Account Engagement

You can now take action on prospects in third-party applications via Engagement Studio programs. Plus, you have the option to run a full sync on your prospect database and you can now grant users access to most of the Account Engagement Lightning app with new permission set licensing.

Mobile

The Salesforce Mobile App updates include the upcoming retirement of two tablet experiences, forecast types now grouped by territory hierarchy, and a beta to optimize viewing mobile reports. In enhanced LWR Experience Cloud sites, custom Lightning Web Components can now have different integer property values. Mobile Publisher now has a beta to support Lightning Web Runtime (LWR) Sites for Experience Cloud, ease of configuration for navigation settings, and a kiosk mode for barcode scanner.

Revenue

Use Subscription Management to sell more subscriptions, quote prices, and manage collections. Salesforce CPQ updates improve security and performance.

Sales

Ensure efficient sales coverage when you assign leads to territories. Empower your enablement team to accelerate business outcomes with Enablement Programs. Give Einstein Conversation Insights users a great start with a new in-app welcome experience. Integrate flows with Sales Engagement cadences. And expand sales efforts into international markets with Salesforce Maps.

Salesforce CMS

Enhanced CMS workspaces are now generally available.

Salesforce Flow

New capabilities in Flow 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.

Salesforce for Slack Integrations

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

Security, Identity, and Privacy

Help your users do their jobs safely with a range of new options and security tools. Enhanced Domains enforcement begins. The Auto-Enable Multi-Factor Authentication (MFA) release update is available for orgs with fewer than 100 active users. Fine-tune how you manage consent preferences with Preference Manager, now generally available. Access even more event log file types with Event Monitoring, more security setting details with Security Center, and a host of other security enhancements.

Service

Deliver efficient, flexible service with our expanded set of Service Cloud features. Tackle customer issues as a team directly from Slack with the Service Cloud for Slack app. Enhance the Messaging for In-App and Web experience with an emoji keyboard and estimated wait time. Quantify the value of your Einstein setup with a customizable dashboard for Article Recommendations and Reply Recommendations. Include encrypted fields when you build your Case Classification model. Learn to build, launch, and extend bots in the new Learning Map. And more!

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

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
Lightning Experience offers the most current and innovative features, but we also understand that some orgs continue to use Salesforce Classic—either exclusively or in tandem with Lightning Experience as it evolves.

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

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

Use Filters to Zero In on the News That Matters Most

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

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

Edition
The feature enhancements available to you depends on your edition. Filter the release notes to show only the enhancements that are available in your edition.
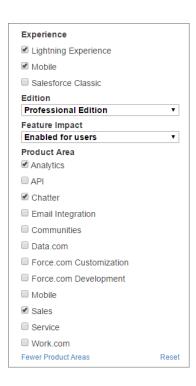
Feature Impact
Some features require you to enable or configure them before users can get the benefits. As an admin, filter the release notes to focus on or hide just those features. Or maybe you want to see only the features that are automatically enabled for your users.

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.

Experience
☑ Lightning Experience
☑ Mobile
☐ Salesforce Classic
Edition
Professional Edition ▼
Feature Impact
Enabled for users ▼
Product Area
☑ Analytics
☐ API
☑ Chatter
☐ Email Integration
☐ Communities
☐ Data.com
☐ Force.com Customization
☐ Force.com Development
☐ Mobile
☑ Sales
☐ Service
☐ Work.com
Fewer Product Areas   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

Lightning Experience offers the most current and innovative features, but we also understand that some 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 Notes Changes

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

January 19, 2023

Removed: Refresh and Enhance Your Reply Recommendations Model
> This feature isn't quite ready, so we're removing it for now. We'll let you know when it's ready.

January 2, 2023

Deploy Enhanced Domains (Release Update)

Clarified the instructions to opt out of automatic deployment in Spring '23.

Define Forecast Configurations Using Forecast Sets

Announced the new AdvAccountForecastSet metadata type.

Urge or Require Users to Update to the Latest Mobile Publisher App Version

For Aura sites, you can now show a message to your Mobile Publisher for Experience Cloud app users that encourages or requires them to update to the version of your app that supports enhanced domains. By updating their app, users can avoid any service disruptions.

DevOps Center (Generally Available)

Clarified that DevOps Center hasn't been tested and isn't recommended for enablement in Government Cloud and Government Cloud Plus.

Build Components in Mixed Shadow Mode (Developer Preview)

There was an error in the 240 documentation indicating that this feature was in beta. We corrected the 240 release note to clarify that this feature is still in Developer Preview. If you have any concerns, contact your Salesforce representative.

New and Changed Components for Change Sets

Added the Event Relay Configuration change set.

New Invocable Actions

Announced the new dynamicSendSurveyInvitation and sendSurveyInvitation invocable actions.

Get Started with Unified Health Scoring Faster by Using the Unified Health Scoring Data Kit

Added a release note for the Unified Health Scoring data kit.

Health Cloud for Life Sciences

Added Assessments to the list of available features.

December 12, 2022

Localize Your Enablement Site for Italian and Spanish (Spain)

Added a release note announcing that learners can now view an enablement site in Italian and Spanish (Spain) and content creators can localize trails and modules in those languages.

What's New in DevOps Center?

We removed information about the Salesforce CLI `deploy` commands because their launch has been delayed.

Benefit from Pub/Sub API Enhancements

Added release notes about Pub/Sub API enhancements.

Confirm Browser Version for Gmail Integration

Added updated information about the minimum browser version required for integration with Gmail.

Secure Cross-Cloud Integrations with Private Connect Across the Globe

We added two more AWS regions for Private Connect: `ap-northeast-2` (Seoul, South Korea) and `eu-north-1` (Stockholm, Sweden).

December 5, 2022

DevOps Center (Generally Available)

DevOps Center will be generally available on December 9. 2022.

Enable ICU Locale Formats (Release Update)

This release update is postponed to Spring '24.

Other Enhancements in Salesforce Maps Territory Planning

Clarified functionality for creating high-volume datasets and alignments using the Bulk API setting.

Removed: Automatically Apply Category Promotions to Variants

This feature isn't quite ready, so we're removing it for now. We'll let you know when it's ready.

Login & Registration Updates for Enhanced LWR Sites

Added a release note that describes changes made to the Login & Registration section of the Administration workspace for enhanced LWR sites.

Metadata API

Added a release note announcing the removal of the ExternalClientApplication, ExternalAppOauthConfig, ExternalAppIdTokenConfig, and ExternalAppOauthConsumerScope metadata types.

New Manufacturing Cloud Metadata Types

Added a release note announcing the new MfgServiceConsoleSettings metadata type.

November 28, 2022

Replacing the EHR Data Model with the Clinical Data Model

Added a note clarifying the impact on existing Health Cloud customers.

Accelerate Business Outcomes with Enablement Programs (Generally Available)

Enablement is available in Performance Edition. Clarified that the listed permissions refer to permission set names.

Enable Your Sales Teams to Achieve Your Company's Revenue Goals (Generally Available)

Enablement is available in Performance Edition.

November 14, 2022

Get Enhanced Messaging for Facebook Messenger (Generally Available)

Added a release note announcing Enhanced Messaging for Facebook Messenger.

Gather and Share Information Faster with Messaging Components (Generally Available)

Added a release note about a new option to send structured content in enhanced Messaging channels.

Metadata API

Added an entry announcing the new BotTemplate metadata type.

New Net Zero Cloud Metadata Types

Announced the new SustainabilityUom metadata type.

/services Is No Longer Available as a Base URL for Site Pages

Added a release note about restricting the usage of `/services` as a base URL for site pages.

Filter Custom Report Types by Salesforce Fields (Beta)

Changed supported edition to Unlimited.

Connect Enhanced Bots to Facebook Messenger (Generally Available)

Added a release note announcing the ability to connect enhanced Einstein bots to Enhanced Messaging for Facebook Messenger channels.

Metadata API

Added information about the enableDevOpsCenterGA preference in DevHubSettings.

Blur the Background on Two-Way Video Calls (Beta)

Announced that you can now blur the background on two-way video calls for Visual Remote Assistant.

Use Partitioned Domains in Non-Production Orgs

Updated this release note to reflect that partitioned domains are available in patch orgs with the develop partition name. Removed references to the partition for free orgs and references to demo orgs getting partitioned domains before Spring '23.

Release Updates

Removed the Run Flows in User Context via REST API release update from the Scheduled to Be Enforced in Summer '23 section.

November 7, 2022

Plan for Salesforce Mobile App Community License Access Retirement

Added a release note announcing the upcoming retirement of access to the Salesforce Mobile App for users with a Community License.

Review the New Timeline for Enhanced Domains

Added a release note announcing updated timing for the automatic deployment and enforcement of enhanced domains.

Deploy Enhanced Domains (Release Update)

Updated this release note with a new name and enforcement timeline.

Release Updates

Created a section for release updates with functionality that is automatically enabled in this release.

Other My Domain Changes

Updated the information and screenshot for the banner.

The Language for Enhanced Domains Was Updated

Added a release note announcing changes to the language used when referring to enhanced domains in content and the UI.

Evaluate AppExchange Solutions More Efficiently

Announced the availability of the new AppExchange listing experience.

Get the Resources You Need to Build Innovative Solutions for AppExchange

Announced the launch of the AppExchange Developer Center.

Discover Relevant AppExchange Solutions and Consultants Faster

Announced the availability of the new AppExchange search experience.

Apex: New and Changed Items

Added a release note about changes to Apex classes in the FieldService namespace.

Let Your Customers Pick Their Own Meeting Times in Gmail and Outlook Integrations

Added a release note announcing a new feature for Outlook and Gmail integrations.

Encrypt Case Referral Details

Added a release note about Shield Platform Encryption compatibility with Referral object fields.

Encrypt More Insurance Policyholder Data

Added a release note about Shield Platform Encryption compatibility with more Insurance for Financial Services Cloud fields.

Convert Dataflows to Recipes (Generally Available)

Added a release note announcing that the functionality to convert dataflows to recipes is now generally available.

Metadata API

Added entries to announce the new `recordName` field on the BotInvocationMapping subtype of the existing BotVersion metadata type, the new `messageDefinition` field on the BotStep subtype of the existing BotVersion metadata type, and the new ConversationDefinitionRichMessage subtype of the existing BotVersion metadata type.

View, Create, and Manage Content in Enhanced CMS Workspaces

Updated the release note and the screenshot to reflect UI changes in enhanced CMS workspaces. The feature to view translated content variants from the dropdown arrow isn't quite ready, so we're removing it while we make improvements.

Simplify the Content Translation Lifecycle with Enhanced CMS Workspaces

Updated the screenshot to reflect UI changes in enhanced CMS workspaces. The feature to view translated content variants from the dropdown arrow isn't quite ready, so we're removing it while we make improvements.

October 31, 2022

Encrypt Participant Comments in Financial Services Cloud

Added a release note about Shield Platform Encryption compatibility with Comments fields on the Account Participant and Object Participant objects.

Delete Connected LinkedIn Member Accounts More Easily

Added a release note about changes to the way connected LinkedIn member accounts are deleted in Setup.

Update Your Packages for Enhanced Domains and Partitioned Domains

Added a release note announcing new content for partners to update their packages for recent domain changes.

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

Changed the release update enforcement date to Winter '24.

Metadata API

Added a release note that starting in November 2022, consumer secrets in auth providers must be entered as plaintext, not as encrypted text. Existing consumer secrets that were entered as encrypted values can be deployed throughout Winter '23. Consumer secrets are exported as placeholder values.

Encrypt Data Shared in Video Visits

Added a release note about Shield Platform Encryption compatibility with data shared during video visits.

Invocable Actions

Added a release note about the new Apply Lead Assignment Rules invocable action.

Lower Costs and Increase Healthcare Access with Virtual Care

Added to the release notes for Virtual Care that Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States.

Find Your Reports and Dashboards Faster in Analytics Home

Added a note that this is an enhancement to a beta feature.

Browse and Search in Analytics Home

Added a note that this is an enhancement to a beta feature.

October 24, 2022

Improve Contact Center Operations with Efficient Shift Scheduling

Announced the availability of Shift Scheduling.

Upgrade SAML Single Sign-On Framework (Release Update)

Changed the title and content of the release note to match the release update. Previously, the release note was titled Upgrade Your SAML Framework (Release Update).

Upload Images Faster with Optimized Image Upload

Corrected the details and replaced the image.

Get an ordered batch of segments

Added new functionality to Connect REST API and Connect in Apex.

October 17, 2022

Access to Site.com Studio Was Removed from LWR Sites

The link to Site.com Studio, which is unsupported for Lightning Web Runtime sites, was removed from the Workspaces | Administration section of LWR sites.

Removed: Improve Your Site's Security When Using CDN for Digital Experiences

This feature isn't quite ready, so we're removing it for now. We'll let you know when it's ready.

Metadata API

Added information about the new `enableEnhancedSitesAndContentPlatform` field on the SiteSettings metadata type.

Metadata API

Updated the release note to announce the new ExternalCredential metadata type.

Refine Data Extraction by Using Record Type Field Mapping (Intelligent Document Reader)

Added a release note to announce that extracted form fields can be mapped to any target object's record type fields.

Intelligent Document Reader Has a Changed Object

Updated the release note to announce a new field on the OcrTargetObject object.

Intelligent Document Reader Has a Changed Tooling Object

Updated the release note to announce a new field on the existing OcrTargetObject tooling object.

Refine Data Extraction by Using Record Type Field Mapping (Intelligent Form Reader)

Added a release note to announce that extracted form fields can be mapped to any target object's record type fields.

Intelligent Form Reader Has a Changed Object

Updated the release note to announce a new field on the OcrTargetObject object.

Intelligent Form Reader Has a Changed Tooling Object

Updated the release note to announce a new field on the existing OcrTargetObject tooling object.

Intelligent Document Reader Has an Update to the Connect REST API Response Bodies

Updated the release note to announce a new property on the responses of the OCR Template and OCR Template Details.

Intelligent Form Reader Has an Update to the Connect REST API Response Bodies

Updated the release note to announce a new property on the responses of the OCR Template and OCR Template Details.

Intelligent Document Reader Has a Changed Metadata Type

Updated the release note to announce a new field on the OcrTargetObject metadata type.

Retain Data After Deleting a Data Stream

Updated the release note to announce the new feature decoupling of S3 data streams and data lake objects.

Intelligent Form Reader Has a Changed Metadata Type

Updated the release note to announce a new field on the OcrTargetObject metadata type.

Life Events or Business Milestones Has a New Name

Announced the name change of the Life Events or Business Milestones component and Setup page.

Automotive Cloud (Generally Available)

Added release notes to announce the general availability of Automotive Cloud, which helps automotive companies manage vehicles, customers, dealers, and financial relationships.

Metadata API

Added a release note to introduce SandboxSettings.

Enable Marketing Cloud Push Notifications

New section in Mobile Publisher Setup to enable Marketing Cloud push notifications.

Create Self-Service Kiosk Applications—A New Use Case for BarcodeScanner

Enhancement to the BarcodeScanner Lightning Web Component for kiosk mode.

Managing a Device's Calendar Events Using Lightning Web Components

New CalendarService Lightning Web Component.

Disable Email Notifications for Inactive Sandboxes

Opt out of receiving email notifications when a sandbox is about to expire.

October 10, 2022

Invalid Nested Templates No Longer Render

Added screenshots for invalid template warnings and fixed inaccuracies in the release note.

Other Enhancements in Salesforce Maps Territory Planning

Added details for controlling who can publish alignments to active models in Enterprise Territory Management.

Encrypt More Service Cloud Voice Fields

Added a release note about Shield Platform Encryption compatibility with fields on the MessagingEndUser and VoiceCall objects.

Discover Einstein Vision and Language Docs on Salesforce Developer Docs

Added a release note to announce the availability of Einstein Vision and Language Docs on Salesforce Developer Docs.

October 3, 2022

MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)

Revised information about which orgs are to have multi-factor authentication (MFA) automatically enabled in the Spring '23 release.

New and Changed Objects

Added release notes to announce a new field on the PendingServiceRouting object.

Add Automation to Sales Engagement Easily with Included Flow Templates

Removed Update Cadence Target Assignee from the list of included flow templates.

New and Changed Objects

Updated information in the ApptBundlePolicy object.

Connect REST APIs

Added Connect REST APIs for Loyalty Management.

Other Improvements to Email-to-Case

Updated release note about the additional Outlook-specific header that Email-to-Case uses to identify a related case.

Review Hourly Send Limits for Single Emails

Added information on updated send limits for single emails.

Stay on Top of Complex Projects with Enhanced Scheduling and Optimization

Updated the Get Ready for Enhanced Scheduling and Optimization link.

Get Available Time Slots Fast with Gradeless Appointment Booking

Updated the Get Ready for Enhanced Scheduling and Optimization link.

Gain Insights on How a Service Appointment Was Scheduled

Updated the Get Ready for Enhanced Scheduling and Optimization link.

View Travel Mode Details Easily on the Gantt Resource Map

Updated the Get Ready for Enhanced Scheduling and Optimization link.

Get Additional Supported Features with Enhanced Scheduling and Optimization

Updated the Get Ready for Enhanced Scheduling and Optimization link.

Review Prior Authorization Requests with Utilization Management

Added release note for the new prior authorization review process.

Health Cloud Has New and Changed Objects

Added information on the new fields in the Utilization Management data model.

My Domain Login Page Was Changed

Added a release note announcing a change to the My Domain login page.

Build and Share

Added new release note for the Insight Builder enhancements.

Edit a Calculated Insight

Added information about the new edit feature.

Save a Calculated Insight as a Draft

Added information about the new save as draft feature.

Clone a Calculated Insight

Added information about the new clone feature.

Execute a Calculated Insight Immediately

Added information about the ability to quickly execute a calculated insight.

Auto-Populate Join Keys

Added information about the ability to auto-populate join keys to link DMOs.

Refresh the Patient Card

Added new release note for the Health Cloud Patient Card manual refresh button and refresh by publishing a Platform Event.

September 26, 2022

Plan for a My Domain Change

Added a release note to announce new content in Salesforce Help.

Consumer Goods Cloud

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

Use Lightning Web Security by Default in New Salesforce Orgs

Added information about scratch orgs.

Mask Data in Privacy Center Policies with Static Values

Announced a new option for masking data in Privacy Center retention policies.

Filter Retention Policy Fields by Compliance Categorization, and Use Bulk Actions to Mask or Delete Fields

Announced the new compliance categorization details in Privacy Center retention policies.

Synchronize Component Data Without a Page Refresh by Using RefreshView API (Pilot)

Removed support for custom components in this release.

Lightning Components

Removed the reference to light DOM in the Lightning Components section description.

Release Updates

Moved Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update) to the Scheduled to Be Enforced in Summer '23 section.

Metadata API

Added information about the `lockerServiceNext` and `lockerServiceCSP` fields.

Accelerate Business Outcomes with Enablement Programs (Generally Available)

Added a release note to announce the general availability of Enablement, which provides new capabilities for building, launching, and tracking programs that drive targeted business outcomes.

Get Quicker Search Results with Data Processing Engine in Provider Search

Updated information about how Provider Search in Health Cloud uses Data Processing Engine.

New and Changed Objects

Added information about the new CollaborationRoom, Swarm, and SwarmMember objects.

Access Optimal Views on Mobile with Enhanced Reports (Beta)

Added See Also to help documentation.

API

Removed the release note about adding the `__gvs` suffix to a global value set or global value set translation when programmatically accessing them because the feature was removed from the Winter '23 release. If you modified a package.xml manifest file that contains global value sets or global value set translations and added the suffix, be sure to remove those changes.

Move Through Dashboards with a Single Click (Beta)

Added a release note to announce the beta availability of Select and Navigate, which provides single click interaction in chart widgets for dynamic navigation.

Save Higher Volumes of Predictions More Quickly (Generally Available)

Updated information regarding the default limit. Changed from `2 million` to `5 million`.

The Back Up and Restore Feature in Salesforce Authenticator Is Limited to Salesforce Users

Added details about this feature limitation.

Add Multiple Entries for the Same Child Product

Added a release note.

Create More Complex Nested Bundles

Added a release note.

Get More from Automation in Salesforce Authenticator

Added a release note to announce improvements to the automation feature in Salesforce Authenticator.

Learn How to Apply the Consent Data Model to Marketing Cloud Communications

Added a release note to announce the new Respect Consent Preferences in Marketing Cloud with the Consent Data Model solution kit.

Ask for Help More Easily with Slack Posts

Removed the Service Cloud for Slack app release note about Help Needed posts appearing as a separate message in the swarm channel because the feature was removed from the Winter '23 release.

Verify Your Email Address to Send Email Through Salesforce

Clarified that this update isn't enforced for paying customers that use SSO.

Stream Salesforce Events to Amazon EventBridge in AWS (Generally Available)

Mentioned that Event Relay isn't available in Government Cloud.

Invalid Nested Templates No Longer Render

Added that invalid template usage is ignored and isn't rendered in the DOM.

Enable Stronger Protection for Your Users' Personal Information (Release Update)

Updated release note to reflect postponed enforcement of release update until the Spring '23 release.

Removed: Hide First and Last Name Fields in SOAP API Is Being Retired

Removed this Experience Cloud release note because this feature is no longer being retired in the Winter '23 release.

Removed: Manage Access to Personally Identifiable Information

Removed this Experience Cloud release note because the Hide Personal Information feature is no longer being retired in the Winter '23 release.

New and Changed Objects

Added release notes describing the changes to the Engagement data model.

Engagement Connect REST API

Added release notes about the new Engagement Connect REST API that can be used to create, delete, or get an engagement attendee, interaction, and topic.

New and Changed Metadata Types

Added release notes describing the changes to the `IdentityVerificationProcDtl` and `IdentityVerificationProcFld` metadata types.

Tooling API New and Changed ObjectsNew and Changed Metadata Types

Added release notes describing the changes to the `IdentityVerificationProcDtl` and `IdentityVerificationProcFld` tooling objects.

Intelligent Document Reader Has New Metadata Types

Added release notes to announce the new fields that are added to the `OcrTemplate` and `OcrSampleDocument` metadata types.

Intelligent Form Reader Has New Metadata Types

Added release notes to announce the new fields that are added to the `OcrTemplate` and `OcrSampleDocument` metadata types.

Chatter Free and Chatter External Users Are Automatically Excluded from MFA Auto-Enablement and Enforcement

Added a release note to announce a change in multi-factor authentication (MFA) behavior for Chatter Free and Chatter External users.

September 19, 2022

Consumer Goods Cloud

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

September 12, 2022

New Functions Supported in Expression Sets

Added details about the support for the CONTAIN function.

New and Changed Objects

Added a release note to announce the behavior change to the `FSL__Schedule_Mode__c` custom field on the ServiceAppointment object.

Added information about the new `Drag and Drop`, `Schedule`, `Global Optimization`, `In-Day Optimization` and `Resource Optimization` picklist values for the `FSL__Schedule_Mode__c` field on the ServiceAppointment object.

Verifiable Credentials Management (Pilot)

Added a release note to announce the Verifiable Credentials Management Pilot

Schedule Multiple Appointments Concurrently

Updated the release note to include information about lead times of work procedure steps.

Advanced Therapy Management

Updated the release note to include information about site-to-site relationships set up for service territories.

Access the Appointment Booking Screen with the Appointment Slot Lightning Component

Updated the short description to specify names of the available buttons.

New and Changed Objects

Added updates to FlowDefinitionView documentation.

Self-Provision the Connection Between B2C Commerce and Order Management

Added information about activating the integration in B2C Commerce.

Fix Invalid HTML Syntax to Avoid Component Loading Errors

Updated the list of warnings and added a screenshot.

Use Your Account to Update Your Shipping Address

Added release note about Your Account App.

September 5, 2022

OmniStudio

Added a release note to announce that the SDK data source on a FlexCard isn't supported when Standard OmniStudio Runtime is enabled.

New Invocable Actions in Manufacturing Cloud

Added a release note to announce about the new massUpdateAdvAccountForecast invocable action for Manufacturing Cloud.

Make More Calls with Service Cloud Voice

Added a release note to announce increased call limits to 10,000 concurrent voice calls.

DevOps Center (Generally Available)

DevOps Center is in beta and publicly available.

Validate Getter and Setter Access Modifier Enforcement during Visualforce Expression Language Parsing (Release Update)

This release update has been postponed indefinitely and is not enforced in its present form.

New and changed Loyalty Management Metadata Types

Added a release note to announce the new fields on the existing LoyaltyProgramProcessAction and LoyaltyProgramProcessActionParameter metadata subtypes of the LoyaltyProgramSetup metadata type.

New and Changed Objects

Added a release note to announce the new `StepAutomationReference`, `IsStepAutomationActive`, and `TypeDetail` fields on the ActionCadenceStep object.

Added a release note to announce the new `ActionCadenceAutolaunchedFlow` and `ActionCadenceStepFlow` picklist values for the `ProcessType` field on the FlowDefinitionView and FlowVersionView objects.

Add Automation to Sales Engagement Easily with Included Flow Templates

Added a release note to announce the new included flow templates for Sales Engagement.

Perform Actions with Flow When Reps Complete a Cadence Step

Added information about included cadence autolaunched flow templates.

New and Changed Objects

Updated the release note to announce the new and changed object for Intelligent Document Reader.

New and Changed Objects

Updated the release note to announce the new and changed object for Intelligent Form Reader.

New and Changed Objects

Added release notes to announce the new BroadcastTopic and BroadcastTopicNetwork objects.

Upgrade to Identity Connect 7.1.3

Added a release note for a new Identity Connect upgrade.

Activate Enhanced Domains for a B2C Commerce Integration

Updated the release note to specify that the requirement only applies to non-production orgs.

Hide More Sensitive Emails on the Activity Timeline

Moved the release note to under Einstein Activity Capture.

Care Coordination for Slack

Added release notes for the Care Coordination for Slack app.

Identity Verification

Added release notes for Identity Verification.

Health Cloud Has New and Changed Objects

Updated the field names for Advanced Therapy Management objects.

Schedule Appointments When No Slots Are Published

Added a release note topic for Advanced Therapy Management.

Schedule Multiple Appointments Concurrently

Updated the release notes to indicate that the Appointment Slots Lightning App Builder component can also be added to the record pages of the Account, Case, or Opportunity objects.

Easily Cancel and Reschedule a Series of Appointments

Updated the release notes to indicate that the Appointment Slots Lightning App Builder component can also be added to the record pages of the Account, Case, or Opportunity objects.

August 29, 2022

Quickly Locate Unused Files

Added a release note about a new field on the Files list view.

Financial Services Cloud Community Licenses

Added a release note about Community Licenses.

Create a Financial Services Cloud Pre-Release Trial Org

Added a release note about the pre-release trial.

Specify Trusted Domains for Clickjack Protection on Your Site

Clarified that this feature isn't available for enhanced LWR sites.

Enable Third-Party Integrations with Light DOM (Beta)

Light DOM is generally available only for Experience Cloud.

Make Sure Agents Don't Miss Incoming Calls with an Orange Tab

Added release notes to announce the orange tab feature for Service Cloud Voice.

Encourage Ongoing Engagement with New Ranger Ranks

Added a release note about new ranger ranks available for enablement site user profiles.

Use Loyalty Program Process Aliases

Added a release note about aliases in Promotion Setup.

Use Order Data Directly Instead of Using Salesforce Order Management

Added a release note to announce the capability to use Loyalty Management for Commerce without Salesforce Order Management.

Get More Outcomes From Your Decision Tables Every Hour

Added a release note to announce the increased limits of decision tables.

Use Guided Setup to Enable Video Visits

Added release note about the guided setup for Video Visits.

Advanced Therapy Management

Added release notes about the new Health Cloud feature, Advanced Therapy Management.

Health Cloud Has New and Changed Objects

Added the new and changed objects for Advanced Therapy Management.

Health Cloud

Added details about the new Health Cloud feature, Advanced Therapy Management.

Health Cloud for Life Sciences

Added Advanced Therapy Management to the list of features included in Health Cloud for Life Sciences.

New and Changed Objects

Added a release note to announce the new TravelMode object for Field Service.

Added a release note to announce the new FlowOrchestrationInstanceSharingRule object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationInstanceShare object for Salesforce Flow.

Added a release note to announce the new OwnerId field for the FlowOrchestrationInstance object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationStageInstanceSharingRule object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationStageInstanceShare object for Salesforce Flow.

Added a release note to announce the new OwnerId field for the FlowOrchestrationStageInstance object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationStepInstanceSharingRule object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationStepInstanceShare object for Salesforce Flow.

Added a release note to announce the new OwnerId field for the FlowOrchestrationStepInstance object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationWorkItemSharingRule object for Salesforce Flow.

Added a release note to announce the new FlowOrchestrationWorkItemShare object for Salesforce Flow.

Added a release note to announce the new OwnerId field for the FlowOrchestrationWorkItem object for Salesforce Flow.

Self-Schedule Video Calls

Edited the release note to include the requirement of the Video Calls Add-On license.

Lower Costs and Increase Healthcare Access with Virtual Care

Edited the release note to include the requirement of the Video Calls Add-On license.

August 22, 2022

Metadata API

Added a release note to announce the new `fallbackQueue` and `routingFlow` fields on the existing EmailToCaseRoutingAddress metadata subtype of the CaseSettings metadata type.

Track and Sort All Your Tasks with the To Do List
> Clarified that the To Do List is available to all users. Sales Engagement users also see cadence tasks in the To Do List.

Simplify Prospect Opt-Out Status Between Account Engagement and Salesforce
> Added a When section to clarify release date for this change.

Marketing Cloud Account Engagement
> Renamed and repositioned Marketing Cloud Account Engagement in the main Release Notes table of contents.

Chart Your Apex Course with the Save Order of Execution Diagram
> Corrected the link to the Apex Developer Guide.

August 15, 2022

Salesforce Winter '23 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 #Winter23Feedback.

- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback buttons and vote up or down. Add comments if you have them.

- **Twitter**—When you follow @salesforcedocs on Twitter, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Tweet us at @salesforcedocs.

Get Ready for the Release

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

What's New This Release

- Key Dates for the Winter '23 Sandbox Preview. See key dates for the release.

- Release Overview Deck (ROD). Create internal training for your users, review setup screens, and learn how to use features.

- Release Matrix. Quickly see which features immediately affect your users.

- Winter '23 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.

- Winter '23 Release Website. Check out the new features.

- Winter '23 Release Highlights Module. Get the Summer '21 Trailhead badge.

- Release in a Box. Use this kit to prepare and present the new release to your org and users.

Release Readiness Essentials

- Release Readiness Trailblazers. Access resources and experts for all things release readiness.

- Trust Status Maintenances. See sandbox and other release dates and times. Click **Instances** and your instance to see your maintenance dates.
- Sandbox Refresh Calculator. Plan if and when you need to refresh your existing sandbox orgs.
- Sandbox Preview Video. Learn how to navigate the sandbox preview process.
- Sandbox Preview Instructions. Get early access to new features in your sandbox.
- Certification Release Maintenance Schedule. Keep your certification updated in Trailhead.
- Prepare for Salesforce Releases. Use Trailhead to create your release strategy.

How and When Do Features Become Available?

Some features in Winter '23 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers and Devices for Lightning Experience	✅			
Supported Browsers and Devices for Salesforce Classic	✅			
Supported Browsers for CRM Analytics	✅			

Salesforce Overall

Learn about new features and enhancements that affect your Salesforce experience overall.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Be Ready for Multi-Factor Authentication Auto-Enablement			✅	
Keep Working with Tab-Focused Dialogs (Release Update)			✅	
Secure Components by Default with Lightning Web Security in New Orgs	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize Utility Panel Resizing Animation by Using a Timing Function, Function Duration, and Function Delay	✅			
Create Custom Address Fields (Generally Available)		✅		
Use Your Account to Update Your Shipping Address	✅			
User Engagement Release Notes are Now in the Guidance and Enablement Section			✅	
Customer Lifecycle Analytics: Response Analysis				
Analyze Customer Feedback to Matrix Questions	✅			
Feedback Management Now In Service Cloud!	✅			
Salesforce Scheduler				
Schedule Recurring Shifts			✅	
Connect with Customers from Anywhere			✅	
Let Service Resources Add Multiple Topics to a Shift			✅	
Other Changes to Salesforce Scheduler			✅	
Create a Salesforce Scheduler Pre-Release Trial Org			✅	
Einstein Search				
Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)	✅			
Resolve Cases Quickly with Interactive Einstein Search Answers (Pilot)	✅			
Salesforce Data Pipelines				
Other Enhancements to Data Pipelines	✅			

Analytics

Browse and subscribe to Lightning reports and dashboards in Slack, and demystify report creation with custom report type details. Speed up data preparation with data templates, save time with ready-to-deploy Customer Insights Service and Case dashboards, and embed multiclass predictions in a dataset during data prep.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Collaborate Around Data with Lightning Reports and Dashboards in Slack			✅	
Subscribe to Lightning Reports and Dashboards Directly in Slack			✅	
Review a Custom Report Type's Structure During Report Creation	✅			
Find Your Reports and Dashboards Faster in Analytics Home			✅	
Access Optimal Views on Mobile with Enhanced Reports (Beta)	✅			
Filter Custom Report Types by Salesforce Fields (Beta)				✅
CRM Analytics				
Data Integration				
Find Formula Date and Time Functions Faster	✅			
Take the Guesswork out of Foreign Keys with Join Recommendations		✅		
Reproduce Nodes with Copy and Paste		✅		
Update Recipe Versions Immediately in Data Prep		✅		
Select Input Data Easily with Improved Data Category Names		✅		
Self-Join Nodes in Data Prep		✅		
Convert Dataflows to Recipes (Generally Available)	✅			
Use Multiclass Models in Discovery Predict	✅			
Use Event-based Scheduling with External Connections (Beta)		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Started Faster with Data Templates (Generally Available)				✅
Categorize Selected Text into Sentiments (Generally Available)				✅
Prebuilt Templates and Apps				
Get Started Fast with the Service Performance Dashboard	✅			
Dive into Your Metrics with the Case Embedded Dashboard	✅			
View Analytics from Anywhere with Mobile Sales and Service Performance Dashboards	✅			
Customize Row Level Security Settings and Choose a Custom Opportunity Amount from the Configuration Wizard	✅			
Build Rich Custom Dashboards with the FSC Wealth Component Library	✅			
Analyze Order Management Trends by Using Order Tracking Analytics			✅	
Improve Business by Using Analytics for Consumer Goods - Advanced Data Model			✅	
App Building				
Make Real-Time Decisions with the Input Widget	✅			
Move Through Dashboards with a Single Click (Beta)				✅
Launch Explorations for Customer Data Platform with a Single Click	✅			
Build Queries Easily with the Improved Fields Panel	✅			
Make Live Connections to Snowflake More Secure (Beta)	✅			
Add Lightning Reports to Your Dashboards with Direct Report Queries	✅			
Experience Improved Responsiveness While Editing Dashboards with Multiple Pages	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Pivot Table Enhancements (Beta)	✅			
Einstein Discovery				
Make Predictions with Live Snowflake Data	✅			
Identify a Model's Most Important Variables	✅			
Get Fine-Grain Model Performance (Pilot)				✅
Estimate Story Run Time (Pilot)				✅
Bring Your Scikit-learn Model to Salesforce	✅			
Save Higher Volumes of Predictions More Quickly (Generally Available)			✅	
Deepen Your Model Evaluation with New and Improved Model Metrics	✅			
Embed Multiclass Predictions in Your Dataset During Data Prep	✅			
Get Predictions, Improvements, and Top Factors in Slack			✅	
Analytics for Everyone				
Browse and Search in Analytics Home	✅			
Quickly Return to Recent Search Insights	✅			
Explore Recommended Insights on the Search Page	✅			
Collaborate More Effectively with CRM Analytics for Slack			✅	
Publish Tableau Online Content to CRM Analytics (Beta)				✅

Commerce

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
B2B and B2B2C Commerce				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Global Sales				
Use Multiple Languages in a B2C Store		✅		
Sell Globally in More Countries		✅		
Offer Language Options in a B2C Store	✅			
Quickly Set Up Taxes for a Store		✅		
Commerce Promotions				
Set a Promotional Price for Products	✅			
Deduct a Fixed Amount from an Entire Order	✅			
Bring on the BOGO Deals	✅			
Apply Limits to Promotions	✅			
Promotion Priority Rules Include Tiebreakers	✅			
Product Import				
Get More Guidance During a CSV Import		✅		
See Which Records Are Updated During Store Import		✅		
Search the Product Workspace		✅		
Use the Connect API for Commerce Subscriptions	✅			
Create a Convenient, Flexible Experience with the My Account Theme Layout in Your B2C Store	✅			
Use Dynamic Expressions in Text Fields in Your B2C Stores		✅		
Let Non-Admin Users Delete Account Addresses	✅			
More Easily Migrate Your B2C Store's Configuration		✅		
Add a B2C Store to an Experience Cloud Site				
Understand SEO for B2B and B2B2C Commerce			✅	
Salesforce Order Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Order on Behalf of a Shopper		✅		
Easily Pick and Pack Online Orders		✅		
Ingest B2C Commerce Orders at High Scale			✅	
Automatically Reroute Rejected Fulfillment Orders with the Distributed Order Management Flows			✅	
Sequence Payment Methods When Processing a Refund		✅		
Charge Return Fees		✅		
Specify a Reason When Rejecting a Fulfillment Order Line Item		✅		
Configure Delivery and Apply Payment Promotions When Adding an Item to an Existing B2C Commerce Order		✅		
Self-Provision the Connection Between B2C Commerce and Order Management		✅		
Efficiently Handle B2C Commerce Orders When Omnichannel Inventory Is Unavailable			✅	
Find Order Management Implementation Instructions More Easily		✅		
Activate Enhanced Domains for a B2C Commerce Integration		✅		
Salesforce Payments				
Make Store CheckOut Easy with Salesforce Payments			✅	
Provision a Salesforce Payments Account for Payments Features			✅	
Gain Financial Insights from Payment Reports and Charts			✅	
Add Credit Card Payments to Your Store with a Few Clicks			✅	

Customer Data Platform

Customer Data Platform, formerly known as Salesforce CDP, helps you create a single source of truth (SSOT) so you can get to know your customers and engage with relevance. Admins can use the CRM Analytics dashboards to augment your analysis without moving the data from Customer Data Platform.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce CDP Has Been Changed to Customer Data Platform	✅			
Retain Data After Deleting a Data Stream	✅			
Access CRM Analytics with One Click	✅			
Identify Skipped Ruleset Jobs		✅		
Identify Problems with Identity Resolution Rulesets		✅		
Build and Share				
Save a Calculated Insight as a Draft	✅			
Edit a Calculated Insight	✅			
Clone a Calculated Insight	✅			
Execute a Calculated Insight Immediately	✅			
Auto-Populate Join Keys	✅			
Reuse Segments (Beta)	✅			
Narrow Segments with Exclusion Criteria (Beta)	✅			
Accelerate Data Processing Between Customer Data Platform and Tableau (Pilot)	✅			

Customization

Make your account, contact, and opportunity Lightning pages more robust and flexible with Dynamic Forms. Use the Salesforce Connect adapter for Amazon Athena, now generally available, to access Athena's capability to run queries against data directly in Amazon S3. Improve address data accuracy and provide a better user experience with Custom Address Fields, now generally available.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning App Builder				
Enhance More Object Record Pages With Dynamic Forms		✅		
New Default Behavior When Migrating a Record to Dynamic Forms		✅		
Do More with Dynamic Related List Filters		✅		
Salesforce Connect				
Connect Securely to Amazon Athena and Perform Interactive Queries from Salesforce (Generally Available)			✅	
Support Efficient Access to Sorted Data Sets with Secondary Indexes			✅	
Perform Async DML Operations for Cross-Org Adapter with Corrected External Object IDs	✅			
Fields				
Deliver to Your Customers with Custom Address Fields (Generally Available)		✅		
Clean Up Inactive Picklist Values (Beta)		✅		
Bulk Manage Picklist Values (Beta)		✅		
Globalization				
Enable ICU Locale Formats (Release Update)			✅	
Prepare for Locale Format Changes	✅			
Review Updated Time Zones	✅			
Review Updated Label Translations	✅			
Prepare for the Japanese Katakana Style Change	✅			
Conduct Business with the New Leone	✅			
Permissions				
Enable Permission Set Expiration and Enhanced UI (Release Update)		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Your Permission Assignments with the User Access and Permissions Assistant			✅	
Set Field-Level Security for a Field on Permission Sets Instead of Profiles During Field Creation (Beta)			✅	
Sharing				
Enable Stronger Protection for Your Users' Personal Information (Release Update)		✅		
Try Scoping Rules in Performance and Unlimited Editions		✅		
Allow Multiple Values in Restriction or Scoping Rule Record Criteria		✅		
Discover the 45 New Objects Related to Sharing and Sharing Hierarchy Actions		✅		
Scoping Rules Apply Only to SOQL, Reports, and List Views	✅			
External Services				
Submit Your API Spec with Two New Registration Options		✅		
Validate Your Schema During Registration		✅		
Invoke External Services Registered Actions From Omnistudio Assets		✅		
View an Action's Unique Apex Name		✅		
View Apex Names in Apex Class Viewer		✅		
Import MuleSoft Anypoint APIs from Child Business Groups		✅		
Use External Services for MuleSoft RPA to Generate Actions (Generally Available)		✅		
Data Loader				
Download Data Loader v56 Installer Files From a New Location		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Revert Data Loader Settings to Disable OAuth Login from Browser		✅		
Einstein Prediction Builder				
Start Building with the Einstein Prediction Builder Learning Map			✅	
AppExchange				
Discover Relevant AppExchange Solutions and Consultants Faster	✅			
Evaluate AppExchange Solutions More Efficiently	✅			
General Setup				
Clone Lightning Apps (Beta)		✅		

Deployment

Send customizations from one org to another by adding these components to change sets.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Components for Change Sets		✅		

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)		✅		
Create Overlays with the New Modal Component		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Fix Invalid HTML Syntax to Avoid Component Loading Errors		✅		
Invalid Nested Templates No Longer Render		✅		
Remove Non-Global Design Tokens in CSS		✅		
Synchronize Component Data Without a Page Refresh by Using RefreshView API (Pilot)				✅
Use Lightning Web Security by Default in New Salesforce Orgs		✅		
API Distortion Changes in Lightning Web Security			✅	
Access iframe Content in Lightning Web Security			✅	
Build Components in Mixed Shadow Mode (Developer Preview)		✅		
Create Self-Service Kiosk Applications–A New Use Case for BarcodeScanner		✅		
Managing a Device's Calendar Events Using Lightning Web Components		✅		
Enable Secure Static Resources for Lightning Components (Update, Postponed)			✅	
Einstein Vision and Language				
Discover Einstein Vision and Language Docs on Salesforce Developer Docs	✅			
Visualforce				
Prevent Consecutive API Navigation Calls (Release Update)		✅		
Enable Visualforce JavaScript Remoting Enforcement (Release Update)		✅		
Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Escape the Label Attribute of \<apex:inputField\> Elements to Prevent Cross-Site Scripting in Visualforce Pages (Release Update)			✅	
Validate Getter and Setter Access Modifier Enforcement during Visualforce Expression Language Parsing (Release Update)		✅		
Apex				
Use DataWeave in Apex to Enable Data Transformation to Different Formats (Developer Preview)		✅		
Secure Even More Apex Code with User Mode Database Operations (Beta)		✅		
Write Clear and Intentional Apex Assertions		✅		
Chart Your Apex Course with the Save Order of Execution Diagram		✅		
Limits on Concurrently Open Query Cursors are Removed		✅		
Get Org Limit for Daily Maximum Apex Test Classes		✅		
Call Invocable Actions from Apex (Generally Available)			✅	
API				
Prevent Record Duplication with Idempotent Record Writes for UI API (Beta)		✅		
Enjoy Longer Access to More Query Results		✅		
Get Daily Limit for Running Apex Test Classes Asynchronously				
Legacy API Versions 21.0 Through 30.0 Are Being Retired (Release Update)			✅	
Packaging				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Transfer Package Ownership to a Different Dev Hub (Beta)				✅
Update Your Packages for Enhanced Domains and Partitioned Domains		✅		
Implement More Feature Parameters		✅		
Understand Component Behaviors in Managed Packages	✅			
Development Environments				
Disable Email Notifications for Inactive Sandboxes			✅	
Identify Which Sandboxes Get a Preview of the Next Salesforce Release		✅		
Quickly Clone Developer and Developer Pro Sandboxes		✅		
Platform Development Tools				
Develop Platform Apps with Ease Using Visual Studio Code and Salesforce CLI		✅		
Develop from Anywhere Using Salesforce Code Builder (Beta)		✅		
DevOps Center (Generally Available)				
Manage and Release Changes with DevOps Center (Generally Available)			✅	
What's New in DevOps Center?			✅	
Salesforce Functions				
Salesforce Functions Updates				✅
AppExchange Partners				
Get the Resources You Need to Build Innovative Solutions for AppExchange	✅			
Change Data Capture				
Filter Your Stream of Change Events (Generally Available)		✅		
Add More Enriched Fields in a Channel for the Same Selected Entity		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Platform Events				
Filter Your Stream of Platform Events with Custom Channels (Generally Available)		✅		
Monitor Your Platform Event Usage in the User Interface		✅		
Monitor Your Daily Event Delivery Usage with REST API		✅		
Event Bus				
Stream Salesforce Events to Amazon EventBridge in AWS (Generally Available)		✅		
Develop Event-Driven Apps with Pub/Sub API (Generally Available)		✅		
Benefit from Pub/Sub API Enhancements		✅		

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enablement				
Accelerate Business Outcomes with Enablement Programs (Generally Available)			✅	
Guidance Center and In-App Guidance				
Help Users with More Targetable Locations and Backdrop		✅		
Get Help from the Guidance Center		✅		
Learn About Salesforce In-App Content		✅		
Discover More Guidance Sets for Admins		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enablement Sites (myTrailhead)				
Standardize on Enablement Site Terminology in Setup		✅		
Encourage Ongoing Engagement with New Ranger Ranks		✅		
Localize Your Enablement Site for Italian and Spanish (Spain)		✅		

Experience Cloud

Discover a more flexible way to work with enhanced LWR sites and CMS workspaces, now generally available. Search across content, partially deploy a site, enjoy updated content management options, and more, all on one unified platform. Create branded mobile apps in your LWR sites and use improved navigation settings in Mobile Publisher. Unlock better site performance with enhanced domains, Apex caching, and micro-batching.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Do More with the Enhanced Sites and Content Platform (Generally Available)				
Enhanced CMS Workspaces				
View, Create, and Manage Content in Enhanced CMS Workspaces		✅		
Simplify the Content Translation Lifecycle with Enhanced CMS Workspaces		✅		
Content Variant Page Layout Was Updated			✅	
Create Collections from Enhanced CMS Workspaces		✅		
Use Sidebar Extensions in the Revamped Content Editor in Enhanced CMS Workspaces			✅	
View a List of Related Content Before You Unpublish in Enhanced CMS Workspaces		✅		
Updated Requirements for Video Content in the Enhanced CMS		✅		
Enhanced LWR Sites				
Deploy Partial Site Content via Change Sets		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search for Content Within Components in Your Enhanced LWR Sites		✅		
Create Custom Components to Retrieve Enhanced CMS Content		✅		
Assign Different Property Values for Desktop, Tablet and Mobile in Custom Lightning Web Components		✅		
Upgrade Your Site Deployments with New Metadata API Types (Beta)		✅		
Login & Registration Updates for Enhanced LWR Sites		✅		
Aura and LWR Sites				
Allow Site Visitors to Complete Work with the Flow Orchestration Work Guide Component		✅		
Enjoy Improved User Experience on Multilingual LWR Sites	✅			
Fine-Tune Your Site Spacing with New and Updated Options for LWR Sites	✅			
Offer Your Users Easy File Downloads from Custom Components		✅		
Secure Components by Default with Lightning Web Security in New Orgs		✅		
Access to Site.com Studio Was Removed from LWR Sites	✅			
Components				
Add Enhanced CMS Collections and Record List Data to LWR Sites with the Grid Component		✅		
Enjoy Better Performance for the Social Login Component		✅		
Add a Banner to an Experience Cloud Site	✅			
Developer Productivity				
Track User Engagement with Google Analytics 4 (Generally Available)		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Simplify the URLs for Your Authenticated LWR Sites		✅		
/services Is No Longer Available as a Base URL for Site Pages		✅		
Track Events on LWR Sites in Two More Components Enabled with Light DOM	✅			
Test Custom Domains That Use Your Certificate to Serve Your Sites		✅		
Site Performance				
Display Images Faster for Guest Users on All Devices	✅			
Cache Apex Methods for Guest Users (Generally Available)			✅	
Enable Authenticated Users to Create Records More Efficiently			✅	
Help Your Users Create Cases More Efficiently for High-Volume Sites			✅	
Let Authenticated Users Attach Files to Records Submitted via Micro-Batching			✅	
Accessibility Improvements in Experience Cloud Sites	✅			
Mobile for Experience Cloud				
Create Mobile Publisher for Experience Cloud Apps for LWR Sites (Beta)		✅		
Use a Message to Urge or Require Your App Users to Update		✅		
Set Up App Navigation Settings with Ease		✅		
Additional Mobile Publisher Enhancements for Experience Cloud	✅			
Guest User Security				
Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions (Release Update)			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)			✅	
Security and Sharing				
Upgrade SAML Single Sign-On Framework (Release Update)			✅	
Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)			✅	
Use Your Certificate to Serve Your Custom Domain in Your Experience Cloud Sites		✅		
Specify Trusted Domains for Clickjack Protection on Your Site		✅		
Test Custom Domain Subdomains That Serve Your Site	✅			
Add Server Name Indication (SNI) for Requests to Custom Domains That Serve Your Experience Cloud Site		✅		
IP Addresses Are No Longer Allowed for Domain Certificates That Serve Your Experience Cloud Site			✅	
Other Changes				
Manage Cloud Cookies for a Better Experience	✅			
Updated List of Prohibited HTML Tags and Attributes for CMS Connect			✅	

Field Service

Manage assets more intelligently by planning maintenance based on usage or real-world elapsed time between maintenance visits. Smoothly track inventory movement with enhanced serialized products. Check under the hood in the Optimization Hub, with insights such as how your response times and resource utilization improved. Upgrade your scheduling capabilities by creating complex work dependencies and retrieving available appointment times more quickly. Showcase your brand's personality in customized Appointment Assistant messages to your customers. Improve your service by asking for a reason when customers cancel appointments. Envision a custom mobile app for your business, then make it happen with Lightning web components (Beta). And it's easier than ever to use the mobile app with optimized image uploads, deep links to quick actions, and a unified view of the schedule.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Resource Management				
Enhanced Scheduling and Optimization				
Explore the Impact of Optimization with Optimization Hub (Generally Available)			✅	
Stay on Top of Complex Projects with Enhanced Scheduling and Optimization			✅	
Get Available Time Slots Fast with Gradeless Appointment Booking			✅	
Gain Insights on How a Service Appointment Was Scheduled			✅	
View Travel Mode Details Easily on the Gantt Resource Map			✅	
Get Additional Supported Features with Enhanced Scheduling and Optimization			✅	
Appointment Bundling				
Start Bundling Appointments Quickly		✅		
Make Sure Your Bundle Fits in the Schedule		✅		
Bundle Appointments Over Multiple Days		✅		
Sort the Bundle According to the Side of the Street		✅		
Keep an Eye on All Your Automatic Bundling Requests			✅	
Tighten Security for Unauthenticated Guest User Scenarios			✅	
Asset Management				
Streamline Product Management with Enhanced Serialized Product Support	✅			
Add Flexibility to Work Order Generation (Generally Available)	✅			
Schedule Usage-Based Maintenance Automatically (Generally Available)	✅			
Work Smarter with Custom Logic	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✅	
Customer Engagement				
Appointment Assistant				
Find Out Why Customers Cancel Their Appointments			✅	
Personalize Your Appointment Assistant Experience		✅		
Visual Remote Assistant				
Benefit from Screen Sharing During a Remote Visual Session	✅			
Enhance Images with Text Annotation	✅			
Migrate the Visual Remote Assistant Settings		✅		
Customize Your Terms of Service		✅		
Blur the Background on Two-Way Video Calls (Beta)		✅		
Mobile				
Extend and Customize the Field Service Mobile App with Lightning Web Components (Beta)			✅	
Show Absences and Work Together in the Schedule (Generally Available)			✅	
Upload Images Faster with Optimized Image Upload		✅		
Ease App Switching and Save Time with Deep Link Global Actions			✅	
Get Better Automatic Status Updates When Using Drip Feed	✅			
Spotlight on Field Service Content				
Get More Guidance to Set Up Field Service		✅		
Watch Videos				

Hyperforce

Hyperforce is the trusted foundation of the Salesforce Customer Engagement Platform.With Hyperforce, you can scale globally while meeting local compliance regulations on a foundation of security, privacy, and agility.

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

Industries

Accelerate productivity and drive customer success with Automotive Cloud, launching as generally available this release. Gain critical insights into your company's carbon footprint with Net Zero Cloud. Build stronger relationships with partner visits and the Service Console for Manufacturing. Get started quickly with more guided setups in Financial Services Cloud. Public Sector Solutions offers composable case management to help caseworkers deliver custom services that result in successful outcomes for individuals and families.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automotive Cloud (Generally Available)				
Accelerate Growth and Steer Customer Success				
Automotive Lead Management				
Know When Your Lead Is Interested				
Capture Item-Level Information for Leads				
Record Information About Lead Providers and Preferred Dealers				
Convert Leads Into Opportunities with Line Items and Preferred Sellers				
Vehicle and Asset Management				
Capture Granular Details About Vehicles				
Manage Automotive Assets				
Get a Holistic View of a Vehicle				
Know More About a Vehicle				
Track Products and Locations				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Stakeholder Management				
Develop a Detailed Business Profile of Your Partners				
Link Each Asset to Multiple Stakeholders				
Track Cumulative Purchase Details for Dealer and Customer Groups				
Get Greater Visibility Into Your Stakeholder Information				
Customer Service Management				
Transform Your Customer Service Experience Using the Service Console for Automotive				
Orchestrate the Automotive Service Journey with Service Excellence Components				
Dealer Performance Management				
Report Sales of Vehicles and Parts				
Optimize Sales and Operations for Automotive				
Plan and Execute Effective Dealer Visits				
Accelerate Your Business by Using Analytics for Automotive				
New Metadata Types				
New and Changed Objects				
Consumer Goods Cloud				
Integrate Your Digital Operations Quickly with MuleSoft Accelerator			✅	
Improve Business by Using Analytics for Consumer Goods - Advanced Data Model			✅	
Financial Services Cloud				
Actionable Relationship Center (ARC)				
Create ARC Relationship Graphs Quickly Using Templates		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Einstein Relationship Insights for Accounts and Contacts on an ARC Graph				
Show All Child Records for an Object in an ARC Graph			✅	
Show Peer Object Fields on an ARC Graph		✅		
Interest Tags				
Browse for Interest Tags and Tag Categories	✅			
Householding				
Configure the Group Builder Edit Window			✅	
Disable Automatic Related Role Field Updates on Account Account Relationship Records			✅	
Show the Group Builder Edit Window on an ARC Graph		✅		
Verify Caller Identity for Financial Services Cloud				
Verify Your Financial Caller's Identity		✅		
Verify Both an Authorized Representative and a Customer		✅		
Extend Your Identity Verification Flows by Using Custom Flow Screen Components		✅		
Use External Data to Verify Caller Identity		✅		
Translate Custom Field Labels for Global Users		✅		
Get Caller Identity Verification Up and Running with Ease		✅		
Enhanced Timeline for Financial Services Cloud				
View Customer Information Chronologically with Enhanced Timeline		✅		
Financial Services Cloud Community Licenses				
Update Your Experience Cloud Sites Permission Set Licenses			✅	
FlexCard-Based Policy 360 Component				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Do More with the New FlexCard-Based Policy 360 Component			✅	
Wealth Management and Retail Banking				
Reduce Churn of Wealth Management Customers		✅		
Increase Your Assets Under Management from Wealth Management Customers		✅		
Maximize Your Revenue by Recommending the Right Products to Customers		✅		
Reduce Churn of Retail Banking Customers		✅		
Tear Sheet Generation				
Summarize Valuable Information from Objects in a Document	✅			
Streamline the Know Your Customer Process For Your Users		✅		
Create a Financial Services Cloud Pre-Release Trial Org		✅		
Get Started Faster with Guided Setups				
Get ARC 1.0 Up and Running with Ease		✅		
Get Branch Management Up and Running with Ease		✅		
Get Compliant Data Up and Running with Ease		✅		
Get Financial Accounts, Financial Account Roles, and Financial Account Transactions Up and Running with Ease		✅		
Get Households Up and Running with Ease		✅		
Get Interest Tags Up and Running with Ease		✅		
Get Life Events Up and Running with Ease		✅		
Get Mortgage Up and Running with Ease		✅		
Get Record Association Builder Up and Running with Ease		✅		
Get Record Rollups Up and Running with Ease		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Rollup by Lookup Rules Using Data Processing Engine Up and Running with Ease		✅		
New and Changed Financial Services Cloud Object Fields		✅		
Get Started with FSC Insurance Analytics Fast Start			✅	
Improve Business and Customer Relationship with Analytics for Retail Banking			✅	
Referral Scoring for Financial Services Cloud is Being Retired		✅		
Life Events or Business Milestones Has a New Name		✅		
Health Cloud				
Health Cloud for Life Sciences				✅
Advanced Therapy Management				
Guided Setup for Advanced Therapy Management	✅			
Access the Appointment Booking Screen with the Appointment Slot Lightning Component			✅	
Schedule Multiple Appointments Concurrently			✅	
Schedule Appointments When No Slots Are Published			✅	
Easily Cancel and Reschedule a Series of Appointments			✅	
Seamlessly Accept Requests with the New Confirm Booking Request Flow			✅	
View Total Enrollee Count in Advanced Therapy Management	✅			
Advanced Therapy Management Has an Add-On License for Added Capacity				✅
Identity Verification				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Verify the Identity of a Member When an Engagement Is Physically Initiated	✅			
Verify the Identity of a Customer When an Engagement Is Initiated Via Omni-Channel			✅	
Enable Users to Access the Verification Flow from the Record Page or the Utility Bar			✅	
Implement Tertiary Verification			✅	
Enable Users to Take Appropriate Actions for Prospective Members			✅	
Disable Auto-Creation of Engagement Attendees			✅	
Enable Users to Visually Track the Process of Engagement Interactions			✅	
Manage Sharing and Ownership of Engagement Interactions			✅	
Save Member Verification Steps Invocable Action			✅	
Enable Performance and Scalability for Provider Search			✅	
Lower Costs and Increase Healthcare Access with Virtual Care				
Enable and Set Up Virtual Care			✅	
Self-Schedule Video Calls			✅	
Use Guided Setup to Enable Video Visits			✅	
Administer Health Assessments to Collect Patient Data Efficiently			✅	
Medication Management				
Improve Patient Health Outcomes with Comprehensive Medication Reviews			✅	
Overcome Medication-Related Problems with Targeted Medication Reviews			✅	
Enhance Patient Safety by Identifying Clinical Issues during Medication Therapy Reviews			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increase Patient Engagement by Helping Patients Take an Active Role in their Health Care			✅	
Simplify Medication Therapy Reviews Using the Start Medication Therapy Review Flow			✅	
Get More Information on Each Medication			✅	
Get Up and Running Quickly by Using the Guided Setup			✅	
Review Prior Authorization Requests with Utilization Management				
Simplify and Streamline Prior Authorization Request Reviews with the Utilization Management for Payers App			✅	
Enhance Operational Efficiencies Using the Guided Process Workflows for Prior Authorization			✅	
Facilitate Effortless Submission of Prior Authorization Requests			✅	
Thoroughly Evaluate Requests By Conducting Effective Admin Reviews			✅	
Promote Optimal Health Outcomes by Performing In-Depth Nurse Reviews of a Request			✅	
Arrive at an Accurate Clinical Determination of Requests By Conducting Comprehensive Medical Director Reviews			✅	
Promote Transparency and Open Communication By Scheduling Peer-to-Peer Reviews			✅	
Get Aligned on Clinical Decisions By Conducting Prompt Peer-to-Peer Review Meetings			✅	
Expedite Reviews of Prior Authorization Requests With Business Rules and Logic			✅	
Address your Business' Unique Needs and Challenges by Customizing Prior Authorization Process Workflows and Rules			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Service-Level Agreement Compliance of Prior-Authorization Requests		✅		
Speed Up Configurations Using the Guided Setup for Utilization Management			✅	
Provide Site User Access to Utilization Management			✅	
Get Real-Time Data for Better Decision Making With Custom Reports			✅	
Unified Health Scoring Enhancements				
View History of Actions on the Enhanced Timeline Component				
Get Started with Unified Health Scoring Faster by Using the Unified Health Scoring Data Kit			✅	
Care Coordination for Slack				
Get Notifications for a Patient's Health Records			✅	
Set Up Custom Notification Types for Other Health Cloud Objects			✅	
Use Dedicated Slack Channels to Receive Critical Notifications			✅	
Refresh the Patient Card		✅		
Objects in the FHIR R4-Aligned Clinical Data Model have Updated Sharing Options			✅	
Replacing the EHR Data Model with the Clinical Data Model				
Create a Health Cloud Pre-Release Trial Org		✅		
Health Cloud Has New and Changed Objects		✅		
Salesforce Healthcare API			✅	
New Invocable Action in Health Cloud		✅		
Loyalty Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Engaging Member Experiences by Using Widgets		✅		
Member Badges				
Design Badges to Recognize Member Engagement and Milestones	✅			
Decide When Badges are Assigned to Members	✅			
Loyalty Business APIs				
Customize Your Loyalty Program Processes by Using Process Templates	✅			
Integrate Loyalty Actions by Using Business APIs	✅			
Use Name Values Instead of Salesforce Object IDs During API Execution	✅			
How to Run Loyalty Program Processes	✅			
Engage Members at Various Stages of Their Membership Journey	✅			
Member Promotion Eligibility				
Save Time and Clicks with Simple View of Member's Eligible Promotions	✅			
View a Member's Promotion Eligibility on Contact and Account Records	✅			
Promotion Setup				
Use Loyalty Parameter Resources in Condition		✅		
Define Dynamic Parameters for Loyalty Actions	✅			
Insert an Action Above or Between Actions and Conditions in a Rule		✅		
Cancel Accrual and Cancel Redemption Actions in Flow Builder	✅			
Run Program Process Action in Flow Builder	✅			
Run Sub Processes of a Loyalty Program Process Automatically		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create or Update Records Automatically	✅			
Change Member Tiers Automatically	✅			
Use Loyalty Program Process Aliases	✅			
Merge Duplicate Member Records and Multiple Memberships		✅		
Give Partners Access to Program Engagement Details	✅			
Alert Agents When Member Activities Require Action			✅	
Use Order Data Directly Instead of Using Salesforce Order Management				✅
New and Changed Objects in Loyalty Management		✅		
New Invocable Actions in Loyalty Management		✅		
New and changed Loyalty Management Metadata Types		✅		
Connect REST APIs		✅		
Manufacturing Cloud				
Manufacturing for Sales				
Create Sales Agreements with Weekly Schedules			✅	
Update Multiple Values in Advanced Account Forecasts			✅	
View Meaningful Forecasts Using Advanced Filters			✅	
Filter Advanced Account Forecasts by Period Start Date			✅	
Get Notified on the Status of Your Account Forecast Operations			✅	
Manufacturing for Service				
Deliver Excellent Customer Service with Service Console for Manufacturing			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manufacturing Service Excellence Components			✅	
Partner Visit Management				
Display Visits and Visit Task Information for Sales Managers and Field Reps			✅	
Plan Effective Visits to Your Manufacturing Partners			✅	
Perform Tasks and Capture Metrics During Visits			✅	
Pre-Release Trial Org		✅		
Guided Setup				
New and Changed Objects		✅		
New Invocable Actions in Manufacturing Cloud		✅		
New Manufacturing Cloud Metadata Types		✅		
New Manufacturing Cloud Tooling API Objects		✅		
Public Sector Solutions				
Composable Case Management				
View Key Milestones in a Constituent's Life				
See the History of a Constituent's Interactions with Caseworkers				
Define Groups of Constituents to Administer Programs and Services			✅	
Get the Complete Picture of Constituent Relationships			✅	
Easily Gather the Details of Complaints for More Efficient Intake			✅	
Connect Referrals to Caseworkers to Speed Successful Outcomes			✅	
Keep Better Track of Discussions with Constituents with Interaction Summaries			✅	
Enhanced Care Plans				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More of Your Org Configured Easily with Guided Setup			✅	
Decision Explainer for Constituents			✅	
New and Changed Objects in Public Sector Solutions			✅	
Connect REST API				
New and Changed Connect REST API Resources		✅		
Changed Connect REST API Request Bodies		✅		
Changed Connect REST API Response Bodies		✅		
Net Zero Cloud				
Enhance Reference Data Loading				
Manage Water-Related Activities				
Allocate Carbon Credits to Offset Unavoidable Emissions				
Set Object-Level Permissions for Net Zero Objects				
Calculate Emissions Based On Supplier Quantity				
Reduce Your Company's Carbon Footprint from Air Travel		✅		
Net Zero Analytics to Monitor Carbon Credits and Water Management				
Track Carbon Credit Allocation			✅	
Get Deeper Insights into Water Management			✅	
New and Changed Objects for Net Zero Cloud				
New Net Zero Cloud Metadata Types				
Industries Common Components				
AI Accelerator				
Configure a Machine Learning Model to Get Predictions			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize the Feature Extractor's Default Configuration			✅	
Save Extracted Model Features and Responses During Real-Time Scoring			✅	
Show Predictions on Lightning Pages		✅		
Get NBA Recommendations From Real-Time Predictions		✅		
AI Accelerator Has New Objects		✅		
AI Accelerator Has a New Platform Event		✅		
Connect REST APIs		✅		
AiAccelerator Namespace				
New AI Accelerator Metadata Types		✅		
AI Accelerator Has New Tooling API Objects		✅		
Action Launcher				
Changes in the RecordActionDeployment Tooling API Object		✅		
Data Processing Engine				
Delete Records as Part of the Writeback Results		✅		
Get Quicker Search Results with Data Processing Engine in Provider Search		✅		
Changed Data Processing Engine Metadata Type		✅		
Business Rules Engine				
Use Object Records in Expression Sets			✅	
Use Business Elements in Expression Sets			✅	
Explain the Results of Business Rules to Your Users		✅		
Store Decision Explanations in Message Templates		✅		
Control What Data to Upload from CSV Files to Decision Matrices	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create a Decision Matrix Version from a Selected Version	✅			
Migrate Calculation Procedures and Calculation Matrices		✅		
New Functions Supported in Expression Sets		✅		
New and Changed Objects in Business Rules Engine		✅		
New and Changed Tooling API Objects in Business Rules Engine		✅		
New Metadata Types for Business Rules Engine		✅		
Connect REST APIs		✅		
BusinessRule Namespace				
Decision Table				
Save Time While Finding the Best Outcome		✅		
Get More Outcomes From Your Decision Tables Every Hour		✅		
Changed Tooling API Objects in Data Table		✅		
Changed Decision Table Metadata Types		✅		
Discovery Framework				
Discovery Framework Metadata Types (Generally Available)		✅		
New Invocable Actions		✅		
Use the Assessments Component to Collect User Data Efficiently			✅	
Einstein Relationship Insights				
See Einstein's Relationship Recommendations on Your Home Page			✅	
View Relationship Insights With the New ARC Einstein Relationship Insights	✅			
Engagement				
Engagement Connect REST API				
New and Changed Objects				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identity Verification				
New and Changed Metadata Types				
Tooling API New and Changed Objects				
Intelligent Document Reader				
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			✅	
Refine Data Extraction by Using Record Type Field Mapping			✅	
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 and Changed Objects		✅		
Intelligent Document Reader Has New Metadata Types		✅		
Intelligent Document Reader Has New Tooling API Objects		✅		
Connect REST API		✅		
Intelligent Form Reader				
Refine Data Extraction by Using Record Type Field Mapping			✅	
Intelligent Form Reader Has New and Changed Objects		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Intelligent Form Reader Has New Metadata Types		✅		
Changed Tooling API Object in Intelligent Form Reader			✅	
Connect REST API		✅		
Sentiment Insights				
Get Qualitative Feedback on Survey Responses			✅	
Sentiment Insights Has a New Object			✅	
Industry Integration Solutions				
Accept Terms and Conditions			✅	
Connect Salesforce and MuleSoft			✅	
Discover Available Integration Assets			✅	
Enable Integration Assets			✅	
Get Started Faster with Guided Setups				
Get Action Plans Up and Running with Ease	✅			
Get Document Checklist Items Up and Running with Ease	✅			
Get Intelligent Document Automation for Disclosures and Consent Up and Running with Ease	✅			
Get Record Alerts Up and Running with Ease	✅			

Marketing Cloud Account Engagement

You can now take action on prospects in third-party applications via Engagement Studio programs. Plus, you have the option to run a full sync on your prospect database and you can now grant users access to most of the Account Engagement Lightning app with new permission set licensing.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Marketer Experience				
Automate Tasks with Extensibility Enhancements		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Simplify Prospect Opt-Out Status Between Account Engagement and Salesforce		✅		
Review Prospects with Bot-Like Activity	✅			
Form Security Features Now Mandatory			✅	
Update WordPress Plug-In After the Security Update	✅			
Quickly Locate Unused Files	✅			
Manage and Extend Account Engagement				
Give Users Access to Account Engagement with a Dedicated Permission Set License and Permission Set			✅	
Sync All Prospect Records with One Click		✅		
Pardot Classic App Is Being Retired	✅			
Account Engagement API: New and Changed Items		✅		

Mobile

The Salesforce Mobile App updates include the upcoming retirement of two tablet experiences, forecast types now grouped by territory hierarchy, and a beta to optimize viewing mobile reports. In enhanced LWR Experience Cloud sites, custom Lightning Web Components can now have different integer property values. Mobile Publisher now has a beta to support Lightning Web Runtime (LWR) Sites for Experience Cloud, ease of configuration for navigation settings, and a kiosk mode for barcode scanner.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
View More Forecast Types in the Salesforce Mobile App			✅	
Get Optimized Mobile Reports with Enhanced Reports (Beta)	✅			
Unify Your Analytics on Mobile	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Plan for Salesforce Mobile App Community License Access Retirement			✅	
Enable Lightning on Tablet Before Other Tablet Experiences are Retired			✅	
Availability of New BarcodeScanner Features for the Salesforce App	✅			
Use Different Property Values for Desktop, Tablet, and Mobile in Custom Lightning Web Components		✅		
Mobile Publisher				
Managed Public Distribution Option for Android Is Now Retired	✅			
Mobile Publisher for Experience Cloud Supports Lightning Web Runtime (LWR) Sites (Beta)		✅		
Urge or Require Users to Update to the Latest Mobile Publisher App Version		✅		
Configure Mobile Publisher Navigation Settings More Easily		✅		
Kiosk Mode for Barcode Scanner	✅			
Access the Mobile Device Calendar From Mobile Publisher Apps	✅			
Enable Marketing Cloud Push Notifications	✅			

Revenue

Use Subscription Management to sell more subscriptions, quote prices, and manage collections. Salesforce CPQ updates improve security and performance.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Subscription Management				
Sell Subscriptions to Customers and Partners in Experience Cloud			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Up and Manage Products and Pricing Together		✅		
Sell More When Your Customers Increase the Quantity of a Subscription			✅	
Quote Subscription Products, Then Invoice and Track Them			✅	
Automate Batch Invoicing				
Schedule Invoice Batch Runs to Recur Daily, Weekly, or Monthly			✅	
Define the Criteria for Invoice Batch Runs			✅	
Find Out When the Next Invoice Batch Run Is Scheduled			✅	
See the Outcome of an Invoice Batch Run			✅	
Troubleshoot and Resolve Batch Invoicing Errors			✅	
Enable Automation for Recurring Payments			✅	
Improve Your Collections Process with a Dashboard, Cadences, and Easier Invoice Scoring Setup				
Use a Dashboard to Stay on Top of Collections			✅	
Optimize Collections Outreach by Using Cadences and Related Invoices			✅	
Speed Through Setup for Einstein Late Payment Risk Scoring (Beta)			✅	
New and Changed Permissions for Subscription Management			✅	
Considerations for Using Subscription Management			✅	
Salesforce CPQ				
Improve Security by Enabling Integration User for Calculations			✅	
Experience Browser Performance Improvements for Salesforce CPQ (Release Update)			✅	
Create More Complex Nested Bundles	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add Multiple Entries for the Same Child Product	✅			

Sales

Ensure efficient sales coverage when you assign leads to territories. Empower your enablement team to accelerate business outcomes with Enablement Programs. Give Einstein Conversation Insights users a great start with a new in-app welcome experience. Integrate flows with Sales Engagement cadences. And expand sales efforts into international markets with Salesforce Maps.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Core Sales Features				
Collaborative Forecasts				
Create Custom Calculated Forecast Columns to Reflect Your Business			✅	
Choose Custom Opportunity Fields to Include or Exclude from Your Forecasts		✅		
View Territory-Based Forecast Types in the Salesforce Mobile App			✅	
Create Longer Forecast Adjustment Notes			✅	
Work Smoothly with Improved Usability of Salesforce Desktop Site Forecasts		✅		
Enterprise Territory Management				
Assign Leads to Territories (Generally Available)			✅	
Opportunities				
Add Contacts to Cadences from Opportunities			✅	
Control Push Count Field Visibility in Opportunity and Pipeline Inspection List Views			✅	
Other Changes in Core Sales Features				
Break Up Record Details in Accounts, Contacts, and Opportunities		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable New Order Save Behavior (Release Update)			✅	
Delete Connected LinkedIn Member Accounts More Easily	✅			
Enablement for Sales Teams				
Enable Your Sales Teams to Achieve Your Company's Revenue Goals (Generally Available)			✅	
Revenue Intelligence				
Create and Share Different Revenue Insights Apps to Meet Your Teams' Needs	✅			
Get Revenue Insights Analytics on Opportunity Splits and Custom Amount Forecasts	✅			
Get Revenue Insights Analytics on Single Category Rollups	✅			
Pipeline Inspection				
Keep Deals Moving with Einstein Conversation Insights and Email Insights in Pipeline Inspection			✅	
Use Number and Currency Fields to Summarize Metrics in Pipeline Inspection			✅	
Edit the Opportunity Amount Field Inline in Pipeline Inspection Views	✅			
Einstein Conversation Insights				
Give New Users a Great Start to Einstein Conversation Insights	✅			
See Insights Related to Customer Objections	✅			
See Items That Need Attention on the Action Items Tab	✅			
Get Faster Access to Processed Calls	✅			
Productivity Features				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track and Sort All Your Tasks with the To Do List			✅	
Einstein Activity Capture				
Connect Google to Salesforce with a Service Account		✅		
Track User Onboarding and License Usage		✅		
Skip User Deactivation Before Deleting Emails or Events		✅		
Expand Awareness of Executive Involved Email Insight		✅		
Manage Associations Easily in Gmail or Outlook	✅			
Hide More Sensitive Emails on the Activity Timeline	✅			
Email Experience				
Get More Options for From Addresses in List Emails	✅			
Access the Email Composer from Custom Components		✅		
Verify Your Email Address to Send Email Through Salesforce	✅			
Review Hourly Send Limits for Single Emails	✅			
Salesforce Inbox				
Inbox Mobile App	✅			
Delete Emails or Events Without Deactivating Users	✅			
Let Your Customers Pick Their Own Meeting Times in Gmail and Outlook Integrations	✅			
Sales Engagement (formerly High Velocity Sales)				
High Velocity Sales Was Renamed to Sales Engagement	✅			
Sales Cadences Were Renamed to Cadences	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Perform Actions with Flow When Reps Complete a Cadence Step			✅	
Use Screen Flows as Cadence Steps	✅			
Add Automation to Sales Engagement Easily with Included Flow Templates		✅		
Use Cadences for Collections with Related Invoices			✅	
Add Contacts to Cadences from Opportunities and Pipeline Inspection			✅	
Add Targets to Cadences More Flexibly by Starting Them at a Specific Step			✅	
Users Can Log Call Results More Easily with the Updated Log a Call Window	✅			
Salesforce Maps Portfolio				
Salesforce Maps				
Create Shape Layers Using International Postal Codes	✅			
Call Customers from the Map	✅			
Salesforce Maps Territory Planning				
Assign Units Using Criteria That You Define	✅			
Assign Account Teams to Territories (Generally Available)	✅			
Visualize and Preview Assignment Changes	✅			
Measure Transfers of Unit Ownership when Planning Territories	✅			
Manage Placeholders During Optimization for Any Use Case	✅			
Map New and Updated Boundaries		✅		
Other Enhancements in Salesforce Maps Territory Planning	✅			
Salesforce Maps Mobile				
Make Calls from the Map in the Salesforce Mobile App	✅			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Cloud Einstein				
Einstein Scoring Model Update Timing Changed		✅		
Sales Cloud for Slack (Generally Available)			✅	
Integration with Google				
Gmail Integration				
Manage Associations Easily in Gmail	✅			
Confirm Browser Version for Gmail Integration	✅			
Lightning Sync for Google				
Streamline Your Move to Einstein Activity Capture		✅		
Integration with Microsoft®				
Outlook Integration				
Manage Associations Easily in Outlook	✅			
Log Delegated Events Flawlessly with Outlook Integration	✅			
Lightning Sync for Microsoft® Exchange®				
Review Microsoft Announcements on Basic Authentication Retirement for Exchange Online	✅			
Salesforce for Outlook				
Salesforce for Outlook Is Retiring in June 2024				
Find Version-Specific Salesforce for Outlook Release Notes	✅			

Salesforce CMS

Enhanced CMS workspaces are now generally available.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Take Advantage of the Enhanced Sites and Content Platform (Generally Available)		✅		
Salesforce CMS Workspaces Limited to 2,000		✅		
Salesforce CMS Channels Limited to 300		✅		

Salesforce Flow

New capabilities in Flow 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.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Integration			✅	
OmniStudio				
OmniStudio Winter '23 Updates				
One Primary OmniStudio Permission Set License				✅
Standard OmniStudio Content Updates				
Standard OmniStudio Runtime Enhancements				✅
OmniStudio FlexCards				✅
Standard OmniScripts Features Supported and Not Supported				✅
Create a New Version of an OmniStudio for Vlocity DataRaptor				✅
OmniStudio Minor Release Updates				✅
OmniStudio for Vlocity Winter '23 Updates				
Edit Standard Content After Migration from Custom to Standard				✅
OmniStudio for Vlocity FlexCards				✅

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
OmniStudio for Vlocity Minor Release Updates				✅
OmniStudio Release Notes Archive				
Flow Builder				
Flow Builder Updates				
Cut and Paste Flow Elements		✅		
See All Incoming Go To Connections in the Toolbox		✅		
Use Formula Builder in Flow Resources and Collection Filter Elements		✅		
Use ISCLONE in Record-Triggered Flow Formulas		✅		
Use Record-Triggered Flows to Update Related Records		✅		
Use In and Not In Operators in Flows to Find Related Records		✅		
Launch Screen Flows With Lightning Web Components		✅		
Control Flow Screen Visibility Based on Dynamic Forms For Flow Picklist Values		✅		
Two-Column Flow Layouts Are Superseded by Multicolumn Screens		✅		
Generate Flow Choice Options From External Data		✅		
Filter Your Picklists By Record Type in Flow Screens	✅			
Create Record Resources With Ease		✅		
Specify Time Offsets in Months for Scheduled Paths		✅		
Get More Canvas Space with the Toolbox Hidden		✅		
Enjoy More Room When Building Flow Screens		✅		
Find Flow Elements Faster with Search		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Testing and Debugging				
Test One, Two, Three, Flow (Generally Available)		✅		
Flow Runtime				
Select Multiple Records in the Lookup Flow Screen Component		✅		
Select Multiple Records from a Table in a Flow Screen (Beta)			✅	
Flow Run-Time Changes in API Version 56.0		✅		
Flow Management				
Block New Workflow Rule Creation		✅		
Access Flows from Setup and Automation Home		✅		
Flow Extensions				
Use More Flow Screen Components with Flow in Slack (Beta)		✅		
Use Input Parameters for Screen Flows in Slack with an Invocable Action (Beta)			✅	
Flow and Process Release Updates				
Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)			✅	
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✅	
Make Paused Flow Interviews Resume in the Same Context with the Same User Access (Release Update)			✅	
Run Flows in User Context via REST API (Release Update)			✅	
Prevent Guest User from Editing or Deleting Approval Requests (Release Update)			✅	
Disable Access to Session IDs in Flows (Release Update)		✅		
Require User Access to Apex Classes Invoked by Flow (Release Update, Retired)			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Orchestration				
Assign Steps to Credentialed Experience Cloud Site Visitors		✅		
Enable Sharing for Flow Orchestration Objects (Release Update)			✅	
Create Reports with Flow Orchestration Objects	✅			
Use Subflow Elements with Evaluation Flows		✅		
Other Improvements		✅		

Security, Identity, and Privacy

Help your users do their jobs safely with a range of new options and security tools. Enhanced Domains enforcement begins. The Auto-Enable Multi-Factor Authentication (MFA) release update is available for orgs with fewer than 100 active users. Fine-tune how you manage consent preferences with Preference Manager, now generally available. Access even more event log file types with Event Monitoring, more security setting details with Security Center, and a host of other security enhancements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Domains				
Deploy Enhanced Domains (Release Update)			✅	
Review the New Timeline for Enhanced Domains	✅			
Identify Your Redirected My Domain Hostnames			✅	
Plan for a My Domain Change	✅			
Learn More About My Domain Hostnames and Redirections	✅			
Review New Guidance on Updating Authentication After a My Domain Change	✅			
Include the Server Name Indicator (SNI) Extension for Custom Domain Requests		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Serve Your Custom Domain with Your Certificate in Hyperforce	✅			
Test Custom Domains That Use Your Certificate in a Sandbox		✅		
Use Partitioned Domains in Non-Production Orgs	✅			
Test Your Custom Domain Subdomains	✅			
IP Addresses Are No Longer Allowed for Certificates			✅	
The Language for Enhanced Domains Was Updated	✅			
Other My Domain Changes		✅		
My Domain Login Page Was Changed	✅			
Identity and Access Management				
MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)		✅		
Chatter Free and Chatter External Users Are Automatically Excluded from MFA Auto-Enablement and Enforcement		✅		
Get More Guidance from the Multi-Factor Authentication Assistant			✅	
Learn to Enable Multi-Factor Authentication with Trailhead		✅		
The Back Up and Restore Feature in Salesforce Authenticator Is Limited to Salesforce Users	✅			
Get More from Automation in Salesforce Authenticator	✅			
Block Connected Apps from Using the OAuth 2.0 User-Agent Flow			✅	
Set Up Server-to-Server Integrations with the OAuth 2.0 Client Credentials Flow			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Alternate OAuth 2.0 Flows instead of the Username-Password Flow for Special Scenarios			✅	
Metadata API Responses No Longer Include Authentication Provider Consumer Secrets			✅	
Upgrade SAML Single Sign-On Framework (Release Update)			✅	
Benefit from Improved Performance for the Social Login Component		✅		
Callback URLs Using the HTTP Protocol Are Blocked		✅		
Upgrade to Identity Connect 7.1.3			✅	
Privacy Center				
Preference Manager Generally Available		✅		
Customize Preference Forms		✅		
Token Generator Relocation		✅		
Retention Policy Compliance Categorization		✅		
Custom Data Masking in Retention Policies		✅		
Salesforce Shield				
Event Monitoring				
Log Your Redirected My Domain Hostnames			✅	
Get More Reliable Initial Datasets in the Event Monitoring Analytics App (Beta)			✅	
Get Information About Your Connections with Salesforce Connect Adapters for AWS	✅			
Shield Platform Encryption				
Encrypt More Insurance Policyholder Data		✅		
Encrypt Case Referral Details		✅		
Encrypt Data Shared in Video Visits			✅	
Encrypt More Service Cloud Voice Fields			✅	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Encrypt Participant Comments in Financial Services Cloud			✅	
Encrypt Einstein Predictive Model Data in Hyperforce (Pilot)			✅	
Security Center				
More Custom Report Types		✅		
New Health Check Settings		✅		
Track SSO and MFA Logins		✅		
Tenant Detail Page		✅		
View Who Installed a Package		✅		
View Sandbox Names		✅		
Other Changes				
Learn How to Apply the Consent Data Model to Marketing Cloud Communications			✅	
Enable Content Sniffing Protection (Release Update)			✅	
Allow Redirects Only to Trusted External URLs		✅		
Enhance Experience and Performance with Cloud Cookies	✅			
Improve Integrations with Increased Extensibility and Security for Named Credentials			✅	
Secure Cross-Cloud Integrations with Private Connect Across the Globe			✅	
Private Connect Legacy Network Is Now Retired			✅	
Host Videos from Cloudforce.com and Database.com		✅		

Service

Deliver efficient, flexible service with our expanded set of Service Cloud features. Tackle customer issues as a team directly from Slack with the Service Cloud for Slack app. Enhance the Messaging for In-App and Web experience with an emoji keyboard and estimated

wait time. Quantify the value of your Einstein setup with a customizable dashboard for Article Recommendations and Reply Recommendations. Include encrypted fields when you build your Case Classification model. Learn to build, launch, and extend bots in the new Learning Map. And more!

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Swarming				
Swarm on Customer Issues in Slack (Generally Available)			✅	
Speed Up Your Time-to-Swarm with Guided Swarming Setup			✅	
Add Multiple Users to Your Swarms			✅	
Save Time with Swarm Records That Close Automatically			✅	
Swarm on a Record Multiple Times with Overridable Swarm Record Names			✅	
Add Swarm Members More Easily with Swarm Member Details			✅	
Catch Up on Service Cloud for Slack App Features			✅	
Channels				
Messaging				
Get Enhanced Messaging for Facebook Messenger (Generally Available)		✅		
Gather and Share Information Faster with Messaging Components (Generally Available)		✅		
Give Agents Wrap-Up Time After Messaging Sessions			✅	
Modernize Communication with Emojis in Messaging for In-App and Web		✅		
Promote Transparency with Estimated Wait Time in Messaging for In-App and Web		✅		
Align Your Business with GDPR, SOC, and ISO Certifications		✅		
Help Agents Navigate the Messaging for In-App and Web Conversation with New Tools		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Respond to Customers Faster with Quick Text in Messaging for In-App and Web		☑		
Send File Attachments with Messaging for In-App and Web		☑		
Search Message History with Messaging for In-App		☑		
Update Your URLs to Enhanced Domains in Messaging for Web		☑		
Help Customers Message Easier with Browser Tab Enhancements in Messaging for Web		☑		
Complete the Conversation After an Outage by Resending Failed Messaging for Web Messages		☑		
Embed Messaging for Web in More Experience Builder Templates		☑		
Get the Latest Version of Messaging for Web Automatically in Experience Builder		☑		
Other Changes in Messaging for In-App and Web		☑		
Voice				
Manage Amazon Connect Queues in Salesforce (Beta)		☑		
Set and Track After Conversation Work Time (Generally Available)		☑		
Create Cases for Inbound Calls with an Omni-Channel Flow Template		☑		
Play Back Voicemails	☑			
Set IAM Permissions Boundaries Through Salesforce	☑			
Change Availability Status During Calls	☑			
Transfer Calls More Efficiently	☑			
Save Time with Auto-Provisioning for Omni-Channel Contact Flows	☑			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Preview Calls for Outbound Campaigns with Amazon Connect		✅		
Help Agents See Call Data on More Related Records			✅	
Prevent Accidental Logouts in Omni-Channel	✅			
Make Sure Agents Don't Miss Incoming Calls with an Orange Tab	✅			
Make More Calls with Service Cloud Voice	✅			
Give Your Developers the Latest Service Cloud Voice Features		✅		
Embedded Service for Web				
Update Your URLs to Enhanced Domains in Chat	✅			
Cases				
Direct Cases to Qualified Agents with Omni-Channel Flows			✅	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			✅	
Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)	✅			
Other Improvements to Email-to-Case			✅	
Einstein for Service				
Einstein Classification				
Use Encrypted Fields to Build Your Einstein Model (Pilot)			✅	
Automate Case Triage with Einstein Case Classification for Flows (Generally Available)			✅	
Einstein Article Recommendations				
Get Value Insights with the Einstein Article Recommendations Value Dashboard			✅	
Einstein Reply Recommendations				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Value Insights with the Einstein Reply Recommendations Value Dashboard			✅	
Einstein Bots				
Learn About Bots Fast with the New Learning Map		✅		
Connect Enhanced Bots to Facebook Messenger (Generally Available)		✅		
Preview Your Bot with Text Preview (Generally Available)		✅		
Einstein Bots Analytics		✅		
Track Engaged Sessions in Usage-Based Entitlements		✅		
Customer Service Incident Management				
Share Incident Updates with Customers at Scale with Broadcast Communications			✅	
Knowledge				
Redirect Article Favorites to the Latest Versions	✅			
Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)	✅			
Inclusive Language Updates	✅			
Routing				
Route Work Faster with Estimated Wait Time for Customers			✅	
Access All Omni-Channel Setup Tasks from One Page		✅		
Manage Your Contact Center Efficiently with More Omni Supervisor Actions		✅		
Update Queue Assignments on the Fly	✅			
Improve Contact Center Operations with Efficient Shift Scheduling	✅			
Feedback Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Design Your Own Survey UI Experience	✅			
Simplify Survey Distribution by Sending Surveys From Record Pages	✅			
Translate Matrix Questions in Your Surveys			✅	
Get Qualitative Feedback on Text Responses with Sentiment Insights			✅	
Enhance Customer Experience Through Sentiment Insights	✅			
Workforce Engagement				
Give Agents Time Off Between Shifts	✅			
Schedule the Right Agents with Availability Rule Options	✅			
Plan Staffing in Familiar Time Zone Formats	✅			
Declutter Job Profiles and Job Profile Mappings	✅			
Verifiable Credentials Management (Pilot)				
Generate and Issue Verifiable Credentials and Authentic Data			✅	

Supported Browsers

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

IN THIS SECTION:

Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic. 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.

Supported Browsers for CRM Analytics

Supported browsers for CRM Analytics include those supported for Lightning Experience.

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.

- 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.

	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". Check with your browser vendor to determine the latest version available.

Tablet Browsers

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

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

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

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

Phones

For the best experience, use the Salesforce mobile app.

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic. 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.

Where: Salesforce Classic is available in all editions.

	Microsoft® Internet Explorer®	**Microsoft® Edge (non-Chromium)**	**Microsoft® Edge Chromium**	**Google Chrome™**	**Mozilla® Firefox®**	**Apple® Safari®**
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

	Microsoft® Internet Explorer®	Microsoft® Edge (non-Chromium)	**Microsoft® Edge Chromium**	**Google Chrome™**	**Mozilla® Firefox®**	**Apple® Safari®**
Limitations?	Yes	Yes	Yes	No	No	Yes

> **Note:** The browser vendor defines "latest". 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.

Salesforce Overall

Learn about new features and enhancements that affect your Salesforce experience overall.

IN THIS SECTION:

General Enhancements

Winter '23 gives you more reasons to love Lightning Experience.

Customer Lifecycle Analytics: Response Analysis

Use the Response Analysis dashboard to analyze the survey responses to the matrix questions.

Feedback Management Now In Service Cloud!

The Feedback Management release notes and documentation have moved to Service Cloud. For information about what's new in Feedback Management in Winter '23, see the Service Cloud release notes.

Salesforce Scheduler

Use recurring shifts to schedule shifts that repeat at regular intervals. Define engagement channels and appointments topics, and then add them with shifts. Salesforce Scheduler shows service resources and time slots based on the engagement channel and topic that customers select when booking an appointment. You can now also book appointments for a case.

Einstein Search

Einstein Search provides an improved search experience at no additional cost. Einstein Search for Knowledge, which is now generally available, makes it easier for service agents to locate relevant articles. Users can also interact with new Einstein Search Answers enhancements and save answers and links to their clipboards.

Salesforce Data Pipelines

Take the guesswork out of foreign keys with join recommendations. Get started faster with data templates, and use the Sentiment Analytics data template to quickly categorize selected text into sentiments.

General Enhancements

Winter '23 gives you more reasons to love Lightning Experience.

IN THIS SECTION:

[Be Ready for Multi-Factor Authentication Auto-Enablement](#)

The requirement to use multi-factor authentication (MFA) when accessing Salesforce products went into effect on February 1, 2022. All users must now use MFA when they log in to Salesforce, whether they're logging in directly or using single sign-on (SSO). To help customers satisfy this requirement, in the first half of 2023, Salesforce is automatically enabling MFA for direct logins. In the September 2023 timeframe, we're enforcing MFA by making it a permanent part of the Salesforce login process. To avoid disruptions to your users when these milestones occur, enable MFA as soon as possible.

[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.

[Secure Components by Default with Lightning Web Security in New Orgs](#)

To protect custom Lightning web components, the setting Use Lightning Web Security for Lightning web components is enabled by default in new Salesforce orgs. The new Lightning Web Security architecture is replacing Lightning Locker over several releases.

[Customize Utility Panel Resizing Animation by Using a Timing Function, Function Duration, and Function Delay](#)

To gradually change the height or width of a utility panel in a Lightning app, call the setPanelWidth or setPanelHeight API with an animation duration. Specify a timing function to customize how the animation changes over time. You can also set a function delay to configure how much time elapses before the transition animation begins. Previously, when you specified a custom dimension for a utility panel, it immediately snapped to the new size.

[Create Custom Address Fields (Generally Available)](#)

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

[Use Your Account to Update Your Shipping Address](#)

You can now use Your Account to update your shipping address when it's time to renew your contract. The tax on your Salesforce subscription is calculated based on your shipping address, so it's important to keep the address current.

[User Engagement Release Notes are Now in the Guidance and Enablement Section](#)

These release notes moved to the *Guidance and Enablement* section.

Be Ready for Multi-Factor Authentication Auto-Enablement

The requirement to use multi-factor authentication (MFA) when accessing Salesforce products went into effect on February 1, 2022. All users must now use MFA when they log in to Salesforce, whether they're logging in directly or using single sign-on (SSO). To help customers satisfy this requirement, in the first half of 2023, Salesforce is automatically enabling MFA for direct logins. In the September 2023 timeframe, we're enforcing MFA by making it a permanent part of the Salesforce login process. To avoid disruptions to your users when these milestones occur, enable MFA 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, according to the [Salesforce Trust and Compliance Documentation](#). For a subset of customers, a release update that automatically enables MFA for all direct Salesforce logins is available in Winter '23 and takes effect when the Spring '23 release rolls out. For all other customers, this release update applies in a later release. For more information, see [MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)](#). To monitor the MFA enforcement milestone schedule, see the [MFA Enforcement Roadmap](#).

How: To see if you're affected by the MFA Auto-Enablement Release Update, monitor the Release Update node in Setup.

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 Salesforce, we aren't enabling or enforcing MFA for your SSO identity provider. But you are contractually required to implement MFA for all your users who access Salesforce via SSO. To satisfy this requirement, you can use your SSO provider's MFA service.

SEE ALSO:

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

    Knowledge Article: Salesforce Multi-Factor Authentication FAQ

    Salesforce Help: Enable MFA for Direct User Logins (can be outdated or unavailable during release preview)

    External Link: Change Management for a Successful MFA Rollout

    External Link: MFA for Salesforce Customer Site

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.

Secure Components by Default with Lightning Web Security in New Orgs

To protect custom Lightning web components, the setting Use Lightning Web Security for Lightning web components is enabled by default in new Salesforce orgs. The new Lightning Web Security architecture is replacing Lightning Locker over several releases.

Where: This change applies to new Salesforce orgs that use Lightning Experience in all editions. The Lightning Web Security setting affects Lightning web components that are used in Aura-based Experience Cloud sites. It doesn't affect LWR-based Experience Cloud sites.

SEE ALSO:

    Use Lightning Web Security by Default in New Salesforce Orgs

Customize Utility Panel Resizing Animation by Using a Timing Function, Function Duration, and Function Delay

To gradually change the height or width of a utility panel in a Lightning app, call the setPanelWidth or setPanelHeight API with an animation duration. Specify a timing function to customize how the animation changes over time. You can also set a function delay to configure how much time elapses before the transition animation begins. Previously, when you specified a custom dimension for a utility panel, it immediately snapped to the new size.

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

How: The `timingFunction` parameter accepts the same string values as the CSS property animation-timing-function. Use positive integer values for time in milliseconds to configure the parameters `durationMS` and `delayMS`.

The default value for `timingFunction` is *ease*, and the default value in milliseconds for the function duration and delay is *0*. To see a smooth animation when you resize a utility panel, set `durationMS` to an integer value greater than 0.

SEE ALSO:

Salesforce Component Reference: Utility Bar API

External Link: animation-timing-function

Create Custom Address Fields (Generally Available)

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.

SEE ALSO:

Deliver to Your Customers with Custom Address Fields (Generally Available)
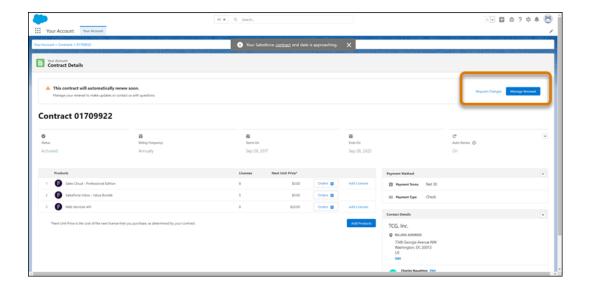
Use Your Account to Update Your Shipping Address

You can now use Your Account to update your shipping address when it's time to renew your contract. The tax on your Salesforce subscription is calculated based on your shipping address, so it's important to keep the address current.

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

Who: To use the Your Account app to change your shipping address, the Manage Billing or the Your Account App Admin User permission set is required.

How: Launch the Your Account App and select a contract from your contract list to view the details and manage your renewal. Select Request Changes and follow the prompts to update your shipping address.

SEE ALSO:
  Salesforce Help: Manage Renewals (can be outdated or unavailable during release preview)
  Salesforce Help: Manage Your Contacts with the Your Account App (can be outdated or unavailable during release preview)

User Engagement Release Notes are Now in the Guidance and Enablement Section

These release notes moved to the *Guidance and Enablement* section.

Where: User engagement features are available in Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

SEE ALSO:
  Guidance Center and In-App Guidance

Customer Lifecycle Analytics: Response Analysis

Use the Response Analysis dashboard to analyze the survey responses to the matrix questions.

IN THIS SECTION:

Analyze Customer Feedback to Matrix Questions
Use the updated Response Analysis dashboard in the Customer Lifecycle Analytics app to get insights into the response distribution details of the matrix questions. Analyze the response trends and demography-based response breakdown to know more about the customer feedback.

Analyze Customer Feedback to Matrix Questions

Use the updated Response Analysis dashboard in the Customer Lifecycle Analytics app to get insights into the response distribution details of the matrix questions. Analyze the response trends and demography-based response breakdown to know more about the customer feedback.

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

Who: To create an app from the Customer Lifecycle Analytics template, you 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.

Feedback Management Now In Service Cloud!

The Feedback Management release notes and documentation have moved to Service Cloud. For information about what's new in Feedback Management in Winter '23, see the Service Cloud release notes.

Why: Feedback Management is now a Service Cloud offering. So we've aligned the release notes and documentation as well.

SEE ALSO:

Release Notes: Feedback Management Winter '23 Release Notes (can be outdated or unavailable during release preview)

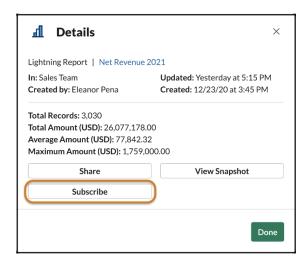*Salesforce Help:* Feedback Management (can be outdated or unavailable during release preview)

Salesforce Scheduler

Use recurring shifts to schedule shifts that repeat at regular intervals. Define engagement channels and appointments topics, and then add them with shifts. Salesforce Scheduler shows service resources and time slots based on the engagement channel and topic that customers select when booking an appointment. You can now also book appointments for a case.

IN THIS SECTION:

Schedule Recurring Shifts

Territory managers and service resources can now create shifts in recurring patterns, such as daily, weekly, or monthly. The recurrence period must be less than or equal to 120 days from the date that the recurrence period begins.

Connect with Customers from Anywhere

Provide service resources the flexibility to take appointments from anywhere by creating shifts with different engagement channels. An admin can create engagement channels, such as in-person, video, and phone, that service resources can add to their shifts and work types. Territory managers and service resources can define the availability of resources for these engagement channels by adding one or more engagement channels to a shift. Salesforce Scheduler shows service resources and available time slots based on the engagement channel that a user selects while creating an appointment.

Let Service Resources Add Multiple Topics to a Shift

Territory managers and service resources can define the availability of resources for multiple topics by adding one or more topics to a shift. Use Work Type Group to define topics. If the Salesforce Scheduler for Health Cloud option is enabled, then define topics by using Work Type. Salesforce Scheduler shows service resources and available time slots based on the topic that a user selects when creating an appointment.

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

Create a Salesforce Scheduler Pre-Release Trial Org
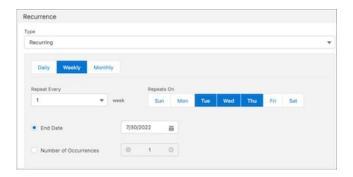
Sign up for a Salesforce Scheduler pre-release trial org to get hands-on experience and take a sneak peek at the features in this release.

Schedule Recurring Shifts

Territory managers and service resources can now create shifts in recurring patterns, such as daily, weekly, or monthly. The recurrence period must be less than or equal to 120 days from the date that the recurrence period begins.

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

How: When you create a shift, select **Recurring** in the Type field. The Recurrence section shows the options to create a recurrence pattern.

Connect with Customers from Anywhere

Provide service resources the flexibility to take appointments from anywhere by creating shifts with different engagement channels. An admin can create engagement channels, such as in-person, video, and phone, that service resources can add to their shifts and work types. Territory managers and service resources can define the availability of resources for these engagement channels by adding one or more engagement channels to a shift. Salesforce Scheduler shows service resources and available time slots based on the engagement channel that a user selects while creating an appointment.

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

How: On the Salesforce Scheduler Settings page, under the Schedule Appointments Using Engagement Channels section, complete the prerequisites provided in the link (1). Then enable Schedule Appointments Using Engagement Channels.

This feature is available only with Salesforce Scheduler APIs and by using Apex. This feature isn't supported by Salesforce Scheduler standard flows.

Let Service Resources Add Multiple Topics to a Shift

Territory managers and service resources can define the availability of resources for multiple topics by adding one or more topics to a shift. Use Work Type Group to define topics. If the Salesforce Scheduler for Health Cloud option is enabled, then define topics by using Work Type. Salesforce Scheduler shows service resources and available time slots based on the topic that a user selects when creating an appointment.

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

How: On the Salesforce Scheduler Settings page, under the Multiple Topics for Shifts section, complete the prerequisites provided in the link (1). Then enable Multiple Topics for Shifts.

Other Changes to Salesforce Scheduler

Learn about other small but important improvements to Salesforce Scheduler.

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

Book a Service Appointment for a Case

Schedule outbound and inbound appointments (except unauthenticated user bookings) by selecting Case as the parent record.

Provide a Date Range for an Appointment Booking

The Select Service Appointment Time flow screen component now has two new attributes: Resource Availability Start Date and Resource Availability End Date. Using these attributes, an admin can specify a date range for appointment booking. The date range can be anytime in the future, such as a week, a month, or six months from the current date. Users can view only the time slots in the date range provided. When users reach the time slot screen, they see the week starting from the date specified in the Resource Availability Start Date attribute. This feature is available only for anonymous scheduling.

Create a Salesforce Scheduler Pre-Release Trial Org

Sign up for a Salesforce Scheduler pre-release trial org to get hands-on experience and take a sneak peek at the features in this release.

Who: This pre-release trial org is great for admins, architects, and developers. You don't need any special permissions to sign up for an org.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/signup/scheduler-prerelease-trial/. After your org is created, you'll receive an email with login details.

> 📝 Note:
> - Winter '23 pre-release trial orgs are available now until October 15, 2022.
> - Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

Einstein Search

Einstein Search provides an improved search experience at no additional cost. Einstein Search for Knowledge, which is now generally available, makes it easier for service agents to locate relevant articles. Users can also interact with new Einstein Search Answers enhancements and save answers and links to their clipboards.

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IN THIS SECTION:

Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)

Now your service agents can find relevant articles faster and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge is now generally available.

Resolve Cases Quickly with Interactive Einstein Search Answers (Pilot)

Your agents can take immediate action by using Einstein Search Answers to extract the most relevant information from a knowledge article. The returned answers are just three lines so that agents can copy the answer and its internal link to their clipboard and then share it without leaving the page. Previously, agents opened the record page and then copied the URL and section of an article.

SEE ALSO:

Einstein Release Notes

Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)

Now your service agents can find relevant articles faster and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge is now generally available.

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

How: From Setup, in the Quick Find box, enter `Einstein Search`, and then select **Settings**. Turn on **Einstein Search for Knowledge enhancements (requires Actionable Instant Results)**, and save your changes.

SEE ALSO:

Salesforce Help: Find Articles Faster with Einstein Search for Knowledge (can be outdated or unavailable during release preview)

Salesforce Help: Enable Einstein Search for Knowledge (can be outdated or unavailable during release preview)

Resolve Cases Quickly with Interactive Einstein Search Answers (Pilot)
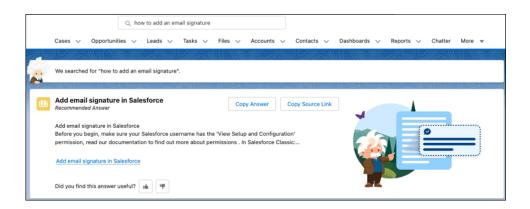
Your agents can take immediate action by using Einstein Search Answers to extract the most relevant information from a knowledge article. The returned answers are just three lines so that agents can copy the answer and its internal link to their clipboard and then share it without leaving the page. Previously, agents opened the record page and then copied the URL and section of an article.

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 and Einstein Search for Knowledge enabled.

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

How: In search, enter a question such as How to add an email signature?, or a phrase such as login issue with Salesforce iOS. Then copy the answer or source link and share it.

SEE ALSO:

Salesforce Help: Enable Einstein Search for Knowledge (can be outdated or unavailable during release preview)

Salesforce Data Pipelines

Take the guesswork out of foreign keys with join recommendations. Get started faster with data templates, and use the Sentiment Analytics data template to quickly categorize selected text into sentiments.

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.

Find Formula Date and Time Functions Faster

Find your formula date and time functions faster in a recipe. To learn more, see Find Formula Date and Time Functions Faster on page 95.

Data Prep Join Recommendations

Take the guesswork out of foreign keys with join recommendations. To learn more, see Take the Guesswork out of Foreign Keys with Join Recommendations on page 95.

Data Prep Copy and Paste

Reproduce nodes efficiently with copy and paste. To learn more, see Reproduce Nodes with Copy and Paste on page 97.

Data Prep Add Input Data

Select all Salesforce data in the improved input data interface. To learn more, see Select Input Data Easily with Improved Data Category Names on page 99.

Deploy Data Templates (Generally Available)

Get started faster with data templates. To learn more, see Get Started Faster with Data Templates (Generally Available) on page 102.

Categorize Selected Text into Sentiments (Generally Available)

Use the Sentiment Analytics data template to quickly categorize selected text into sentiments. To learn more, see Categorize Selected Text into Sentiments (Generally Available) on page 103.

Analytics

Browse and subscribe to Lightning reports and dashboards in Slack, and demystify report creation with custom report type details. Speed up data preparation with data templates, save time with ready-to-deploy Customer Insights Service and Case dashboards, and embed multiclass predictions in a dataset during data prep.

IN THIS SECTION:

Reports and Dashboards

Take your reports and dashboards into Slack, with sharing, collaboration, and subscriptions right in the app. Demystify report creation with custom report type structural details before you start. Manage your experience better with contextual search and filters in Analytics Home.

CRM Analytics

Prepare data more quickly and easily with data templates. Assess outcome and impact in real time directly on dashboards with the Input widget. Reduce go-live time with Customer Insights Service and Case dashboards. Embed multiclass predictions in a dataset during data prep, add Snowflake data directly to your model-building process.

Reports and Dashboards

Take your reports and dashboards into Slack, with sharing, collaboration, and subscriptions right in the app. Demystify report creation with custom report type structural details before you start. Manage your experience better with contextual search and filters in Analytics Home.

IN THIS SECTION:

Collaborate Around Data with Lightning Reports and Dashboards in Slack

Slack isn't just for CRM Analytics anymore. Now all Salesforce users can browse, search, view, share, and subscribe to Lightning reports and dashboards using the CRM Analytics for Slack app. Teams can easily share reports and dashboards through scheduled subscriptions or posting to the team anytime. You can also run Einstein Discovery on Lightning reports and share the predictions and recommendations.

Subscribe to Lightning Reports and Dashboards Directly in Slack

Get reports and dashboards that you want to see regularly by subscribing for yourself and others in the CRM Analytics for Slack app. No need to go out to Salesforce to set up and import a subscription. You can subscribe to up to seven reports or dashboards in Slack. A subscription refreshes the report or dashboard on a schedule that you set and posts a snapshot of the item to you and your specified recipients in Slack.

Review a Custom Report Type's Structure During Report Creation

Not sure what custom report type to use when you create a report? You can now view the structure of available custom report types and choose the best one for your needs. The details panel shows the relationships between the joined objects, and tooltips explain the outcome of the joins.

Find Your Reports and Dashboards Faster in Analytics Home

Use new filtering and browsing capabilities to find and manage your Lightning reports and dashboards. Users now get an upgraded browsing experience with a series of filters to narrow search results and make it easier to manage analytics.

Access Optimal Views on Mobile with Enhanced Reports (Beta)

Enhanced Reports optimizes your reports for consumption on mobile devices without reconfiguring the report formats. In this improved mobile experience you get a responsive user interface, faster load times, and more consistent performance.

Filter Custom Report Types by Salesforce Fields (Beta)

Streamline report creation by finding custom report types that include specific standard or custom Salesforce fields. You can filter report types by up to 20 fields to ensure that the report contains the fields you need. For example, find the right report type to show which accounts bought which products by filtering on Account Name, Opportunity Name, and Product Model Number.

Collaborate Around Data with Lightning Reports and Dashboards in Slack

Slack isn't just for CRM Analytics anymore. Now all Salesforce users can browse, search, view, share, and subscribe to Lightning reports and dashboards using the CRM Analytics for Slack app. Teams can easily share reports and dashboards through scheduled subscriptions or posting to the team anytime. You can also run Einstein Discovery on Lightning reports and share the predictions and recommendations.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Available in CRM Analytics for Slack where approved by a workspace admin and installed in Slack.

Who: Users must have the Connect Salesforce with Slack permission. For subscriptions, users must have the Subscribe to Dashboards, Subscribe to Dashboards: Add Recipients, Subscribe to Reports, and Subscribe to Reports: Add Recipients permissions. For running predictions, users must have the View Einstein Discovery Recommendations permission.

How: Lightning reports and dashboards appear in recents, favorites, and searches within the CRM Analytics for Slack app. Open the menu on a report or dashboard to view and share the item.

SEE ALSO:

Salesforce Help: CRM Analytics for Slack (can be outdated or unavailable during release preview)

Salesforce Help: Subscribe to Lightning Reports and Dashboards Directly in Slack (can be outdated or unavailable during release preview)

Salesforce Help: Import and Add Recipients to Lightning Report and Dashboard Subscriptions (can be outdated or unavailable during release preview)

Salesforce Help: Run Einstein Discovery Predictions (can be outdated or unavailable during release preview)

Subscribe to Lightning Reports and Dashboards Directly in Slack

Get reports and dashboards that you want to see regularly by subscribing for yourself and others in the CRM Analytics for Slack app. No need to go out to Salesforce to set up and import a subscription. You can subscribe to up to seven reports or dashboards in Slack. A subscription refreshes the report or dashboard on a schedule that you set and posts a snapshot of the item to you and your specified recipients in Slack.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Available in CRM Analytics for Slack where approved by a workspace admin and installed in Slack.

Who: Users must have the Connect Salesforce with Slack, Subscribe to Dashboards, Subscribe to Dashboards: Add Recipients, Subscribe to Reports, and Subscribe to Reports: Add Recipients permissions.

How: In the Details window of a Lightning report or dashboard in the CRM Analytics for Slack app, click **Subscribe**.

SEE ALSO:
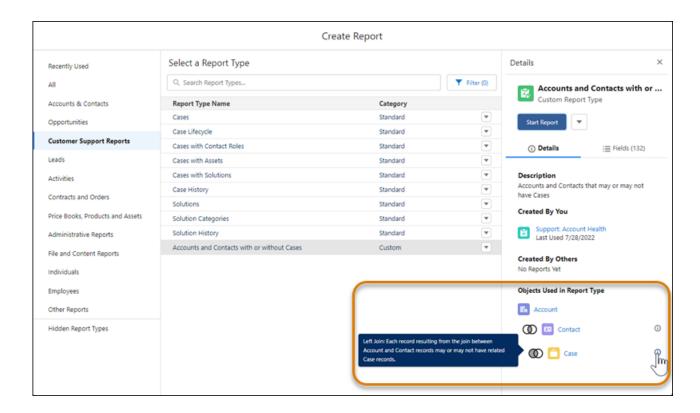
 Salesforce Help: CRM Analytics for Slack (can be outdated or unavailable during release preview)

Review a Custom Report Type's Structure During Report Creation

Not sure what custom report type to use when you create a report? You can now view the structure of available custom report types and choose the best one for your needs. The details panel shows the relationships between the joined objects, and tooltips explain the outcome of the joins.

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

How: Create a report and select a custom report type. View the object and join details.

Find Your Reports and Dashboards Faster in Analytics Home

Use new filtering and browsing capabilities to find and manage your Lightning reports and dashboards. Users now get an upgraded browsing experience with a series of filters to narrow search results and make it easier to manage analytics.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
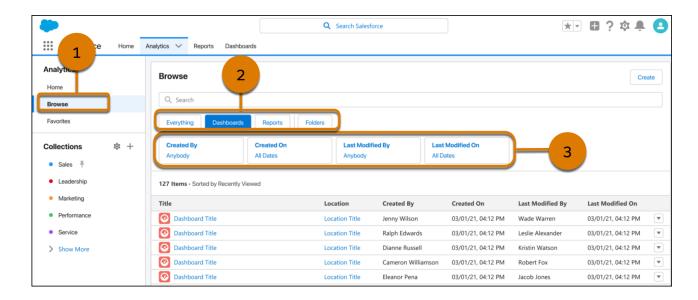
How: From Setup, in the Quick Find box, enter `reports`, and then select **Reports and Dashboards Settings**. Select **Enable the Unified Experience for Analytics Home**. From the App Launcher, select **Analytics**.

> 📝 Note: The Browse enhancement is an update to the Unified Experience for Analytics Home feature, which is a Beta Service. The Unified Experience can also be enabled in Analytics settings. Be aware Unified Experience is also disabled when it's turned off in Analytics settings.

On the Analytics Home page, click the **Browse** tab (1). Primary filters (2) set the current context and determine which filters and columns are available to the user. Use the secondary filters (3) to narrow your search by date.

SEE ALSO:

Salesforce Help: Get Familiar With the Analytics Tab (can be outdated or unavailable during release preview)

Access Optimal Views on Mobile with Enhanced Reports (Beta)

Enhanced Reports optimizes your reports for consumption on mobile devices without reconfiguring the report formats. In this improved mobile experience you get a responsive user interface, faster load times, and more consistent performance.

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

When: Enhanced Reports are available the week of October 17, 2022, for iOS and Android mobile devices.

SEE ALSO:

Salesforce Help: View Optimized Lightning Reports with Enhanced Reports (Beta) (can be outdated or unavailable during release preview)

Filter Custom Report Types by Salesforce Fields (Beta)
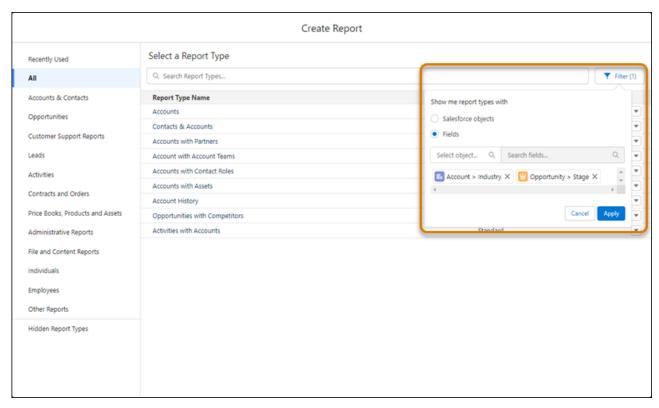
Streamline report creation by finding custom report types that include specific standard or custom Salesforce fields. You can filter report types by up to 20 fields to ensure that the report contains the fields you need. For example, find the right report type to show which accounts bought which products by filtering on Account Name, Opportunity Name, and Product Model Number.

Where: This change applies to Lightning Experience in Unlimited edition.

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: To enable this feature, contact Salesforce Support.

To see this in action, create a report. In the Create Report window, click **Filter**. Search for one or more standard or custom Salesforce fields. Fields included via lookup or part of composite fields (such as geolocation or address) aren't available as filter options.

Apply the changes, and the list updates to show the report types that include the selected fields.

CRM Analytics

Prepare data more quickly and easily with data templates. Assess outcome and impact in real time directly on dashboards with the Input widget. Reduce go-live time with Customer Insights Service and Case dashboards. Embed multiclass predictions in a dataset during data prep, add Snowflake data directly to your model-building process.

IN THIS SECTION:

Analytics Data Integration

Build recipes easily and intuitively with improvements to Data Prep's input data category names, recommended foreign keys for join operations, and copy and paste functionality. Use data templates to deploy prepackaged Data Prep processes in a few clicks.

Analytics Prebuilt Apps

Try the updated Customer Insights Case embedded dashboard, which makes it easy to get details about your caseload whenever you need it. In addition, it's a snap to customize security and custom amounts from the updated Customer Insights configuration wizard. View your Sales and Service Performance dashboards from anywhere using the new mobile layouts. Lastly, get a comprehensive view of your Wealth Analytics book of business, Leads pipeline and Opportunity pipeline in the new FSC Wealth Component Library.

Analytics App Building

Assess risk and make recommendations for your business in real time with the Input widget. Unify your analytics by incorporating Lightning reports in your CRM Analytics dashboards for a consistent experience. Explore calculated insights, data lake objects, and data models with a single click using CRM Analytics Direct Data for Customer Data Platform.

Einstein Discovery

Deploy models to make predictions with Snowflake data. Identify the most important variables in your model. Get fine-grain model performance of values within variables. See estimated story run time.

CRM Analytics for Everyone

Experience advanced browsing with filters that manage all CRM Analytics assets and Lightning reports and dashboards in one seamless user interface. Explore Ask Data for Salesforce recommended insights directly on the Search page. Collaborate more effectively using CRM Analytics for Slack by keeping up with new developments in Salesforce for Slack Integrations.

Analytics Data Integration

Build recipes easily and intuitively with improvements to Data Prep's input data category names, recommended foreign keys for join operations, and copy and paste functionality. Use data templates to deploy prepackaged Data Prep processes in a few clicks.

IN THIS SECTION:

Find Formula Date and Time Functions Faster

Transform your data with improved organization of your recipe formula date and time functions. When Custom Time Zone Support is enabled, date functions and date-time functions are separated. When Custom Time Zone Support is disabled, the functions are grouped together.

Take the Guesswork out of Foreign Keys with Join Recommendations

See which columns match each data source on the same screen where you choose your input data, and create a join and select your input in one step. Previously, when joining data sources in Data Prep, you needed to know their columns in advance to select the appropriate join key. This feature applies to Salesforce objects only.

Reproduce Nodes with Copy and Paste

Save time replicating node configurations with the Data Prep new copy, cut, and paste functionality in recipes. You can copy and paste within a single recipe or across multiple ones. Previously, if you wanted to reuse a formula or join key definitions, you needed to create a node and manually enter the information.

Update Recipe Versions Immediately in Data Prep

We're simplified editing and deleting recipe version information. When you modify a version description or delete a version, Data Prep persists the change when you click save on the edit modal. You no longer need to click save on the main recipe screen to keep your changes if you want to switch between versions.

Select Input Data Easily with Improved Data Category Names

View your Salesforce data in the Add Input Data dropdown without needing to know whether it's contained in direct data or connected objects. The former connected objects category is now split into Salesforce Objects and External Objects. Salesforce Objects includes direct data and Salesforce connected objects.

Self-Join Nodes in Data Prep

Self-join nodes in recipes when an object has a foreign key relationship to itself.

Convert Dataflows to Recipes (Generally Available)

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 option, you can create recipes from dataflows. Your original dataflows are untouched when new recipes are generated. This feature is now generally available.

Use Multiclass Models in Discovery Predict

The Discovery Predict node in Data Prep recipes now supports your multiclass classification models.

Use Event-based Scheduling with External Connections (Beta)

Event-based scheduling for recipes that use external connections or a combination of local and external connections is now available. Previously, this feature was available to local connections.

Get Started Faster with Data Templates (Generally Available)

A data template is a prepackaged data manipulation process ready to be deployed in a matter of clicks. A data template includes 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. A wizard walks you through customizing your data use case.

Categorize Selected Text into Sentiments (Generally Available)
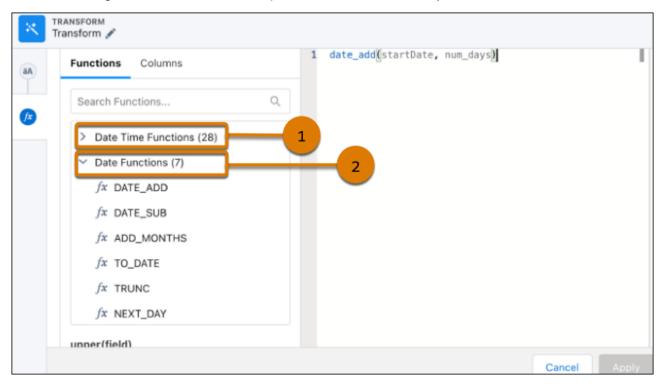
Use the Sentiment Analysis data template to quickly categorize selected text into sentiments. The template creates a recipe to perform data analysis on your specified source object, writing the results to a dataset. For example, determine if support case comments are positive, negative, or neutral using the Sentiment Analysis template on the CaseComment object.

Find Formula Date and Time Functions Faster

Transform your data with improved organization of your recipe formula date and time functions. When Custom Time Zone Support is enabled, date functions and date-time functions are separated. When Custom Time Zone Support is disabled, the functions are grouped together.

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: When working with date and time data in a recipe, select date-time (1) or date only (2) functions.
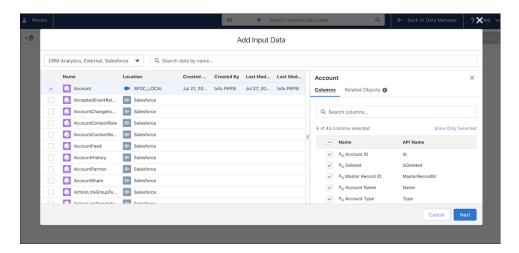
Take the Guesswork out of Foreign Keys with Join Recommendations
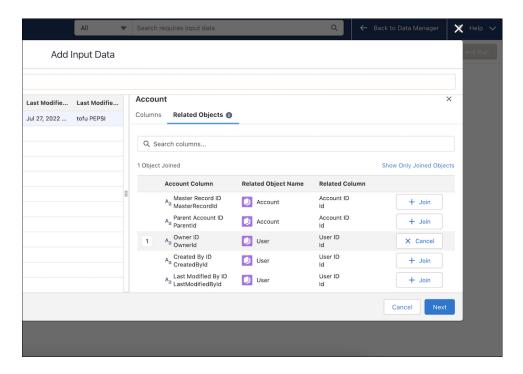
See which columns match each data source on the same screen where you choose your input data, and create a join and select your input in one step. Previously, when joining data sources in Data Prep, you needed to know their columns in advance to select the appropriate join key. This feature applies to Salesforce objects only.

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 Ente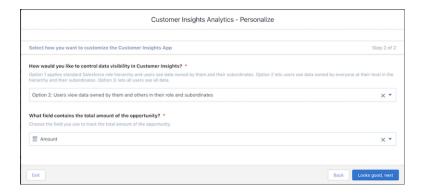rprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.
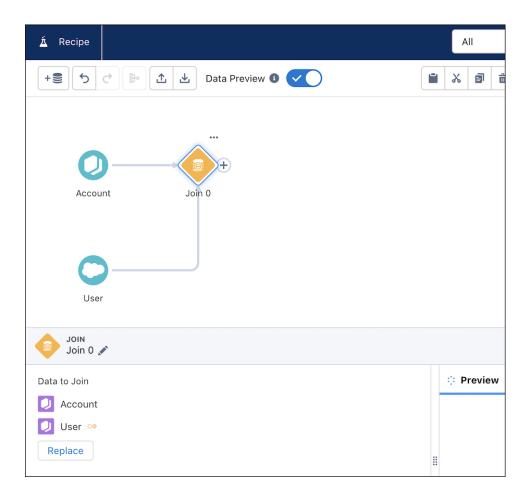
How: From the Add Input Data screen of a Data Prep recipe, select an object. This object is the left side of the join operation.

In the right pane, the Related Objects tab lists the columns that have other objects related by a matching column. The selected related object is the right side of the join operation. When you select one, a number appears in the left column to indicate the order in which it was joined.

When you click **Next**, the recipe displays the joined objects.

Reproduce Nodes with Copy and Paste

Save time replicating node configurations with the Data Prep new copy, cut, and paste functionality in recipes. You can copy and paste within a single recipe or across multiple ones. Previously, if you wanted to reuse a formula or join key definitions, you needed to create a node and manually enter the information.

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How: In a Data Prep recipe, select one or more nodes to copy or cut. From the toolbar , click [icon] to copy, [icon] to cut, or [icon] to duplicate.
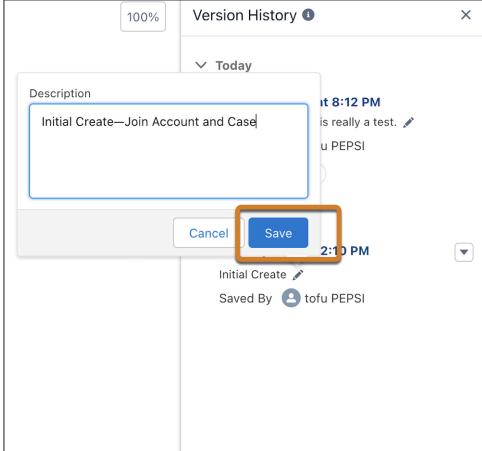
Update Recipe Versions Immediately in Data Prep

We're simplified editing and deleting recipe version information. When you modify a version description or delete a version, Data Prep persists the change when you click save on the edit modal. You no longer need to click save on the main recipe screen to keep your changes if you want to switch between versions.

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How: Under Version History in Data Prep, select the pencil icon to make a change to a version description. Click save on the edit modal

to save the new description.
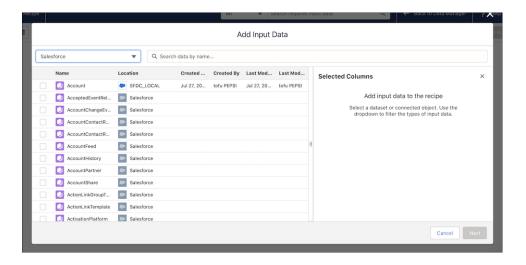
Select Input Data Easily with Improved Data Category Names

View your Salesforce data in the Add Input Data dropdown without needing to know whether it's contained in direct data or connected objects. The former connected objects category is now split into Salesforce Objects and External Objects. Salesforce Objects includes direct data and Salesforce connected objects.

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How: From the Add Input Data dropdown, select from CRM Analytics Datasets, External Connected Objects, and Salesforce Objects.

You can identify connected objects and direct datasets by their respective location icons. Here, the first option is a connected object. The others are direct data.
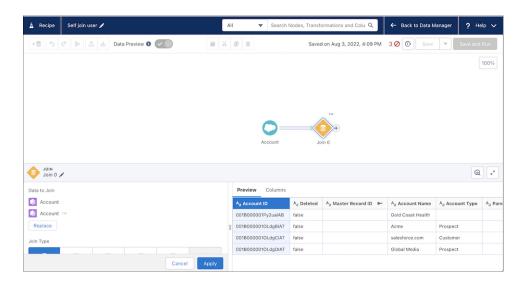
Self-Join Nodes in Data Prep

Self-join nodes in recipes when an object has a foreign key relationship to itself.

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, connect a node to itself and click **Join**.

Convert Dataflows to Recipes (Generally Available)

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 option, you can create recipes from dataflows. Your original dataflows are untouched when new recipes are generated. This feature is now generally available.

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

Use Multiclass Models in Discovery Predict

The Discovery Predict node in Data Prep recipes now supports your multiclass classification 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. 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.

To learn more, see Embed Multiclass Predictions in Your Dataset During Data Prep on page 129.
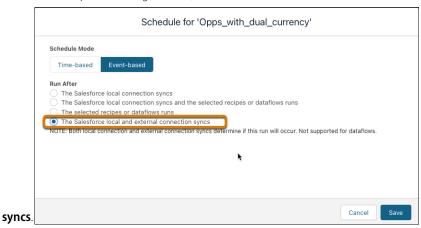
Use Event-based Scheduling with External Connections (Beta)

Event-based scheduling for recipes that use external connections or a combination of local and external connections is now available. Previously, this feature was available to local connections.

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.

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: In the recipe scheduling window, select **The Salesforce local and external connection**
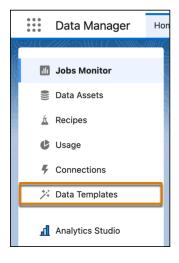
syncs.

Get Started Faster with Data Templates (Generally Available)

A data template is a prepackaged data manipulation process ready to be deployed in a matter of clicks. A data template includes 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. A wizard walks you through customizing your data use case.

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 Data Manager, select the **Data Templates** tab, which opens the template gallery for data templates.

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**.

SEE ALSO:

Salesforce Help: Get Started Faster With Data Templates (can be outdated or unavailable during release preview)

Categorize Selected Text into Sentiments (Generally Available)

Use the Sentiment Analysis data template to quickly categorize selected text into sentiments. The template creates a recipe to perform data analysis on your specified source object, writing the results to a dataset. For example, determine if support case comments are positive, negative, or neutral using the Sentiment Analysis template on the CaseComment object.

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. This change also applies to CRM Analytics in Lightning Experience and Salesforce Cla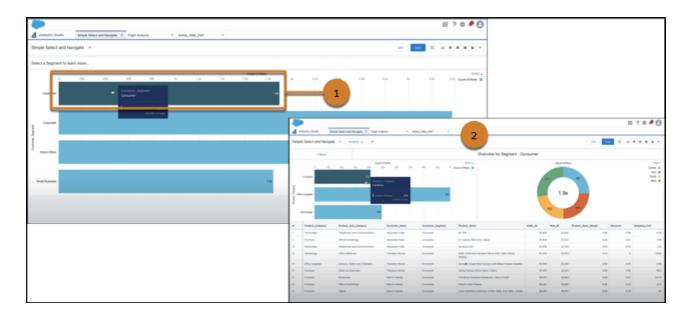ssic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In Data Manager, on the Data Templates tab, select **Sentiment Analysis**. Follow the instructions in the wizard to create your sentiment analytics recipe and dataset.

SEE ALSO:

Salesforce Help: Sentiment Analysis Template (can be outdated or unavailable during release preview)

Analytics Prebuilt Apps

Try the updated Customer Insights Case embedded dashboard, which makes it easy to get details about your caseload whenever you need it. In addition, it's a snap to customize security and custom amounts from the updated Customer Insights configuration wizard. View your Sales and Service Performance dashboards from anywhere using the new mobile layouts. Lastly, get a comprehensive view of your Wealth Analytics book of business, Leads pipeline and Opportunity pipeline in the new FSC Wealth Component Library.

IN THIS SECTION:

Get Started Fast with the Service Performance Dashboard

Jump into your service metrics with a ready-to-deploy Service dashboard that includes the most commonly requested service metrics. You can track cases, escalations, backlog, volume, and agents. The dashboard uses minimal SAQL and interactions (bindings) to make it easy to customize. In addition, the dashboard incorporates design and usability best practices.

Dive into Your Metrics with the Case Embedded Dashboard

Understand your Support health metrics with a ready-to-deploy Case dashboard that includes escalated cases, closed cases, customer tenure, customer sentiment, average case duration, and distribution of case escalations.

View Analytics from Anywhere with Mobile Sales and Service Performance Dashboards

Get your sales and service performance stats on the go from your mobile device. The dashboards are optimized for mobile devices, using a compact layout and features such as quick loading and resized charts with text wrapping. Your most important stats are prioritized so you can see them first.

Customize Row Level Security Settings and Choose a Custom Opportunity Amount from the Configuration Wizard

You can now control the row level security for your data with the configuration wizard. Choose from three security levels: allow users to see all data, their own data, or the data of users with the same role and their subordinates. Previously, security predicates were applied automatically based on your existing settings. You can also select a custom opportunity amount.

Build Rich Custom Dashboards with the FSC Wealth Component Library

The FSC Wealth Component Library provides recipes and components to build a comprehensive view of your wealth management business for financial advisors, personal bankers, and managers. The components use minimal SAQL and interactions (bindings) to make it easy to customize. In addition, the charts incorporate design and usability best practices.

Analyze Order Management Trends by Using Order Tracking Analytics

Analyze your orders and tasks based on key performance indicators and view the trend across periods by using the new Order Analysis dashboard.

Improve Business by Using Analytics for Consumer Goods - Advanced Data Model

Get insights on territory, account, and sales rep performance with the new Analytics for Consumer Goods - Advanced Data Model app. Sales managers can use the app to improve account compliance, identify accounts at risk, and maximize sales rep effectiveness. Sales reps get account-level insights on visit performance, sales, compliance, and top-selling products.

Get Started Fast with the Service Performance Dashboard

Jump into your service metrics with a ready-to-deploy Service dashboard that includes the most commonly requested service metrics. You can track cases, escalations, backlog, volume, and agents. The dashboard uses minimal SAQL and interactions (bindings) to make it easy to customize. In addition, the dashboard incorporates design and usability best practices.

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: The template is available for CRM Growth and CRM Plus users.

How: In Analytics Studio, click **Create**, and select **App**. Select **Customer Insights**, and then follow the instructions in the wizard to create your app.

Dive into Your Metrics with the Case Embedded Dashboard

Understand your Support health metrics with a ready-to-deploy Case dashboard that includes escalated cases, closed cases, customer tenure, customer sentiment, average case duration, and distribution of case escalations.

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: The template is available for CRM Growth and CRM Plus users.

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. The Case dashboard is designed to embed in the Service Console page layout using Lightning App Builder.

View Analytics from Anywhere with Mobile Sales and Service Performance Dashboards

Get your sales and service performance stats on the go from your mobile device. The dashboards are optimized for mobile devices, using a compact layout and features such as quick loading and resized charts with text wrapping. Your most important stats are prioritized so you can see them first.
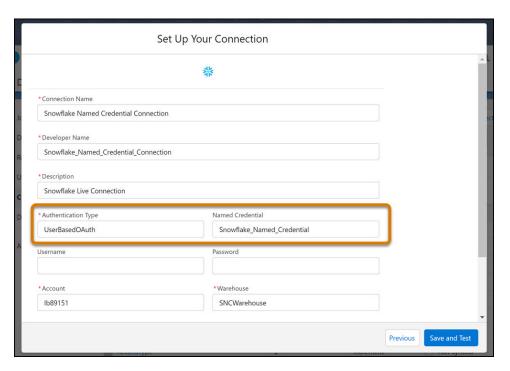
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: The template is available for CRM Growth and CRM Plus users.

Customize Row Level Security Settings and Choose a Custom Opportunity Amount from the Configuration Wizard

You can now control the row level security for your data with the configuration wizard. Choose from three security levels: allow users to see all data, their own data, or the data of users with the same role and their subordinates. Previously, security predicates were applied automatically based on your existing settings. You can also select a custom opportunity amount.

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

Who: The template is available for CRM Growth and CRM Plus users.

How: When you follow the configuration steps, the wizard provides the ability to choose row level security and custom opportunity amount options.

From the configuration wizard, in the custom opportunity amount field, enter the amount you want to use.

Build Rich Custom Dashboards with the FSC Wealth Component Library
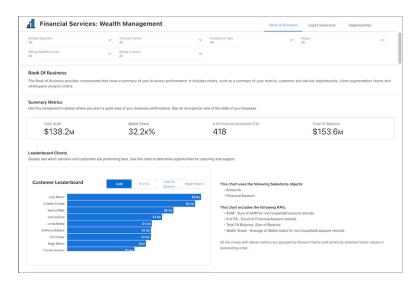
The FSC Wealth Component Library provides recipes and components to build a comprehensive view of your wealth management business for financial advisors, personal bankers, and managers. The components use minimal SAQL and interactions (bindings) to make it easy to customize. In addition, the charts incorporate design and usability best practices.

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: To create the FSC Wealth Component Library app, you must have an RI for Fins Admin permission set. To access the FSC Wealth Component Library app, users must have an RI for Fins User permission set.

How: For new customers, the app is automatically installed. For existing customers, from Analytics Studio, click **Create,** and select **App.** Select **FSC Wealth Component Library**, and then use the wizard to create your app.

Build your dashboards using components from the Book of Business, Leads, and Opportunities libraries:

Analyze Order Management Trends by Using Order Tracking Analytics

Analyze your orders and tasks based on key performance indicators and view the trend across periods by using the new Order Analysis dashboard.

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.

Improve Business by Using Analytics for Consumer Goods - Advanced Data Model

Get insights on territory, account, and sales rep performance with the new Analytics for Consumer Goods - Advanced Data Model app. Sales managers can use the app to improve account compliance, identify accounts at risk, and maximize sales rep effectiveness. Sales reps get account-level insights on visit performance, sales, compliance, and top-selling products.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Analytics for Consumer Goods - Advanced Data Model is available only to Consumer Goods Cloud users. To create an app from the Analytics for Consumer Goods - Advanced Data Model template, you must also have the Consumer Goods Cloud Intelligence add-on license.

How: Go to Analytics Studio, and then create your app by using the **Analytics for Consumer Goods - Advanced Data Model** template.

Analytics App Building

Assess risk and make recommendations for your business in real time with the Input widget. Unify your analytics by incorporating Lightning reports in your CRM Analytics dashboards for a consistent experience. Explore calculated insights, data lake objects, and data models with a single click using CRM Analytics Direct Data for Customer Data Platform.

IN THIS SECTION:

Make Real-Time Decisions with the Input Widget

The Input widget captures numeric values and uses them as a data source for use in other dashboard widgets and formula queries. For example, use values from the input widget to perform what-if calculations, such as the effect of inventory shortages on profit margins in real time.

Move Through Dashboards with a Single Click (Beta)

Create a flow to move between dashboard pages with a single click. For example, go directly to the specific opportunity details page from the account overview chart to see what your next steps are. The single click interaction in a chart navigates dynamically to the detailed information that you need.

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 Customer Data Platform, marketing specialists can now explore calculated insights, data lake objects, and data models from the data object's record page. They can review, profile, and trend data in explorer tables and charts, or run queries on Customer Data Platform right in their business workflow.

Build Queries Easily with the Improved Fields Panel

Add and work with multiple standard or live datasets, Salesforce objects, or Customer Data Platform data sources in the fields panel. Previously, for queries with multiple data sources, the fields panel showed only the primary data source, and you opened a separate lens to view additional data source fields. The redesigned panel organizes each data source's measures, dimensions, and date fields in separate tabs so that you can avoid excessive scrolling. And, when working with Customer Data Platform objects, understand and review relationships between these objects as you create queries.

Make Live Connections to Snowflake More Secure (Beta)

Use OAuth 2.0 authentication when analyzing data in a Snowflake warehouse over a live connection. With this option, each user accesses Snowflake data with a separate login credential and views Snowflake data based on row-level access defined for the user. For example, opportunity owners can view only those opportunities in Snowflake that they own.

Add Lightning Reports to Your Dashboards with Direct Report Queries

Access and interact with all your analytics in a single and consistent experience using Direct Report Queries. Instead of using multiple tools, you can now unify your analytics by incorporating tabular, summary, aggregate, and matrix reports in your CRM Analytics dashboards. You can also build new reports and explore CRM Analytics functionalities to visualize report insights in different ways.

Experience Improved Responsiveness While Editing Dashboards with Multiple Pages

When you edit a dashboard, CRM Analytics now initiates the primary and ancillary queries for the page that you have open instead of waiting for all the dashboard queries to load. You can open other pages to load more queries or run specific queries from the Query tab.

Pivot Table Enhancements (Beta)
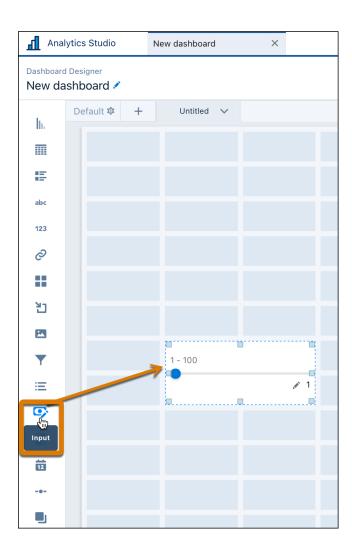
With the new version of compact form, you can view subtotals in a pivot table and sort its records by a measure. View column totals and subtotals in compare tables. Compact form 2.0 now supports values tables.

Make Real-Time Decisions with the Input Widget
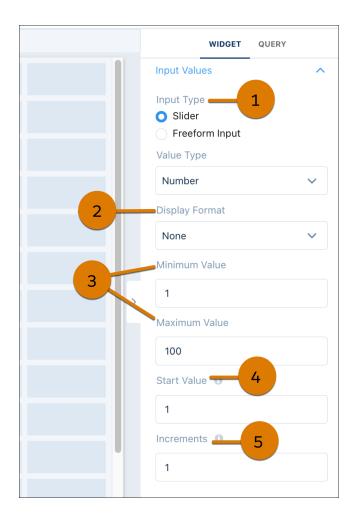
The Input widget captures numeric values and uses them as a data source for use in other dashboard widgets and formula queries. For example, use values from the input widget to perform what-if calculations, such as the effect of inventory shortages on profit margins in real time.

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: Drag the Input widget to the dashboard.

In the widget properties, click **Input Type** (1) to specify how to capture data. Select a display format (2), such as currency or percentage. Add minimum and maximum values (3) as the input range. Add a start value (4), and change increments (5).

Move Through Dashboards with a Single Click (Beta)
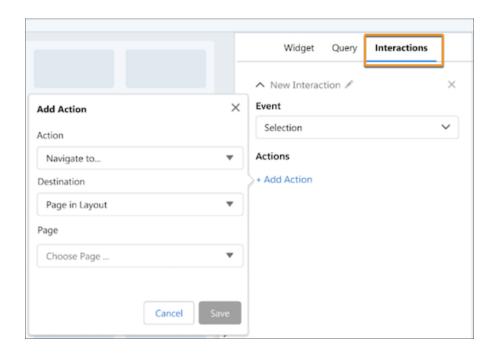
Create a flow to move between dashboard pages with a single click. For example, go directly to the specific opportunity details page from the account overview chart to see what your next steps are. The single click interaction in a chart navigates dynamically to the detailed information that you need.

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. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.
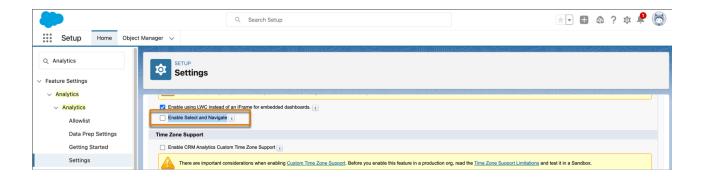
How: Select a chart widget. On the Interactions tab on the Widget Properties panel, add a **Navigate To** action and the destination.

Now your chart has a single click action to take the user from the overview dashboard (1) to the details page (2).

⊘ **Important:** To use this feature in Winter '23, your admin must enable the **Enable Select and Navigate** setting on the Analytics Settings page in Setup.
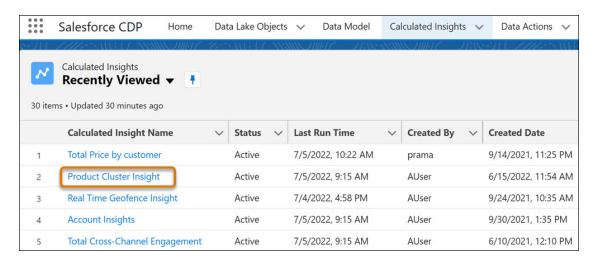
Launch Explorations for Customer Data Platform with a Single Click

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 Customer Data Platform, marketing specialists can now explore calculated insights, data lake objects, and data models from the data object's record page. They can review, profile, and trend data in explorer tables and charts, or run queries on Customer Data Platform right in their business workflow.
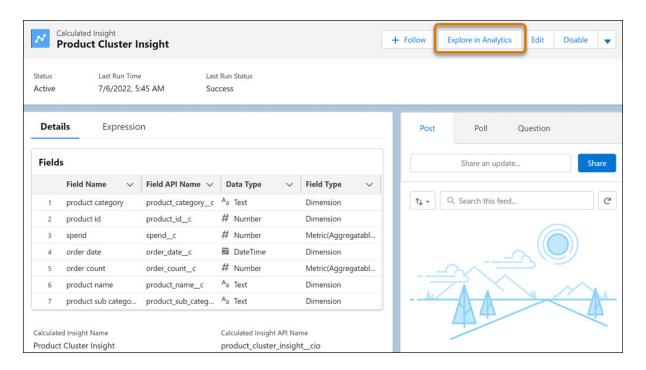
Where: This change applies to CRM Analytics in Lightning Experience Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: CRM Analytics Direct Data for CDP is available to users with a Customer Data Platform license.
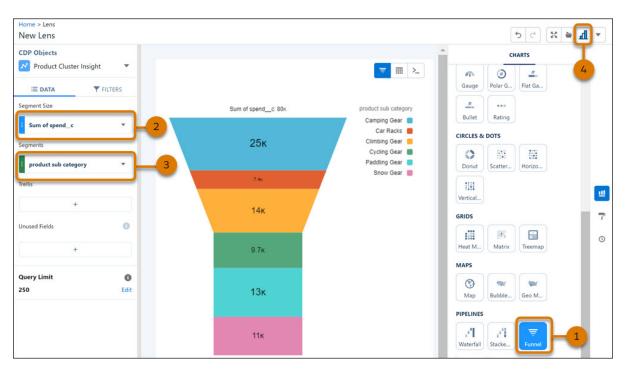
How: For example, to review spending by product subcategories in a funnel chart, in the Calculated Insights tab, click the calculated insight built on product clusters.

From the insight's record page, click **Explore in Analytics**.

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).

SEE ALSO:
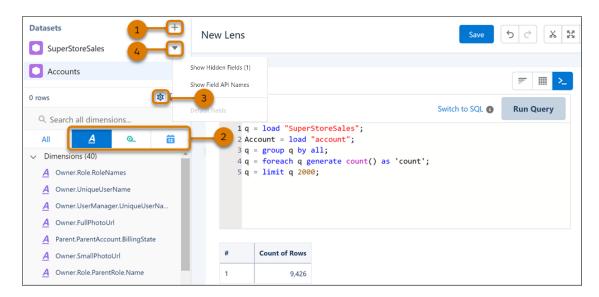
Salesforce Help: Basic CRM Analytics Direct Data for Salesforce CDP Setup (can be outdated or unavailable during release preview)

Build Queries Easily with the Improved Fields Panel
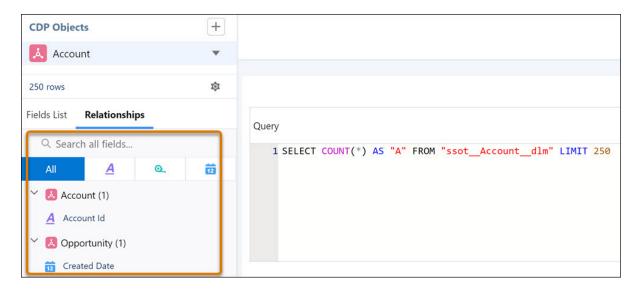
Add and work with multiple standard or live datasets, Salesforce objects, or Customer Data Platform data sources in the fields panel. Previously, for queries with multiple data sources, the fields panel showed only the primary data source, and you opened a separate lens to view additional data source fields. The redesigned panel organizes each data source's measures, dimensions, and date fields in separate tabs so that you can avoid excessive scrolling. And, when working with Customer Data Platform objects, understand and review relationships between these objects as you create queries.

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 Query mode, add a dataset or data source (1). To view fields by type, with the dataset or data source selected, click the appropriate filter tab (2). To view hidden fields or field API names, click the gear $\boxed{\phi}$ icon (3). To remove an unused dataset or data source from the fields panel, click $\boxed{\blacktriangledown}$ next to it (4).

To view which objects a CDP object is related to, click **Relationships**.

Make Live Connections to Snowflake More Secure (Beta)

Use OAuth 2.0 authentication when analyzing data in a Snowflake warehouse over a live connection. With this option, each user accesses Snowflake data with a separate login credential and views Snowflake data based on row-level access defined for the user. For example, opportunity owners can view only those opportunities in Snowflake that they own.

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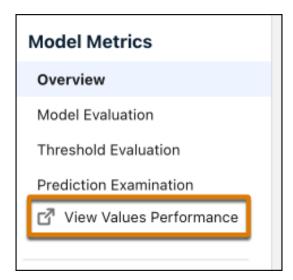
> 📝 Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: After configuring Snowflake for OAuth 2.0 with a service such as Okta, add the authentication provider to Salesforce, and define a named credential. On the Data Manager connect tab, add a live connection, and select the Snowflake Direct connector.

Enter the live connections settings properties, including OAuth for the Authentication Type, and the name value of your named credential.

SEE ALSO:
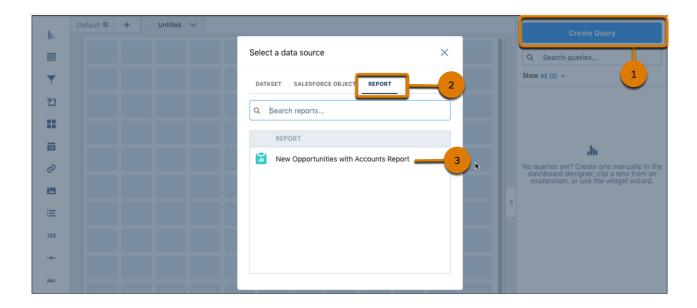
   Salesforce Help: Create a Live Connection to Snowflake (can be outdated or unavailable during release preview)

Add Lightning Reports to Your Dashboards with Direct Report Queries

Access and interact with all your analytics in a single and consistent experience using Direct Report Queries. Instead of using multiple tools, you can now unify your analytics by incorporating tabular, summary, aggregate, and matrix reports in your CRM Analytics dashboards. You can also build new reports and explore CRM Analytics functionalities to visualize report insights in different ways.

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.
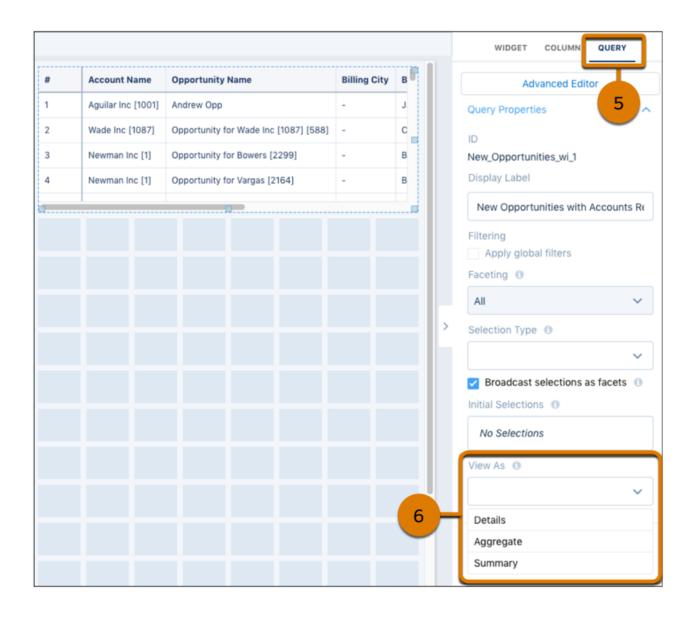
How: With a dashboard open in edit mode, click **Create Query** (1). Click the **Report** tab (2) to select an existing report (3).

Add a widget to your dashboard, and drag the report query onto the widget.

Click the **Query** tab (4), and use the View As dropdown (5) to control how report data is displayed, such as individual record details.
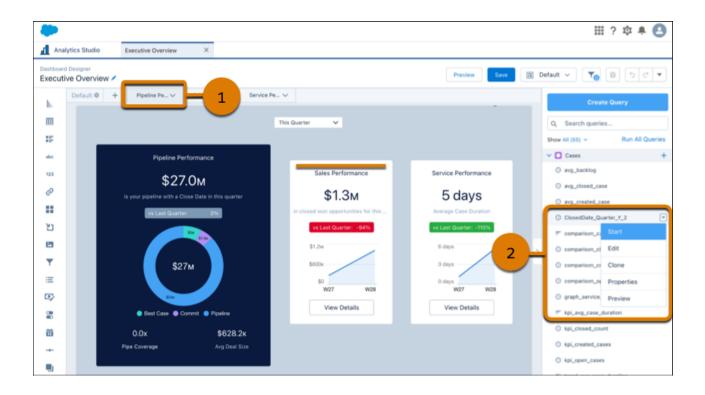
Experience Improved Responsiveness While Editing Dashboards with Multiple Pages

When you edit a dashboard, CRM Analytics now initiates the primary and ancillary queries for the page that you have open instead of waiting for all the dashboard queries to load. You can open other pages to load more queries or run specific queries from the Query 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.
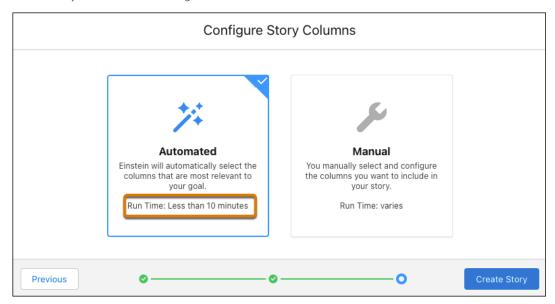
How: When editing a dashboard in CRM Analytics, its associated queries automatically load on the opened page. Click other pages (1) to load more queries, or click **Start** (2) to load a specific query.

Pivot Table Enhancements (Beta)

With the new version of compact form, you can view subtotals in a pivot table and sort its records by a measure. View column totals and subtotals in compare tables. Compact form 2.0 now supports values tables.

IN THIS SECTION:

View Subtotals in Pivot Tables (Beta)

Add subtotals to a pivot table with at least two groupings in addition to the pivoted dimension. Use subtotals in a lens or dashboard to compare similar segments of data to each other or to the overall total. You can even hide the subtotal for a subgroup that you're not interested in.

Sort Pivot Tables by a Measure (Beta)

To evaluate data in a pivot table based on ranking, sort a measure for a pivoted dimension in ascending or descending order. You can sort this column across all subgroups or within its subgroups.

View Subtotals in Pivot Tables (Beta)

Add subtotals to a pivot table with at least two groupings in addition to the pivoted dimension. Use subtotals in a lens or dashboard to compare similar segments of data to each other or to the overall total. You can even hide the subtotal for a subgroup that you're not interested in.

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: To switch to compact form 2.0 (beta), in a new lens, click + to add a second dataset as soon as you open the lens and then remove the second dataset.

For example, your pivot table shows sales data pivoted on region and grouped by product category and product subcategories. To see subtotal sales for each product subcategory across all regions, in Compact form 2.0 mode, click $\sum$ (1), and then select **Show Subtotals** (2).

To hide a subgroup's subtotal, select **Hide Subtotals** from its context menu.

Sort Pivot Tables by a Measure (Beta)

To evaluate data in a pivot table based on ranking, sort a measure for a pivoted dimension in ascending or descending order. You can sort this column across all subgroups or within its subgroups.

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 switch to compact form 2.0 (beta), in a new lens, click ⊞ to add a second dataset as soon as you open the lens and then remove the second dataset.

For example, your pivot table shows sales data pivoted on region and grouped by product category and product subcategories. To identify the product subcategory with the highest sales for a region, in Compact form 2.0 mode, click ▾ in its header (1), and then select **Sort Descending** (2). To find the product subcategory under furniture with the highest sales for the region, click **Sort Within Groups (Desc)** (3).

Einstein Discovery

Deploy models to make predictions with Snowflake data. Identify the most important variables in your model. Get fine-grain model performance of values within variables. See estimated story run time.

IN THIS SECTION:

Make Predictions with Live Snowflake Data

Run predictions from your deployed models with live, external data from Snowflake. You can now set your predictions to use live data outside Salesforce, such as transactions or order history, without having to move and maintain the data.

Identify a Model's Most Important Variables

See the amount of influence each variable has on your model's predictions with importance scores. The higher the importance value, the greater the impact. Previously, only the correlation scores were shown. While the correlation shows the strength of association between the variable and the outcome, the importance shows how much the model uses the variable when predicting the outcome. For example, when predicting energy usage, temperature might be the highest correlated, while air conditioner type is the most important.

Get Fine-Grain Model Performance (Pilot)

Measure the quality of your model for each group in a variable. Performance is shown as a decimal value, where 1 is perfect accuracy. For example, in the variable region, east has a performance score of 0.6, and west a score of 0.5. You can then conclude that the model is performing better for the East than the West.

Estimate Story Run Time (Pilot)

No more wondering how long it'll take your model to complete, Einstein now shows approximately how much time it takes to create a story or update an existing one. While running, Einstein updates the estimated time to completion so that you can feel free to work on other things while Einstein does the heavy model-building lifting for you.

Bring Your Scikit-learn Model to Salesforce

You can now upload and deploy Scikit-learn models in addition to TensorFlow models. Operationalize the results of predictive models to users in Salesforce—regardless of where the model was built—with the support of externally created models.

Save Higher Volumes of Predictions More Quickly (Generally Available)

For models that are deployed using automated prediction fields, you can have up to 500,000 predictions per org per day. If you generate predictions that approach or exceed this limit, use high-volume writeback to quickly save larger quantities of predicted values. High-volume prediction writeback decreases the time it takes to write predictions and avoids row locks related to other processes that might be going on. With high-volume prediction writeback, the default limit is increased to 5 million predictions per org per day. Use the Einstein Discovery REST API to retrieve up to 30 days of prediction history.

Deepen Your Model Evaluation with New and Improved Model Metrics

See how well your model performs compared to theoretical perfection with the new Perfect Model line in the Gains chart. Gauge model accuracy for all your regression models with the predicted versus actual chart and the new residuals chart. For your binary and multiclass classification models, get more details in the confusion matrix with labels that define terms and give their calculations.

Embed Multiclass Predictions in Your Dataset During Data Prep

Easily add predictions from your multiclass classification models to your datasets in the Discovery Predict node of a recipe. Einstein calculates and saves the predicted class and probability for that class for each row in the dataset. For example, sales representatives can optimize upsell efforts by interacting with all their opportunities on a dashboard grouped by upsell option and sorted by predicted likelihood.

Get Predictions, Improvements, and Top Factors in Slack

The CRM Analytics for Slack app unleashes the predictive and prescriptive power of your models on Salesforce report data—directly in Slack. With the Run Prediction action, CRM Analytics for Slack returns an average prediction score, top predictors, recommended actions, and the three most at-risk records in the report. From there, share the predictions with your Slack channels and colleagues.

SEE ALSO:
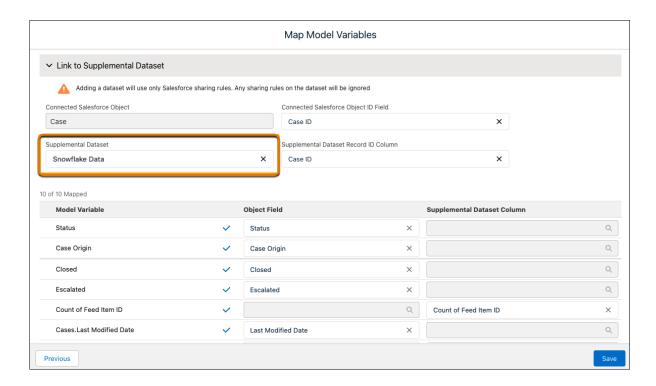
Einstein Release Notes

Make Predictions with Live Snowflake Data

Run predictions from your deployed models with live, external data from Snowflake. You can now set your predictions to use live data outside Salesforce, such as transactions or order history, without having to move and maintain the 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: During model deployment, select the Snowflake dataset as the supplemental dataset and map your model variables.

Salesforce Help: Map Model Variables (can be outdated or unavailable during release preview)
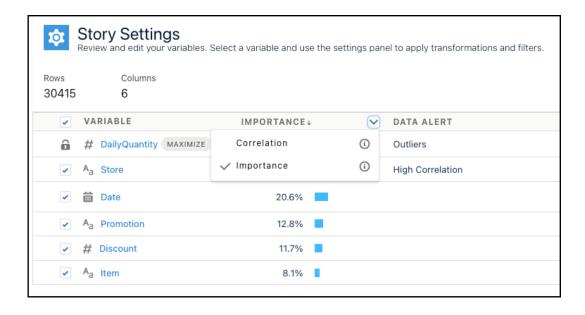
Identify a Model's Most Important Variables

See the amount of influence each variable has on your model's predictions with importance scores. The higher the importance value, the greater the impact. Previously, only the correlation scores were shown. While the correlation shows the strength of association between the variable and the outcome, the importance shows how much the model uses the variable when predicting the outcome. For example, when predicting energy usage, temperature might be the highest correlated, while air conditioner type is the most important.

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, use the new Importance column in the variables table to show correlation or importance.

SEE ALSO:

> *Salesforce Help*: Edit Story Settings (can be outdated or unavailable during release preview)

Get Fine-Grain Model Performance (Pilot)

Measure the quality of your model for each group in a variable. Performance is shown as a decimal value, where 1 is perfect accuracy. For example, in the variable region, east has a performance score of 0.6, and west a score of 0.5. You can then conclude that the model is performing better for the East than the West.

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.

Under Model Metrics, select **View Values Performance**.

In Story Settings, on the Values Performance tab, select variables in the table to see their performance.

💡 **Tip:** Performance is typically similar across the values in a variable. If a particular value stands out, evaluate further. Row counts are also shown for each value. For example, a value may perform differently if it occurs much more or less than others.

SEE ALSO:

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

Salesforce Help: Configure Number Variables (can be outdated or unavailable during release preview)

Estimate Story Run Time (Pilot)

No more wondering how long it'll take your model to complete, Einstein now shows approximately how much time it takes to create a story or update an existing one. While running, Einstein updates the estimated time to completion so that you can feel free to work on other things while Einstein does the heavy model-building lifting for you.

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.

Create a story with automated configuration.

Create a story manually.

Update an existing story.

SEE ALSO:

Salesforce Help: Create a Story (can be outdated or unavailable during release preview)

Salesforce Help: Edit Story Settings (can be outdated or unavailable during release preview)

Bring Your Scikit-learn Model to Salesforce
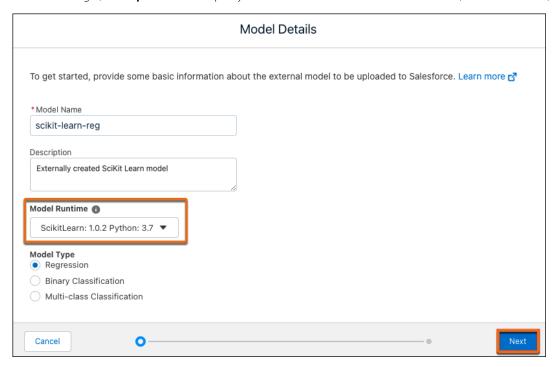
You can now upload and deploy Scikit-learn models in addition to TensorFlow models. Operationalize the results of predictive models to users in Salesforce—regardless of where the model was built—with the support of externally created models.

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: Bundle all files associated with your Scikit-learn model in a .zip file, including:

- saved_model.pkl
- data_processor.py
- validation.csv

In Model Manager, click **Upload Model**. Specify details about the model. For Model Runtime, select ScikitLearn, and click **Next**.

Specify the model variables, and select the outcome that the model predicts.

Select the .zip file containing the model files, and click **Done**. You can either deploy this model immediately into your Salesforce environment, or add it to the Uploaded Files tab for later deployment.

SEE ALSO:
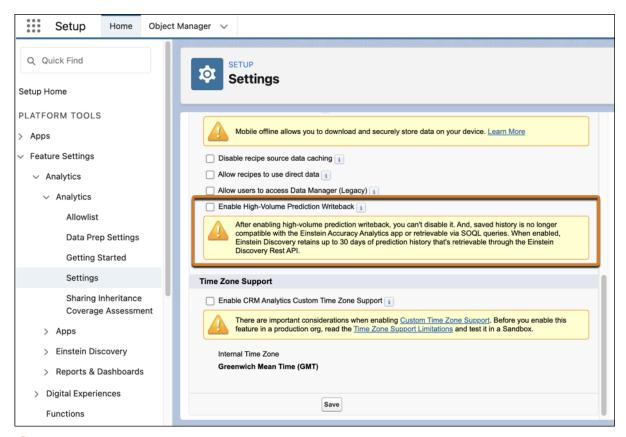
> *Salesforce Help*: Operationalize External Machine Learning Models (can be outdated or unavailable during release preview)

Save Higher Volumes of Predictions More Quickly (Generally Available)

For models that are deployed using automated prediction fields, you can have up to 500,000 predictions per org per day. If you generate predictions that approach or exceed this limit, use high-volume writeback to quickly save larger quantities of predicted values. High-volume prediction writeback decreases the time it takes to write predictions and avoids row locks related to other processes that might be going on. With high-volume prediction writeback, the default limit is increased to 5 million predictions per org per day. Use the Einstein Discovery REST API to retrieve up to 30 days of prediction history.
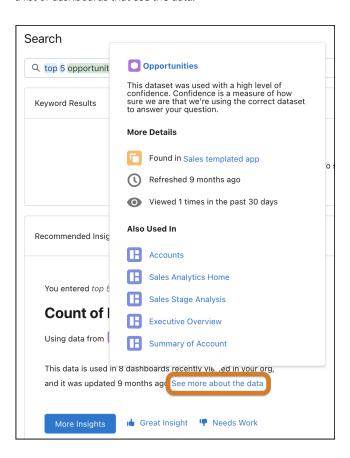
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: High-volume prediction writeback is automatically enabled in orgs created after the Winter '23 release. For existing orgs, from Setup, in the Quick Find box, enter **Analytics**, and then select **Settings**. Select **Enable High-Volume Prediction Writeback**.

! **Important:** After you enable high-volume prediction writeback, you can't disable it. With high-volume prediction writeback, Einstein Discovery retains up to 30 days of prediction history instead of forever. The saved data is retrievable only via the Einstein Discovery REST API, and it's no longer compatible with the Einstein Accuracy Analytics app or retrievable via SOQL queries.

SEE ALSO:
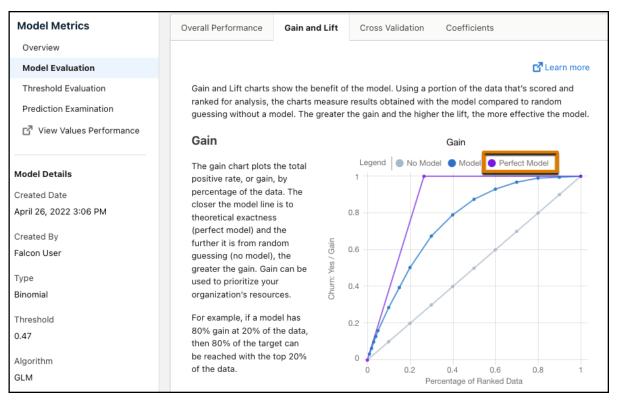
Salesforce Help: Einstein Discovery REST API Developer Guide (can be outdated or unavailable during release preview)

Deepen Your Model Evaluation with New and Improved Model Metrics
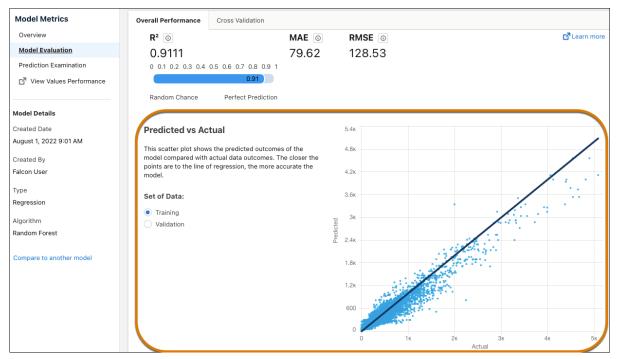
See how well your model performs compared to theoretical perfection with the new Perfect Model line in the Gains chart. Gauge model accuracy for all your regression models with the predicted versus actual chart and the new residuals chart. For your binary and multiclass classification models, get more details in the confusion matrix with labels that define terms and give their calculations.

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.
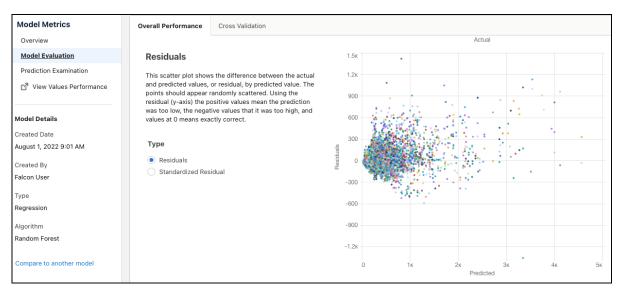
How: To see the perfect model line, select **Model Evaluation** and select the **Gain and Lift** tab.
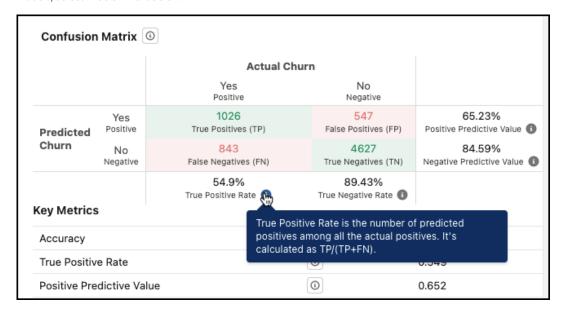
To see the predicted versus actual chart for regression models, select **Model Evaluation**, and see the Overall Performance tab. The predicted versus actual chart is available for all regression models. Previously, it was only available for models using the GLM algorithm. If your story has a validation dataset, you can choose to analyze the training or validation data.

To see the new residuals chart for regression models, select **Model Evaluation**, and on the Overall Performance tab, scroll down. Choose to see either residual or standardized values. If your story has a validation dataset, you can choose to analyze the training or validation data.

The improved confusion matrix dynamically includes your outcome variable, has more detailed labels, and features info bubbles that describe the metric and how it's calculated. For binary classification models, select **Threshold Evaluation**. For multiclass classification models, select **Model Evaluation**.

SEE ALSO:
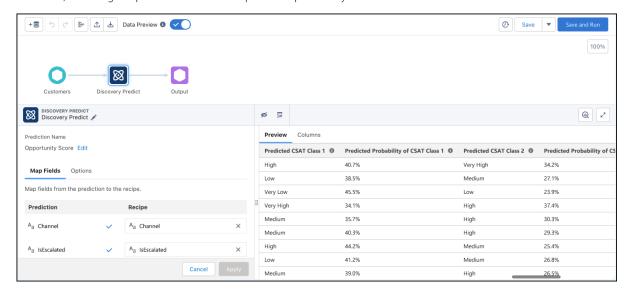
Salesforce Help: Evaluate Model Quality (can be outdated or unavailable during release preview)

Embed Multiclass Predictions in Your Dataset During Data Prep

Easily add predictions from your multiclass classification models to your datasets in the Discovery Predict node of a recipe. Einstein calculates and saves the predicted class and probability for that class for each row in the dataset. For example, sales representatives can optimize upsell efforts by interacting with all their opportunities on a dashboard grouped by upsell option and sorted by predicted likelihood.

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 a Discovery Predict node of a Data Prep recipe, select your multiclass classification model. Preview shows two new columns for each class, including the predicted class and its predicted probability.

Salesforce Help: Discovery Predict Transformation: Get Einstein Discovery Predictions (can be outdated or unavailable during release preview)

Get Predictions, Improvements, and Top Factors in Slack

The CRM Analytics for Slack app unleashes the predictive and prescriptive power of your models on Salesforce report data—directly in Slack. With the Run Prediction action, CRM Analytics for Slack returns an average prediction score, top predictors, recommended actions, and the three most at-risk records in the report. From there, share the predictions with your Slack channels and colleagues.

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.

To learn more, see Collaborate More Effectively with CRM Analytics for Slack on page 134.

CRM Analytics for Everyone

Experience advanced browsing with filters that manage all CRM Analytics assets and Lightning reports and dashboards in one seamless user interface. Explore Ask Data for Salesforce recommended insights directly on the Search page. Collaborate more effectively using CRM Analytics for Slack by keeping up with new developments in Salesforce for Slack Integrations.

IN THIS SECTION:

Browse and Search in Analytics Home

Use Analytics Home for contextual search capabilities, such as browse and find, to discover insights with speed. Apply filters to manage all CRM Analytics assets and Lightning reports and dashboards in one user interface.

Quickly Return to Recent Search Insights

Ask Data for Salesforce now saves your natural language searches in addition to your keyword searches. All changes you make on the Insights page to map words to datasets and fields are also saved. Click in the search field and select a recent search to view the insight you had last time. The search field menu offers five recent searches at a time and saves your searches for up to 30 days.

Explore Recommended Insights on the Search Page

In the new interface on the CRM Analytics Search page, Ask Data for Salesforce now returns three recommended insights, two more than before. To help you verify that an insight shows what you're looking for, each insight includes information about the data used. You can also explore and improve the insight by specifying another dataset.

Collaborate More Effectively with CRM Analytics for Slack

Browse, search, and share CRM Analytics and Lightning reports and dashboards in Slack to get data insights within the flow of your work. Stay updated on your key data, collaborate with subscriptions and notifications, view predictions and recommendations, and take action at the point of insight. CRM Analytics for Slack is the Salesforce for Slack Integrations app for all CRM Analytics and Lightning reports and dashboards. The app recently became generally available and we continue to add features. Keep up with the latest developments in the CRM Analytics for Slack section of the Salesforce for Slack Integrations Release Notes.

Publish Tableau Online Content to CRM Analytics (Beta)

Gain insights on Tableau Cloud data from the comfort of CRM Analytics Home. Easily publish Tableau Cloud dashboards, sheets, and stories to a CRM Analytics app or Lightning page without embedding Tableau views or installing additional software. Combine Tableau Cloud and CRM Analytics content seamlessly in a dashboard, apply Tableau filters to it, and share it with others who need to stay on top of the same data. You can also embed a Tableau view to a Lightning page using the Lightning App Builder. To access the published Tableau content more easily, favorite the dashboard in Analytics Home.

Browse and Search in Analytics Home

Use Analytics Home for contextual search capabilities, such as browse and find, to discover insights with speed. Apply filters to manage all CRM Analytics assets and Lightning reports and dashboards in one user interface.

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.
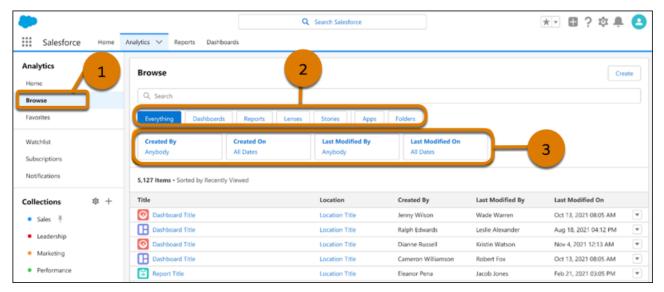
📝 Note: The Browse enhancement is an update to the Unified Experience for Analytics Home feature, which is a Beta Service. You get Unified Experience by enabling it in Analytics settings.

Who: Users with access to the Analytics Studio and Analytics tab can use filters. User and team app sharing rules determine which assets are returned.

How: On the Analytics Home page, click the **Browse** tab (1).

Primary filters (2) set the current context and determine which filters and columns are available to the user. Use the secondary filters (3) for further refinement using metadata related to Created Date, Modified Date, Created By, and Last Modified By.
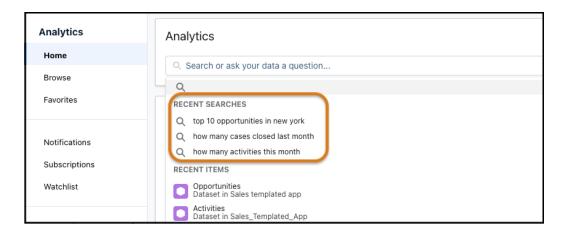
Quickly Return to Recent Search Insights

Ask Data for Salesforce now saves your natural language searches in addition to your keyword searches. All changes you make on the Insights page to map words to datasets and fields are also saved. Click in the search field and select a recent search to view the insight you had last time. The search field menu offers five recent searches at a time and saves your searches for up to 30 days.

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: The Ask Data for Salesforce service is enabled by default in production orgs with 1,000 or more reports and active use of the Analytics Home page. The service 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.

SEE ALSO:

Salesforce Help: Get Data Answers While You Search with Ask Data for Salesforce (can be outdated or unavailable during release preview)

Explore Recommended Insights on the Search Page

In the new interface on the CRM Analytics Search page, Ask Data for Salesforce now returns three recommended insights, two more than before. To help you verify that an insight shows what you're looking for, each insight includes information about the data used. You can also explore and improve the insight by specifying another dataset.

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Who: Ask Data for Salesforce is available for users with a CRM Analytics Plus license.
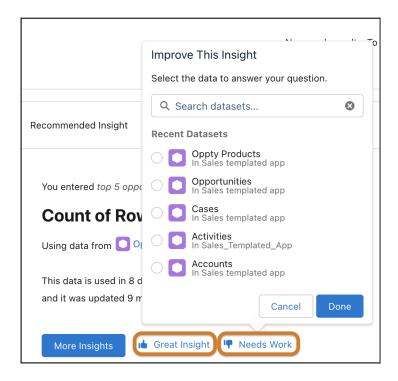
How: Enter a natural language query in the CRM Analytics search field. The Search page returns insights based on the top datasets that Ask Data for Salesforce identified as best answering your question. Click the arrows to explore the other recommendations.

Click **See more about the data** to view details that can help you determine if an insight is using the data that you want. You also get a list of dashboards that use the data.

Did you find a helpful insight? Give us feedback about it. Click **Great Insight**, and Ask Data for Salesforce remembers the dataset to use the next time that you ask the same question. Click **Needs Work** to improve the insight by selecting another dataset.

Salesforce Help: Get Data Answers While You Search with Ask Data for Salesforce (can be outdated or unavailable during release preview)

Collaborate More Effectively with CRM Analytics for Slack

Browse, search, and share CRM Analytics and Lightning reports and dashboards in Slack to get data insights within the flow of your work. Stay updated on your key data, collaborate with subscriptions and notifications, view predictions and recommendations, and take action at the point of insight. CRM Analytics for Slack is the Salesforce for Slack Integrations app for all CRM Analytics and Lightning reports and dashboards. The app recently became generally available and we continue to add features. Keep up with the latest developments in the CRM Analytics for Slack section of the Salesforce for Slack Integrations Release Notes.

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. CRM Analytics for Slack is available for use where approved by a workspace admin and installed in Slack.

Who: Users must have the Connect Salesforce with Slack permission. To work with CRM Analytics, users must have the Use CRM Analytics, Subscribe to CRM Analytics Assets, and Add Recipients to CRM Analytics Notifications permissions. To subscribe to Lightning reports and dashboards or import subscriptions, users must have the Subscribe to Dashboards, Subscribe to Dashboards: Add Recipients, Subscribe to Reports, and Subscribe to Reports: Add Recipients permissions. To run predictions, users must have the View Einstein Discovery Recommendations permission.

Salesforce Help: CRM Analytics for Slack (can be outdated or unavailable during release preview)

Salesforce Help: CRM Analytics for Slack Release Notes (can be outdated or unavailable during release preview)

Salesforce Help: Enable Salesforce for Slack Integrations (can be outdated or unavailable during release preview)

Publish Tableau Online Content to CRM Analytics (Beta)

Gain insights on Tableau Cloud data from the comfort of CRM Analytics Home. Easily publish Tableau Cloud dashboards, sheets, and stories to a CRM Analytics app or Lightning page without embedding Tableau views or installing additional software. Combine Tableau Cloud and CRM Analytics content seamlessly in a dashboard, apply Tableau filters to it, and share it with others who need to stay on top of the same data. You can also embed a Tableau view to a Lightning page using the Lightning App Builder. To access the published Tableau content more easily, favorite the dashboard in Analytics Home.

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.
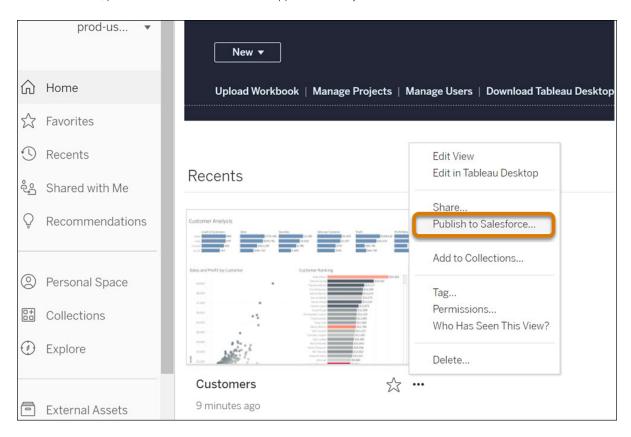
📝 Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.
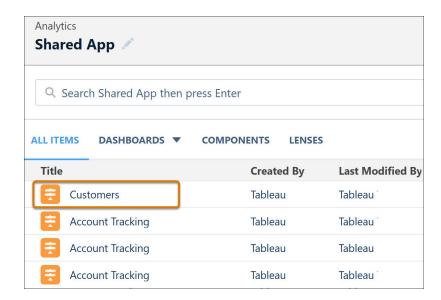
Who: Tableau Online views are available to users with a CRM Analytics Plus license or CRM Analytics Growth license and Creator or Explorer license for Tableau Cloud. To use Tableau Online views, contact your Salesforce Account Executive.

How: Complete setup steps in Tableau Online. In Salesforce, from Setup, in the Quick Find box, enter `Analytics`, and then select **Allow users to publish content from Tableau online to CRM Analytics (Beta)**.

In Tableau Online, publish Tableau views to a shared app in CRM Analytics.

In Analytics Home, click the published Tableau Online content to review it.

Commerce

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

IN THIS SECTION:

B2B and B2B2C Commerce
Use expanded global selling features to add multiple languages and sell in more countries. Quickly set up taxes using the new included tax solution. Use the expanded promotions features, including promotion limits and updated priority rules. Get more guidance during product import. Use expressions in component text fields, and create a B2C store on an existing site.

Salesforce Order Management
Create orders on behalf of shoppers. Ingest orders at high scale. Charge return fees, and select the payment method for a refund. And you can now record a reason when rejecting fulfillment order items.

Salesforce Payments

Offer shoppers a smooth and secure checkout experience with Salesforce Payments, available for Salesforce B2C Commerce and as a new application on the Salesforce platform. Simplify integration with Salesforce B2B2C Commerce and Salesforce Order Management, protect against fraud, and access payments reports for data insights.

B2B and B2B2C Commerce

Use expanded global selling features to add multiple languages and sell in more countries. Quickly set up taxes using the new included tax solution. Use the expanded promotions features, including promotion limits and updated priority rules. Get more guidance during product import. Use expressions in component text fields, and create a B2C store on an existing site.

IN THIS SECTION:

Global Sales

Choose from an expanded lists of countries and use more languages in B2C stores. Set up taxes quickly.

Commerce Promotions

Choose from an expanded list of discount options, and create buy-one-get-one (BOGO) deals. Set limits to control how many times a promotion is applied. Automatically apply category promotions to variants. Learn about updated prioritization rules.

Product Import

Get guidance during import, and see which records are updated.

Search the Product Workspace

Use the search box in the Product workspace to search across any field in the table.

Use the Connect API for Commerce Subscriptions

Connect API resources now support subscriptions and multiple product selling models. The three models are one time, term, and evergreen. In the one-time model, the product is sold for a specific price at a specific time. In the term model, the product is sold for a specific amount of time, such as for 12 months. In the evergreen model, the product is sold on a recurring basis until the subscription is canceled.

Create a Convenient, Flexible Experience with the My Account Theme Layout in Your B2C Store

Set up a rich and varied experience in your B2C store with the new My Account theme layout. Get persistent left-side page navigation, and link to standard and custom pages. As your customer navigates from page to page, linked content appears on the right while the navigation menu stays consistent and visible on the left. The layout comes with a My Profile page menu item. You can add standard and custom menu items.

Use Dynamic Expressions in Text Fields in Your B2C Stores

Instead of using static text, add expressions to text fields for dynamic output. On pages with data provider components, use expressions to pull your Salesforce data into the displayed component. For example, show an offer that's based on whether the unit price is more than $100.00. For stores created in Winter '23 or later, all B2C Commerce template component text fields accept expressions. Select from the provided expressions, or create your own.

Let Non-Admin Users Delete Account Addresses

Non-admin users with Edit access on an account can delete an account address on the account's Related tab. Previously, non-admin users could only update an account address.

More Easily Migrate Your B2C Store's Configuration

You can migrate a B2C store's configuration to a new environment, such as from sandbox to production, from the UI. Previously, this functionality was available only for B2B stores.

Add a B2C Store to an Experience Cloud Site

Now you can create a B2C store on your existing site. Reuse your domain and site settings, branding, and styling to quickly build an integrated experience for your customers. When you add a store, your existing site stays the same, but you get access to commerce features, pages, and components.

Understand SEO for B2B and B2B2C Commerce

Drive more traffic to your B2B or B2C store with search engine optimization (SEO). New SEO documentation provides guidance on how to add HTML meta tags to pages, use canonical and shopper-friendly URLs, manage the store sitemap, and provide store snapshots to web crawlers.

Global Sales

Choose from an expanded lists of countries and use more languages in B2C stores. Set up taxes quickly.

IN THIS SECTION:

Use Multiple Languages in a B2C Store

B2C stores now support multiple languages. The built-in search index supports up to 10 languages, and you can have a maximum of 25 languages if you don't use the built-in search index.

Sell Globally in More Countries

You have more choices for which country to assign to a B2C store. You can select one country per store. For B2C stores, you can ship products only to the country assigned to the store.

Offer Language Options in a B2C Store

Give customers the opportunity to shop in their preferred language. The B2C store template now includes a Language Selector component, so a visitor can choose any language that you offer. Configure the language settings in your store, and add translated content. Then, in Experience Builder, customize the Language Selector component. For new stores, the Language Selector component is located in the footer by default.

Quickly Set Up Taxes for a Store
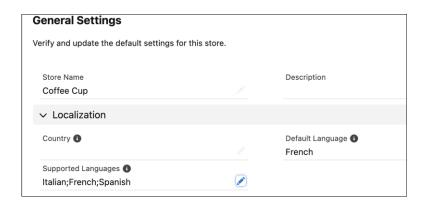
If your B2B or B2C store uses gross taxation, with taxes included in the product prices, you don't have to integrate a third-party tax calculation service for tax percent calculations at the country level. Instead, you can use the included Salesforce tax solution to quickly set up the tax rate.

Use Multiple Languages in a B2C Store

B2C stores now support multiple languages. The built-in search index supports up to 10 languages, and you can have a maximum of 25 languages if you don't use the built-in search index.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: On the store's Administration General Settings tab, select the languages.

SEE ALSO:
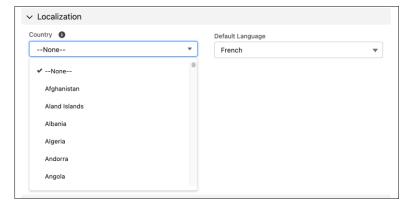
 Salesforce Help: Configure the Language, Country, and Currency for a B2C Store (can be outdated or unavailable during release preview)

Sell Globally in More Countries

You have more choices for which country to assign to a B2C store. You can select one country per store. For B2C stores, you can ship products only to the country assigned to the store.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: On the store's Administration General Settings tab, select the country for your B2C store. If you have a B2B store, the Country field is also shown but the field is applicable only for B2C stores.

For some countries, you have to write customized code to use the country. For a list of the supported countries, see *Salesforce Help*: Configure the Language, Country, and Currency for a B2C Store (link can be outdated or unavailable during release preview).

Offer Language Options in a B2C Store

Give customers the opportunity to shop in their preferred language. The B2C store template now includes a Language Selector component, so a visitor can choose any language that you offer. Configure the language settings in your store, and add translated content. Then, in Experience Builder, customize the Language Selector component. For new stores, the Language Selector component is located in the footer by default.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Configure the Language, Country, and Currency for a B2C Store (can be outdated or unavailable during release preview)

Salesforce Help: Add Languages to Your Experience Builder Sites (can be outdated or unavailable during release preview)

Salesforce Help: Manage Translations (can be outdated or unavailable during release preview)
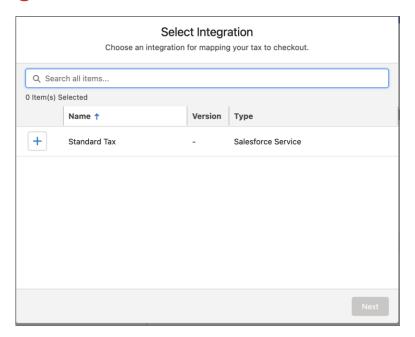
Quickly Set Up Taxes for a Store

If your B2B or B2C store uses gross taxation, with taxes included in the product prices, you don't have to integrate a third-party tax calculation service for tax percent calculations at the country level. Instead, you can use the included Salesforce tax solution to quickly set up the tax rate.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the store's Administration tile, use the Tax Calculation page to select the Salesforce tax solution. Assign a tax policy to the store, and then set up tax rates and tax treatments for the tax policy.

🛑 **Important:** We recommend that you consult with a tax expert before configuring taxes for your store.

SEE ALSO:

Salesforce Help: Configure the Salesforce Tax Solution (can be outdated or unavailable during release preview)

Commerce Promotions

Choose from an expanded list of discount options, and create buy-one-get-one (BOGO) deals. Set limits to control how many times a promotion is applied. Automatically apply category promotions to variants. Learn about updated prioritization rules.

IN THIS SECTION:

Set a Promotional Price for Products

Skip the discount math, and offer a product or set of products for a simple fixed price. For example, if a type of coffee usually costs $25 per bag, set up a fixed price discount to temporarily sell it for $20. Or, create a total fixed price discount to sell any three coffees for $25 total.

Deduct a Fixed Amount from an Entire Order

Offer promotions that deduct a set dollar amount from the entire transaction. For example, take $10 off carts that total at least $100.

Bring on the BOGO Deals

Entice your customers with the lure of a good buy-one-get-one (BOGO) sale. For example, create a promotion that offers customers who buy one bag of coffee beans 50% off a second bag. Use discount and qualifier rules to create more-advanced BOGO deals.

Apply Limits to Promotions

Limit the number of items that can receive a discount, or control how many times a promotion can apply to a cart. Or combine these settings with qualifiers to create sophisticated buy-one-get-one deals.

Promotion Priority Rules Include Tiebreakers

When two or more applicable promotions have the same priority number, the store analyzes discount details to break the tie. If the promotions share a discount type, the best deal wins. If the promotions share a priority number and discount type, the biggest discount for the customer wins. Previously, if two promotions shared a priority number, only their Salesforce ID numbers were used to determine which to apply first.

Set a Promotional Price for Products

Skip the discount math, and offer a product or set of products for a simple fixed price. For example, if a type of coffee usually costs $25 per bag, set up a fixed price discount to temporarily sell it for $20. Or, create a total fixed price discount to sell any three coffees for $25 total.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: When you add a discount to your promotion, in the Adjustment Type field, select **Fixed Price** or **Total Fixed Price**, then enter the discount amount. For a total fixed price discount, enter a quantity limit. Your customer must reach the quantity limit to receive the total fixed price discount.

SEE ALSO:

Salesforce Help: Create and Manage Promotions (can be outdated or unavailable during release preview)

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

Deduct a Fixed Amount from an Entire Order

Offer promotions that deduct a set dollar amount from the entire transaction. For example, take $10 off carts that total at least $100.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Create and Manage Promotions (can be outdated or unavailable during release preview)

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

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Entice your customers with the lure of a good buy-one-get-one (BOGO) sale. For example, create a promotion that offers customers who buy one bag of coffee beans 50% off a second bag. Use discount and qualifier rules to create more-advanced BOGO deals.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: When you create a promotion, add one or more qualifiers. The qualifiers are the "buy one" part of the equation. Then add discount targets to determine what a customer gets. A BOGO promotion excludes the qualifying item from also being the discounted item. To configure this option, select **Exclude qualifying Items from discounts.** You can also add a promotion or quantity limit as needed.

SEE ALSO:

Salesforce Help: Create and Manage Promotions (can be outdated or unavailable during release preview)

Apply Limits to Promotions

Limit the number of items that can receive a discount, or control how many times a promotion can apply to a cart. Or combine these settings with qualifiers to create sophisticated buy-one-get-one deals.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Create and Manage Promotions (can be outdated or unavailable during release preview)

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

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

Promotion Priority Rules Include Tiebreakers

When two or more applicable promotions have the same priority number, the store analyzes discount details to break the tie. If the promotions share a discount type, the best deal wins. If the promotions share a priority number and discount type, the biggest discount for the customer wins. Previously, if two promotions shared a priority number, only their Salesforce ID numbers were used to determine which to apply first.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Create and Manage Promotions (can be outdated or unavailable during release preview)

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

Product Import

Get guidance during import, and see which records are updated.

IN THIS SECTION:

Get More Guidance During a CSV Import

More detailed error and warning messages are available during a CSV import. For example, warning messages are displayed if the URL for media isn't valid. Error messages are displayed if the entitlement policy or other records aren't found or if there are duplicate column headings. Use the messages to troubleshoot the CSV file and determine if some products didn't import correctly.

When you use a CSV file to import data for a specific store, products are automatically assigned to certain related records, including records for catalog, category, entitlement policy, and price book. The store's import page now lists the default records so that you know which records will be updated before you begin the import.

Get More Guidance During a CSV Import

More detailed error and warning messages are available during a CSV import. For example, warning messages are displayed if the URL for media isn't valid. Error messages are displayed if the entitlement policy or other records aren't found or if there are duplicate column headings. Use the messages to troubleshoot the CSV file and determine if some products didn't import correctly.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:
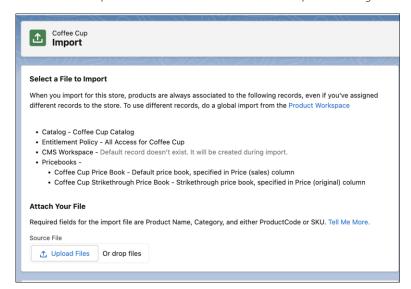
Salesforce Help: Import (can be outdated or unavailable during release preview)

See Which Records Are Updated During Store Import

When you use a CSV file to import data for a specific store, products are automatically assigned to certain related records, including records for catalog, category, entitlement policy, and price book. The store's import page now lists the default records so that you know which records will be updated before you begin the import.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Click the Import tile to see the list of default records updated during a CSV import.

SEE ALSO:

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

Search the Product Workspace

Use the search box in the Product workspace to search across any field in the table.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Commerce App navigation menu, select **Product Workspace**. Enter the search term in the search box.

SEE ALSO:

Salesforce Help: Search the Product Workspace (can be outdated or unavailable during release preview)

Use the Connect API for Commerce Subscriptions

Connect API resources now support subscriptions and multiple product selling models. The three models are one time, term, and evergreen. In the one-time model, the product is sold for a specific price at a specific time. In the term model, the product is sold for a specific amount of time, such as for 12 months. In the evergreen model, the product is sold on a recurring basis until the subscription is canceled.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Commerce Webstore Product (can be outdated or unavailable during release preview)
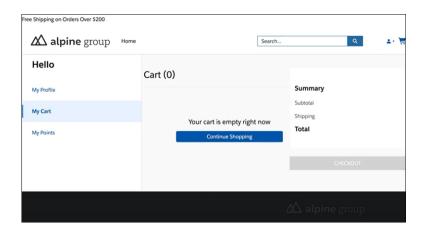
Commerce Webstore Pricing Product (can be outdated or unavailable during release preview)

Create a Convenient, Flexible Experience with the My Account Theme Layout in Your B2C Store

Set up a rich and varied experience in your B2C store with the new My Account theme layout. Get persistent left-side page navigation, and link to standard and custom pages. As your customer navigates from page to page, linked content appears on the right while the navigation menu stays consistent and visible on the left. The layout comes with a My Profile page menu item. You can add standard and custom menu items.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Stores created as of Winter '23 get the My Account theme layout by default. Existing stores can add the layout. In Experience Builder, open page properties. In the My Profile page settings, override the default theme layout for the page, and select **My Account Layout**.

SEE ALSO:

Salesforce Help: Create Custom Pages with Experience Builder (can be outdated or unavailable during release preview)

Use Dynamic Expressions in Text Fields in Your B2C Stores

Instead of using static text, add expressions to text fields for dynamic output. On pages with data provider components, use expressions to pull your Salesforce data into the displayed component. For example, show an offer that's based on whether the unit price is more than $100.00. For stores created in Winter '23 or later, all B2C Commerce template component text fields accept expressions. Select from the provided expressions, or create your own.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: For example:

- Create offers based on whether the list price is less than the unit price.
- Show special deals based on a product's brand.
- Highlight customer savings.

Let Non-Admin Users Delete Account Addresses

Non-admin users with Edit access on an account can delete an account address on the account's Related tab. Previously, non-admin users could only update an account address.
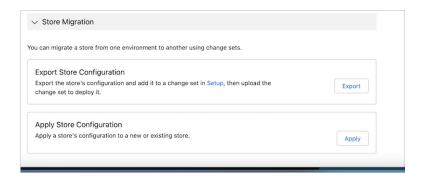
Where: This change applies to B2B and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

More Easily Migrate Your B2C Store's Configuration

You can migrate a B2C store's configuration to a new environment, such as from sandbox to production, from the UI. Previously, this functionality was available only for B2B stores.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Create an outbound change set. Then on the store's Administration General Settings tab, under the Store Migration section, apply the store configuration to a new environment.

Add a B2C Store to an Experience Cloud Site

Now you can create a B2C store on your existing site. Reuse your domain and site settings, branding, and styling to quickly build an integrated experience for your customers. When you add a store, your existing site stays the same, but you get access to commerce features, pages, and components.

Where: This change applies to B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Stores page, click **Create a Store on an Existing Site**, and follow the instructions to add a B2C store.

Understand SEO for B2B and B2B2C Commerce

Drive more traffic to your B2B or B2C store with search engine optimization (SEO). New SEO documentation provides guidance on how to add HTML meta tags to pages, use canonical and shopper-friendly URLs, manage the store sitemap, and provide store snapshots to web crawlers.

Where: This change applies to B2B Commerce and B2B2C Commerce in Enterprise, Unlimited, and Developer editions.

Salesforce Order Management

Create orders on behalf of shoppers. Ingest orders at high scale. Charge return fees, and select the payment method for a refund. And you can now record a reason when rejecting fulfillment order items.

IN THIS SECTION:

Order on Behalf of a Shopper

Streamline the ordering process by creating orders for shoppers using a sequence of API endpoints. Service agents can now directly place orders for shoppers instead of instructing them to place the order themselves.

Easily Pick and Pack Online Orders

Increase productivity with simple steps to handle BOPIS and ship-from-store orders. Use pre-built flows to help your store staff locate new orders, track fulfillment, and complete orders.

Ingest B2C Commerce Orders at High Scale

Easily handle increased shopper traffic during holidays and sales by ingesting up to 5,000 Salesforce B2C Commerce orders per minute and processing up to 2,500 per minute. The new Pending Order Summary object represents an order that's ingested but doesn't yet have an order summary. To create an order summary without waiting for the automated process, search for the pending order summary record in Salesforce and then import it.

Automatically Reroute Rejected Fulfillment Orders with the Distributed Order Management Flows

If you use the Distributed Order Management Routing package, you no longer have to reroute fulfillment orders that have been rejected by fulfillment locations. The flows now do it automatically! And they're smart—they don't reroute in-store pickup (BOPIS) orders, and they don't reroute a fulfillment order to a location that's already rejected it. You can also configure the number of rerouting attempts allowed per fulfillment order. To implement this feature, deploy and configure the latest version of the package.

Sequence Payment Methods When Processing a Refund

You now have the flexibility to control the sequence of payment methods used in the refund process. When ensuring a refund, specify an ordered list of order payment summaries and, optionally, corresponding refund amounts. If the list doesn't cover the entire refund amount, you can apply the default logic to ensure the remaining amount or leave that amount on the credit memo to ensure later. You can also implement a wrapper for the Ensure Refunds action or API resource that builds the sequence list according to custom logic. We provide example code that demonstrates how to do so using a custom invocable action.

Charge Return Fees

Now you can charge a fee when returning an order item. A return fee is represented by a return order line item with the new Type value `Fee`, which is associated with the existing TypeCode value `Charge`. You can charge return fees using the API resources and actions for return orders. Create one or more products to represent return fees. When you create a return order, specify a return fee product and the fee details in the input for an order item that includes a return fee.

Specify a Reason When Rejecting a Fulfillment Order Line Item

You can assign a reject reason when a fulfillment location rejects a fulfillment order item with the new RejectReason picklist field on the Fulfillment Order Line Item object. Also, the Fulfillment Order object's Status picklist field includes the new value `Rejected`, associated with the new StatusCategory `Rejected`, and the new values `Printed` and `Pick Complete`, both associated with the existing StatusCategory `Fulfilling`. Starting in Winter '23, the Distributed Order Management Routing package uses these elements.

Configure Delivery and Apply Payment Promotions When Adding an Item to an Existing B2C Commerce Order

You can implement this added functionality because several Commerce WebStore API resources now support B2C Commerce.

Self-Provision the Connection Between B2C Commerce and Order Management

Use the new B2C Commerce Connections page in Salesforce to provision the connection. Use the new Salesforce Order Management Integration Administration page in the B2C Commerce Business Manager to activate the integration.

Efficiently Handle B2C Commerce Orders When Omnichannel Inventory Is Unavailable

The B2C Commerce storefront and Order Management both communicate with Omnichannel Inventory as part of their order placement and routing processes. These processes can handle temporary communication issues via exception checking and retries, but extended disruptions can require more intervention to avoid order failures. With the updated Omnichannel Inventory Downtime Playbook and package, you can implement a more streamlined process that requires less manual intervention.

Find Order Management Implementation Instructions More Easily

The implementation instructions for Salesforce Order Management are reorganized into guides tailored to the product that you used to create your store.

Enhanced Domains are now required for all non-production Salesforce orgs, including sandboxes. When you turn on Enhanced Domains, the login URL changes. If your org is integrated with a B2C Commerce storefront, open a case with Salesforce Support and provide your new login URL. To find the login URL, click your profile image in the upper-right corner of the Salesforce UI. The login URL is displayed under your username.

Order on Behalf of a Shopper

Streamline the ordering process by creating orders for shoppers using a sequence of API endpoints. Service agents can now directly place orders for shoppers instead of instructing them to place the order themselves.

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

Easily Pick and Pack Online Orders

Increase productivity with simple steps to handle BOPIS and ship-from-store orders. Use pre-built flows to help your store staff locate new orders, track fulfillment, and complete orders.

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

Ingest B2C Commerce Orders at High Scale

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

SEE ALSO:

Automatically Reroute Rejected Fulfillment Orders with the Distributed Order Management Flows

If you use the Distributed Order Management Routing package, you no longer have to reroute fulfillment orders that have been rejected by fulfillment locations. The flows now do it automatically! And they're smart—they don't reroute in-store pickup (BOPIS) orders, and they don't reroute a fulfillment order to a location that's already rejected it. You can also configure the number of rerouting attempts allowed per fulfillment order. To implement this feature, deploy and configure the latest version of the package.

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

SEE ALSO:

Sequence Payment Methods When Processing a Refund

You now have the flexibility to control the sequence of payment methods used in the refund process. When ensuring a refund, specify an ordered list of order payment summaries and, optionally, corresponding refund amounts. If the list doesn't cover the entire refund amount, you can apply the default logic to ensure the remaining amount or leave that amount on the credit memo to ensure later. You can also implement a wrapper for the Ensure Refunds action or API resource that builds the sequence list according to custom logic. We provide example code that demonstrates how to do so using a custom invocable action.

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

SEE ALSO:

Invocable Actions

Order Management Developer Guide: : Payment Sequencing (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Action for Order Management: Ensure Refunds Async (can be outdated or unavailable during release preview)

Charge Return Fees

Now you can charge a fee when returning an order item. A return fee is represented by a return order line item with the new Type value `Fee`, which is associated with the existing TypeCode value `Charge`. You can charge return fees using the API resources and actions for return orders. Create one or more products to represent return fees. When you create a return order, specify a return fee product and the fee details in the input for an order item that includes a return fee.

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

SEE ALSO:

Salesforce Help: Charge Return Fees (can be outdated or unavailable during release preview)

Invocable Actions

Salesforce Help: Flow Core Action for Order Management: Create Return Order (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Action for Order Management: Return Return Order Items (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Action for Order Management: Create an Invoice from Change Orders (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Action for Order Management: Ensure Refunds Async (can be outdated or unavailable during release preview)

Specify a Reason When Rejecting a Fulfillment Order Line Item

You can assign a reject reason when a fulfillment location rejects a fulfillment order item with the new RejectReason picklist field on the Fulfillment Order Line Item object. Also, the Fulfillment Order object's Status picklist field includes the new value `Rejected`, associated with the new StatusCategory `Rejected`, and the new values `Printed` and `Pick Complete`, both associated with the existing StatusCategory `Fulfilling`. Starting in Winter '23, the Distributed Order Management Routing package uses these elements.

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

SEE ALSO:

Automatically Reroute Rejected Fulfillment Orders with the Distributed Order Management Flows

Configure Delivery and Apply Payment Promotions When Adding an Item to an Existing B2C Commerce Order

You can implement this added functionality because several Commerce WebStore API resources now support B2C Commerce.

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

Why: These API resources now support B2C Commerce.

Change Delivery Address (now returns delivery methods)
```
PATCH
https://host:port/services/data/version/commerce/webstores/WebStoreId/checkouts/CheckoutId
```

Change Delivery Methods
```
PATCH
https://host:port/services/data/version/commerce/webstores/WebStoreId/checkouts/CheckoutId
```

Tokenize Payment
```
POST
https://host:port/services/data/version/commerce/webstores/WebStoreId/payments/token
```

Authorize Payment
```
POST
https://host:port/services/data/version/commerce/webstores/WebStoreId/checkouts/CheckoutId/payments
```

Cart to Order
```
POST
https://host:port/services/data/version/commerce/webstores/WebStoreId/checkouts/CheckoutId/orders
```

SEE ALSO:

Add Item Playbook for Order Management with B2CE Commerce (can be outdated or unavailable during release preview)

Self-Provision the Connection Between B2C Commerce and Order Management

Use the new B2C Commerce Connections page in Salesforce to provision the connection. Use the new Salesforce Order Management Integration Administration page in the B2C Commerce Business Manager to activate the integration.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.
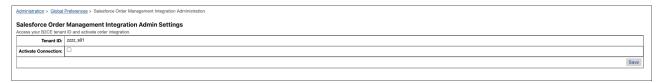
When: The Salesforce Order Management Integration Administration page in Business Manager is available in B2C Commerce version 22.10.

How: Follow the instructions in the Salesforce Order Management Implementation Guide for B2C Commerce.

To open the B2C Commerce Connections page, log in to Salesforce. From Setup, in the Quick Find Box, enter `B2C Commerce`, and then select **B2C Commerce Connections**.

To open the Salesforce Order Management Integration Administration page, log in to the B2C Commerce Business Manager. Navigate to **Administration** > **Global Preferences** > **Salesforce Order Management Configuration**.

You can connect more than one instance of B2C Commerce to your org by repeating the new connection process for each B2C Commerce instance.

SEE ALSO:

    Salesforce Order Management Implementation Guide for Salesforce B2C Commerce (can be outdated or unavailable during release preview)

Efficiently Handle B2C Commerce Orders When Omnichannel Inventory Is Unavailable

The B2C Commerce storefront and Order Management both communicate with Omnichannel Inventory as part of their order placement and routing processes. These processes can handle temporary communication issues via exception checking and retries, but extended disruptions can require more intervention to avoid order failures. With the updated Omnichannel Inventory Downtime Playbook and package, you can implement a more streamlined process that requires less manual intervention.

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

SEE ALSO:

    Omnnichannel Inventory Downtime Playbook (can be outdated or unavailable during release preview)

Find Order Management Implementation Instructions More Easily

The implementation instructions for Salesforce Order Management are reorganized into guides tailored to the product that you used to create your store.

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

How: Order Management has these three implementation guides.

- Salesforce Order Management Implementation Guide for Salesforce B2C Commerce—For implementing Order Management with stores created using Salesforce B2C Commerce.

- Salesforce Order Management Implementation Guide for B2B and B2B2C Commerce —For implementing Order Management with stores created using B2B Commerce. Also use this guide if you've purchased the full Order Management license and have created stores using B2B2C Commerce.

- Salesforce Order Management Implementation Guide for B2B2C—For implementing the limited set of Order Management functionality included with B2B2C Commerce stores.

Activate Enhanced Domains for a B2C Commerce Integration

Enhanced Domains are now required for all non-production Salesforce orgs, including sandboxes. When you turn on Enhanced Domains, the login URL changes. If your org is integrated with a B2C Commerce storefront, open a case with Salesforce Support and provide your new login URL. To find the login URL, click your profile image in the upper-right corner of the Salesforce UI. The login URL is displayed under your username.

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

SEE ALSO:

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

Salesforce Payments

Offer shoppers a smooth and secure checkout experience with Salesforce Payments, available for Salesforce B2C Commerce and as a new application on the Salesforce platform. Simplify integration with Salesforce B2B2C Commerce and Salesforce Order Management, protect against fraud, and access payments reports for data insights.

IN THIS SECTION:

Make Store CheckOut Easy with Salesforce Payments

Give shoppers a checkout experience that's easy, secure, and accepts their preferred payment method with Salesforce Payments, a new offering on the Salesforce platform. Use the built-in reports and charts to examine payment transactions and analyze the financial health of your business.

Provision a Salesforce Payments Account for Payments Features

A Salesforce Payments account represents an underlying provider account at a payment provider or gateway. When you set up Payments, you link a Salesforce payments account (called a Merchant Account in the Payments UI) to a provider account and this linking enables payments features. With the Salesforce Payments account, you can integrate Payments with your Commerce Cloud stores, run reports for Stripe accounts, and enable Salesforce Order Management to capture payments and issue refunds.

Gain Financial Insights from Payment Reports and Charts

Use the Salesforce Payments charts and reports to view payment activity linked to your Stripe merchant account. You can select which charts appear on the Payments App home page and go directly to a report. The reports help you analyze the financial health of your store. Examine payments data in different combinations and formats, and share the resulting insights with others. You can also create custom reports.

Add Credit Card Payments to Your Store with a Few Clicks

Easily add credit card payments to your checkout experience using the client-side payments Lightning web component. This component, included with the Salesforce Payments for Commerce Cloud package, is for stores created using B2B2C. The component enables a direct call from a browser to Stripe to confirm credit card payments. The client-side component also supports 3D Secure authentication.

Make Store CheckOut Easy with Salesforce Payments

Give shoppers a checkout experience that's easy, secure, and accepts their preferred payment method with Salesforce Payments, a new offering on the Salesforce platform. Use the built-in reports and charts to examine payment transactions and analyze the financial health of your business.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to orgs that have purchased Salesforce Payments.

How: From Setup, in the Quick Find box, enter `Payments`. On the Payments page, select **Enable**.

📝 Note: Salesforce Payments for B2C Commerce is also available.

SEE ALSO:

Salesforce Help: Salesforce Payments (can be outdated or unavailable during release preview)
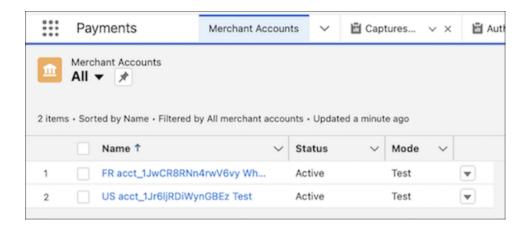
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Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to orgs that have purchased Salesforce Payments.

How: Install the Salesforce Payments Managed Package for Commerce Cloud in the same org with B2B2C Commerce or Salesforce Order Management.

SEE ALSO:

Salesforce Help: Provision a Salesforce Payments Account (can be outdated or unavailable during release preview)
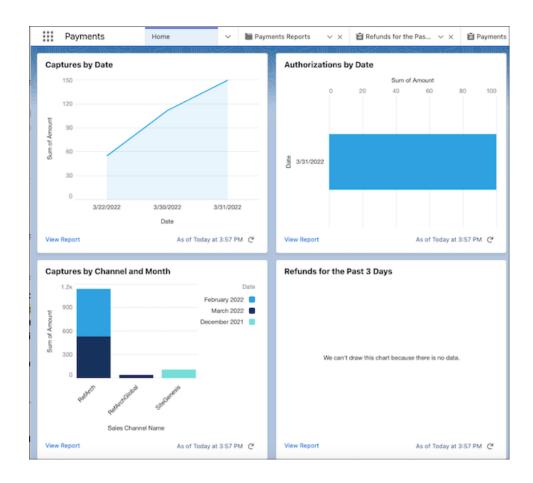
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Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to orgs that have purchased Salesforce Payments.

Why: View payment activity by date, time, and merchant. Examine your store's checkout process by seeing the number of payments declined and authorized.

SEE ALSO:

  Salesforce Help: Payments Reports (can be outdated or unavailable during release preview)
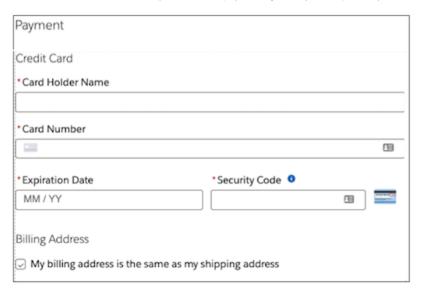
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Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

Who: This feature is available to orgs that have purchased Salesforce Payments.

How: The component is installed when you install the Salesforce Payments for Commerce Cloud package from AppExchange. The B2B2C Commerce built-in functionality links to the payment gateway that updates your store's checkout page to use the new component.

Customer Data Platform (formerly Salesforce CDP)

Customer Data Platform, formerly known as Salesforce CDP, helps you create a single source of truth (SSOT) so you can get to know your customers and engage with relevance. Admins can use the CRM Analytics dashboards to augment your analysis without moving the data from Customer Data Platform.

IN THIS SECTION:

Salesforce CDP Has Been Changed to Customer Data Platform

Salesforce CDP is now called Customer Data Platform. We're in the process of updating the name in the UI, documentation, Trailhead, and more.

Retain Data After Deleting a Data Stream

You can now seamlessly delete an S3 data stream and retain its associated data lake object (DLO) because the data stream and DLO are decoupled. You can also choose to reuse an existing DLO while configuring a new S3 data stream.

Access CRM Analytics with One Click

Explore and analyze your Customer Data Platform data in CRM Analytics with a single click. You can augment your analysis without moving the data from Customer Data Platform. In Customer Data Platform, select a data object, and click the new **Explore in Analytics** button to use the CRM Analytics dashboards.

Identify Skipped Ruleset Jobs

Ruleset jobs that aren't scheduled to run are now tagged with the Skipped status in the ruleset's Processing History tab. The Skipped status applies when a ruleset job isn't scheduled. Ruleset jobs are skipped if there were no changes to data streams or records in the source data model object, and the ruleset's configuration remains unchanged.

Identify Problems with Identity Resolution Rulesets

Ruleset warnings identify specific mappings, rules, or fields to review to improve profile unification consolidation rate and reduce the number of unified profiles counted against your contracted entitlement. For example, reconciliation rules warnings prompt you to select the Source Sequence reconciliation rule as a way to reduce the frequency of value changes in ID fields.

Build and Share

Insight Builder is a business-analyst-focused and user-friendly metrics authoring tool that is used to create an insight. Using the visual builder, you can generate the required data sets similar to the ones generated by using SQL.

Reuse Segments (Beta)

Save time and maintain consistency by building segments from existing segments.

Narrow Segments with Exclusion Criteria (Beta)

Use the new Exclude tab to narrow your audience using exclusion criteria.

Accelerate Data Processing Between Customer Data Platform and Tableau (Pilot)

The new Hyper Query Processing engine performs faster query processing on large and complex datasets. The query engine is native to Customer Data Platform and speeds up interactive analytics when customers query data in Tableau from Customer Data Platform.

Salesforce CDP Has Been Changed to Customer Data Platform

Salesforce CDP is now called Customer Data Platform. We're in the process of updating the name in the UI, documentation, Trailhead, and more.

Retain Data After Deleting a Data Stream

You can now seamlessly delete an S3 data stream and retain its associated data lake object (DLO) because the data stream and DLO are decoupled. You can also choose to reuse an existing DLO while configuring a new S3 data stream.

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

Access CRM Analytics with One Click

Explore and analyze your Customer Data Platform data in CRM Analytics with a single click. You can augment your analysis without moving the data from Customer Data Platform. In Customer Data Platform, select a data object, and click the new **Explore in Analytics** button to use the CRM Analytics dashboards.

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

How: To access CRM Analytics from Customer Data Platform, provide the following licenses in the same Salesforce org.

- CRM Analytics Plus license or CRM Analytics Growth license.

Identify Skipped Ruleset Jobs

Ruleset jobs that aren't scheduled to run are now tagged with the Skipped status in the ruleset's Processing History tab. The Skipped status applies when a ruleset job isn't scheduled. Ruleset jobs are skipped if there were no changes to data streams or records in the source data model object, and the ruleset's configuration remains unchanged.

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

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

Build and Share

Insight Builder is a business-analyst-focused and user-friendly metrics authoring tool that is used to create an insight. Using the visual builder, you can generate the required data sets similar to the ones generated by using SQL.

IN THIS SECTION:

Save a Calculated Insight as a Draft

When creating a calculated insight using Insight Builder or SQL Expression Builder, you can now save the insight as draft and continue to make changes until you publish it.

Edit a Calculated Insight

You no longer need to create a new calculated insight when you want to make changes. Save time and reduce the possibility of errors by now updating the attributes and logic of an existing calculated insight that was created using SQL Expression Builder or Insight Builder.

Clone a Calculated Insight

Quickly create a calculated insight by using the metrics from an existing insight. You can duplicate the SQL function from the calculated insights record in Customer Data Platform and then edit the attributes.

Execute a Calculated Insight Immediately

Now you can prioritize and validate the results of a calculated insight as needed, instead of processing it as a batch schedule and waiting hours for it to execute. You can submit three executions per day per calculated insight and a maximum of 20 executions a day per tenant.

Auto-Populate Join Keys

Now when you join two or more objects in Insight Builder, the join nodes and join keys are auto-populated based on the relationships stored in Customer Data Platform. Auto-populated join nodes make it easy to join engagement data with a Unified Profile and override auto-suggested joins.

Save a Calculated Insight as a Draft

When creating a calculated insight using Insight Builder or SQL Expression Builder, you can now save the insight as draft and continue to make changes until you publish it.

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

How: In Customer Data Platform, click **Calculated Insights**. Create a calculated insight, and then click **Save as Draft**.

Edit a Calculated Insight

You no longer need to create a new calculated insight when you want to make changes. Save time and reduce the possibility of errors by now updating the attributes and logic of an existing calculated insight that was created using SQL Expression Builder or Insight Builder.

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

How: In Customer Data Platform, click **Calculated Insights**. Open your calculated insight, and click **Edit**.

Clone a Calculated Insight

Quickly create a calculated insight by using the metrics from an existing insight. You can duplicate the SQL function from the calculated insights record in Customer Data Platform and then edit the attributes.

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

How: In Customer Data Platform, click **Calculated Insights**. Open your calculated insight, and click **Clone**.

Execute a Calculated Insight Immediately

Now you can prioritize and validate the results of a calculated insight as needed, instead of processing it as a batch schedule and waiting hours for it to execute. You can submit three executions per day per calculated insight and a maximum of 20 executions a day per tenant.

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

How: In Customer Data Platform, click **Calculated Insights**. Open your calculated insight, and click **Publish Now**.

Auto-Populate Join Keys

Now when you join two or more objects in Insight Builder, the join nodes and join keys are auto-populated based on the relationships stored in Customer Data Platform. Auto-populated join nodes make it easy to join engagement data with a Unified Profile and override auto-suggested joins.

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

Reuse Segments (Beta)

Save time and maintain consistency by building segments from existing segments.

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

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

Narrow Segments with Exclusion Criteria (Beta)

Use the new Exclude tab to narrow your audience using exclusion criteria.

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

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

Accelerate Data Processing Between Customer Data Platform and Tableau (Pilot)

The new Hyper Query Processing engine performs faster query processing on large and complex datasets. The query engine is native to Customer Data Platform and speeds up interactive analytics when customers query data in Tableau from Customer Data Platform.

Where: This change impacts Salesforce CDP Connector in Tableau.

> **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. This feature can be subject to future pricing considerations when it becomes generally available.

How: To enable this feature, contact Salesforce Support.

Customization

Make your account, contact, and opportunity Lightning pages more robust and flexible with Dynamic Forms. Use the Salesforce Connect adapter for Amazon Athena, now generally available, to access Athena's capability to run queries against data directly in Amazon S3. Improve address data accuracy and provide a better user experience with Custom Address Fields, now generally available.

IN THIS SECTION:

Lightning App Builder

Create more flexible Lightning record pages with Dynamic Forms, now available for select Salesforce objects. Filter by multiple picklist values to see the most relevant records in dynamic related lists.

Salesforce Connect

Connect Salesforce to access Amazon Athena's interactive query capabilities and integrate AWS data natively with Salesforce. Improve sorting options for data sets in Salesforce through secondary indexes defined on an Amazon DynamoDB table. Monitor connection performance for Salesforce Connect adapters for AWS.

Fields

Create custom fields that mimic the behavior of standard address fields. Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Bulk delete all the inactive values for a picklist field. Save more time managing your picklists with the ability to delete, activate, deactivate, or replace multiple custom picklist field values at once in sandboxes and in production.

Globalization

Stay up to date with the latest locale formats and time zones. Prepare for a new style for Japanese katakana. And the new leone is available as a currency.

Permissions

A setting for creating permission set and permission set group assignments with expiration dates is available via an enforced release update. Convert profiles to permission set groups with the User Access and Permissions Assistant. Also, analyze and report on permission assignments and easily manage your permission set groups.

Sharing

Enhanced Personal Information Management is enforced, replacing Hide Personal Information in User Management Settings. Use scoping rules so that your users can focus on the records that are relevant to them. Give your users access to records via scoping or restriction rules by using comma-separated values in the rule's record criteria.

External Services

Build External Services integrations more seamlessly with additional registration options, improved schema validation, and the ability to view auto-generated Apex classes.

Data Loader

Find your Data Loader Release Notes and installer files at Salesforce.com.

Einstein Prediction Builder

Build effective custom AI predictions by using the Einstein Prediction Builder Learning Map. This one-stop solution shows you how to build, from exploration to troubleshooting. Get valuable insights to drive predictive intelligence for your business.

AppExchange

Find relevant AppExchange solutions faster with new filtering options and search enhancements. Spend less time evaluating apps with the streamlined listing experience.

General Setup

Create Lightning apps in a flash by cloning existing custom apps (beta).

Lightning App Builder

Create more flexible Lightning record pages with Dynamic Forms, now available for select Salesforce objects. Filter by multiple picklist values to see the most relevant records in dynamic related lists.

IN THIS SECTION:

Enhance More Object Record Pages With Dynamic Forms

You can make your account, including person account, contact, and opportunity record pages more robust by configuring them with Dynamic Forms.

New Default Behavior When Migrating a Record to Dynamic Forms

When you migrate a Record Detail to Dynamic Forms, the option **Migrate fields and sections into an Accordion component to improve page performance** is no longer selected by default.

Do More with Dynamic Related List Filters

Now when you filter dynamic related lists in the Lightning App Builder, you can select multiple filter values for picklist fields. For example, on the Contact record page, filter a dynamic related list to show all cases with a priority of Medium or High. Previously, you could filter by only one picklist value.

Enhance More Object Record Pages With Dynamic Forms

You can make your account, including person account, contact, and opportunity record pages more robust by configuring them with Dynamic Forms.

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

How: In the Lightning App Builder, open an account, including person account, contact, or opportunity record page. Click the new Fields tab, and place fields anywhere on the page. Or automate the process by migrating your Record Detail component to use Dynamic Forms with the click of a button.

SEE ALSO:

Salesforce Help: Break Up Your Record Details with Dynamic Forms (can be outdated or unavailable during release preview)

New Default Behavior When Migrating a Record to Dynamic Forms

When you migrate a Record Detail to Dynamic Forms, the option **Migrate fields and sections into an Accordion component to improve page performance** is no longer selected by default.

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

Do More with Dynamic Related List Filters

Now when you filter dynamic related lists in the Lightning App Builder, you can select multiple filter values for picklist fields. For example, on the Contact record page, filter a dynamic related list to show all cases with a priority of Medium or High. Previously, you could filter by only one picklist value.

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)

Salesforce Connect

Connect Salesforce to access Amazon Athena's interactive query capabilities and integrate AWS data natively with Salesforce. Improve sorting options for data sets in Salesforce through secondary indexes defined on an Amazon DynamoDB table. Monitor connection performance for Salesforce Connect adapters for AWS.

IN THIS SECTION:

Connect Securely to Amazon Athena and Perform Interactive Queries from Salesforce (Generally Available)

Use the Salesforce Connect adapter for Amazon Athena to integrate AWS data natively with Salesforce and to run interactive ad hoc queries. The new adapter takes advantage of Amazon Athena's capability to run queries against data directly in Amazon Simple Storage Service (S3), without managing RDBMS infrastructure or ETL tools.

Support Efficient Access to Sorted Data Sets with Secondary Indexes

The Salesforce Connect Adapter for Amazon DynamoDB supports data sorting by one or more secondary indexes created on an Amazon DynamoDB table. Salesforce Connect now uses global and local secondary indexes defined on a table in Amazon DynamoDB to sort data sets viewed in related lists, list views, SOQL queries, and more. Previously, sorting was only supported on the table's sort key.

Perform Async DML Operations for Cross-Org Adapter with Corrected External Object IDs

When you initiate asynchronous DML operations on external objects with the cross-org adapter, the correct record IDs are passed to the job placed in the background jobs queue. The record IDs of external objects with the cross-org adapter are now assigned the correct key prefix x00. Previously, the record IDs began with an incorrect key prefix 001.

Connect Securely to Amazon Athena and Perform Interactive Queries from Salesforce (Generally Available)

Use the Salesforce Connect adapter for Amazon Athena to integrate AWS data natively with Salesforce and to run interactive ad hoc queries. The new adapter takes advantage of Amazon Athena's capability to run queries against data directly in Amazon Simple Storage Service (S3), without managing RDBMS infrastructure or ETL tools.

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

Why: Get query results fast even when you perform complex queries on large datasets. Use the Salesforce Connect adapter for Amazon Athena to:

- View data with record pages, related lists, and list views.
- Define object relationships between external records and natively stored Salesforce records.
- Use Reports and Dashboards with external objects exposed by Athena.
- Access Amazon S3 data via Athena programmatically through SOQL and Apex (without DML).

How: Define an external data source of type Amazon Athena and connect Salesforce to access Amazon Athena's capability to analyze structured data in a variety of formats and data stores. The adapter only supports read operations on the queried data.

SEE ALSO:

Salesforce Help: Access External Data with the Salesforce Connect Adapter for Amazon Athena (can be outdated or unavailable during release preview)

Support Efficient Access to Sorted Data Sets with Secondary Indexes

The Salesforce Connect Adapter for Amazon DynamoDB supports data sorting by one or more secondary indexes created on an Amazon DynamoDB table. Salesforce Connect now uses global and local secondary indexes defined on a table in Amazon DynamoDB to sort data sets viewed in related lists, list views, SOQL queries, and more. Previously, sorting was only supported on the table's sort key.

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

How: To determine the type of secondary indexes to use, either global or local, work with your AWS administrator who has Amazon DynamoDB expertise. As a best practice, we recommend that you analyze your application's requirements before using secondary indexes. Also make sure that you consider the cost ramifications.

SEE ALSO:

Amazon DynamoDB Developer Guide: Improving data access with secondary indexes

Perform Async DML Operations for Cross-Org Adapter with Corrected External Object IDs

When you initiate asynchronous DML operations on external objects with the cross-org adapter, the correct record IDs are passed to the job placed in the background jobs queue. The record IDs of external objects with the cross-org adapter are now assigned the correct key prefix x00. Previously, the record IDs began with an incorrect key prefix 001.

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

Fields

Create custom fields that mimic the behavior of standard address fields. Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. Bulk delete all the inactive values for a picklist field. Save more time managing your picklists with the ability to delete, activate, deactivate, or replace multiple custom picklist field values at once in sandboxes and in production.

IN THIS SECTION:

Deliver to Your Customers with Custom Address Fields (Generally Available)

Improve address data accuracy and your users' experience with Custom Address Fields. For example, add a Warehouse Address field to a standard or custom object. Your users can enter a custom address, 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. This feature, now generally available, includes some changes since the last release.

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 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. This feature is available in production and in sandbox orgs.

Deliver to Your Customers with Custom Address Fields (Generally Available)

Improve address data accuracy and your users' experience with Custom Address Fields. For example, add a Warehouse Address field to a standard or custom object. Your users can enter a custom address, 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. This feature, now generally available, includes some changes since the last release.

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

Why: There are several changes in this release. Custom address fields are now supported for dynamic forms for Flows. If the end user's personal language is a fully supported or end-user language in Salesforce, the labels for the components of a custom address now appear in that language. You can add a state in the State and Country picklist with a name and code that match the name and code of an existing state in another country. And the documentation now clarifies expected behavior for address fields around marking fields as required and load times.

The beta process uncovered some new limitations. Custom address fields aren't supported for Lead Conversion, Approval Process, or the address component of Flows. And Salesforce hasn't validated custom address fields in Community Profile or Data Export.

How: Before you enable custom address fields, review Custom Address Fields 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 (can be outdated or unavailable during release preview)

Salesforce Help: Custom Address Fields Developer Guide (can be outdated or unavailable during release preview)

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

Clean Up Inactive Picklist Values (Beta)
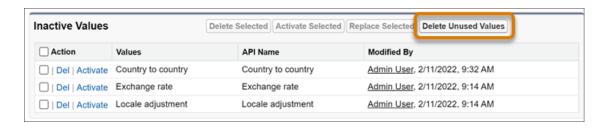
Manage your inactive picklist values and enforce limits on inactive values for custom picklists to improve system performance and overall health. You can now bulk delete inactive unused picklist values. Previously, custom picklists with many inactive values were difficult to maintain because you deleted 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

☐ Action	Values	API Name	Modified By
☐ | Del | Activate	Country to country	Country to country	Admin User, 2/11/2022, 9:32 AM
☐ | Del | Activate	Exchange rate	Exchange rate	Admin User, 2/11/2022, 9:14 AM
☐ | Del | Activate	Locale adjustment	Locale adjustment	Admin User, 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)
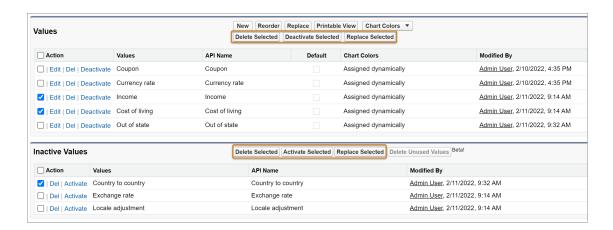
Save time managing your picklists. You can now delete, activate, deactivate, or replace multiple custom picklist field values at once. Previously, you modified them one at a time. This feature is available in production and in sandbox orgs.

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 Advanced Picklist Values Management (beta) from the Picklist Settings page. Then navigate to the custom field definition page. The Values and Inactive Values sections show 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					New	Reorder	Replace	Printable View	Chart Colors ▼
					Delete Selected	Deactivate Selected	Replace Selected		

☐ Action	Values	API Name	Default	Chart Colors	Modified By
☐	Edit | Del | Deactivate Coupon	Coupon	☐	Assigned dynamically	Admin User, 2/10/2022, 4:35 PM
☐	Edit | Del | Deactivate Currency rate	Currency rate	☐	Assigned dynamically	Admin User, 2/10/2022, 4:35 PM
☑	Edit | Del | Deactivate Income	Income	☐	Assigned dynamically	Admin User, 2/11/2022, 9:14 AM
☑	Edit | Del | Deactivate Cost of living	Cost of living	☐	Assigned dynamically	Admin User, 2/11/2022, 9:14 AM
☐	Edit | Del | Deactivate Out of state	Out of state	☐	Assigned dynamically	Admin User, 2/11/2022, 9:32 AM

Inactive Values			Delete Selected	Activate Selected	Replace Selected	Delete Unused Values Beta!

☐ Action	Values	API Name	Modified By
☑	Del | Activate Country to country	Country to country	Admin User, 2/11/2022, 9:32 AM
☐	Del | Activate Exchange rate	Exchange rate	Admin User, 2/11/2022, 9:14 AM
☐	Del | Activate Locale adjustment	Locale adjustment	Admin User, 2/11/2022, 9:14 AM

SEE ALSO:

  Salesforce Help: Delete, Deactivate, Replace, or Activate Multiple Picklist Values (can be outdated or unavailable during release preview)

Globalization

Stay up to date with the latest locale formats and time zones. Prepare for a new style for Japanese katakana. And the new leone is available as a currency.

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.

Prepare for Locale Format Changes

Stay up to date with the latest locale formats from International Components for Unicode (ICU) and Oracle's Java Development Kit (JDK). Whether you use the ICU or the JDK format, we recommend that you evaluate how the changes affect you. This release includes ICU 71.1, which uses Common Locale Data Repository (CLDR) version 41, and JDK version 11, which uses CDLR version 33.

Review Updated Time Zones

Keep up to date with renamed time zones. Apia Daylight Time (GMT+14:00) is no longer observed, and four time zones are renamed.

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Chinese (Simplified), Finnish, French, Italian, Japanese, Korean, Portuguese (Brazil), Spanish, Spanish (Mexico), and Romanian.

Prepare for the Japanese Katakana Style Change

To improve the Japanese katakana translation for foreign language words, we plan to replace the current Japanese Industrial Standards (JIS) style with the 1991 Cabinet Notification Directive style in Winter '24.

Conduct Business with the New Leone

To help support your customers in Sierra Leone, the new leone (SLE) currency is available in Salesforce.

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 '24. 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

Prepare for Locale Format Changes

Stay up to date with the latest locale formats from International Components for Unicode (ICU) and Oracle's Java Development Kit (JDK). Whether you use the ICU or the JDK format, we recommend that you evaluate how the changes affect you. This release includes ICU 71.1, which uses Common Locale Data Repository (CLDR) version 41, and JDK version 11, which uses CDLR version 33.

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

How: Review the changes to date, time, name, and currency formats for the locales that you use in Salesforce and evaluate how they affect you. Then test your filters, code, and components as needed.

SEE ALSO:

> *Knowledge Article*: International Components for Unicode (ICU) Locale Format Changes in Winter '23
>
> *Knowledge Article*: Java Development Kit (JDK) Locale Format Changes in Winter '23
>
> *Salesforce Help*: Determine Whether Your Org Uses ICU or JDK Locale Formats
>
> *Salesforce Help*: Locales Overview (can be outdated or unavailable during release preview)

Review Updated Time Zones

Keep up to date with renamed time zones. Apia Daylight Time (GMT+14:00) is no longer observed, and four time zones are renamed.

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

Why: The Apia Daylight Time (Pacific/Apia) is removed. The name for these time zones changed.

TIME ZONE CODE	CURRENT NAME	NEW NAME
GMT-02:00	St. Pierre & Miquelon Daylight Time (America/Miquelon)	St Pierre & Miquelon Daylight Time (America/Miquelon)
GMT-03:00	St. Pierre & Miquelon Standard Time (America/Miquelon)	St Pierre & Miquelon Standard Time (America/Miquelon)
GMT-07:00	Mountain Standard Time (America/Dawson)	Yukon Time (America/Dawson)
GMT-07:00	Mountain Standard Time (America/Whitehorse)	Yukon Time (America/Whitehorse)

SEE ALSO:

> *Salesforce Help*: Supported Time Zones (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 for these languages: Chinese (Simplified), Finnish, French, Italian, Japanese, Korean, Portuguese (Brazil), Spanish, Spanish (Mexico), and Romanian.

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

How: To review the changes, see Winter '23 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 Labels (can be outdated or unavailable during release preview)

Prepare for the Japanese Katakana Style Change

To improve the Japanese katakana translation for foreign language words, we plan to replace the current Japanese Industrial Standards (JIS) style with the 1991 Cabinet Notification Directive style in Winter '24.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions. Product documentation gets updated to use the new style starting in Winter '24.

> **Note:** The feature described here doesn't become generally available until the latest general availability date that Salesforce announces. Before then, we can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

SEE ALSO:

Knowledge Article: 日本語(カタカナ)の表示ラベル変更 (Japanese Only)

Conduct Business with the New Leone

To help support your customers in Sierra Leone, the new leone (SLE) currency is available in Salesforce.

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

SEE ALSO:

Salesforce Help: Select Your Language, Locale, and Currency (can be outdated or unavailable during release preview)

Salesforce Help: Supported Currencies (ICU) (can be outdated or unavailable during release preview)

Salesforce Help: Supported Currencies (JDK) (can be outdated or unavailable during release preview)

Permissions

A setting for creating permission set and permission set group assignments with expiration dates is available via an enforced release update. Convert profiles to permission set groups with the User Access and Permissions Assistant. Also, analyze and report on permission assignments and easily manage your permission set groups.

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 and is enforced in Winter '23.

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.

Set Field-Level Security for a Field on Permission Sets Instead of Profiles During Field Creation (Beta)

Now when you create a field on an object, you can follow best practices and set field-level security for a field on permission sets instead of profiles. And rather than manually granting access to a field in each permission set, you can set field-level security on permission sets during field creation. This feature is also available when you set field-level security on a field or change the field type on a field.

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 and is enforced in Winter '23.

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:

Salesforce Help: Permission Set and Permission Set Group Assignment Expiration (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)

Set Field-Level Security for a Field on Permission Sets Instead of Profiles During Field Creation (Beta)

Now when you create a field on an object, you can follow best practices and set field-level security for a field on permission sets instead of profiles. And rather than manually granting access to a field in each permission set, you can set field-level security on permission sets during field creation. This feature is also available when you set field-level security on a field or change the field type on a field.

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: Enable **Field-Level Security for Permission Sets During Field Creation (beta)** in User Management Settings. Then create an object, set field-level security on a field, or change the field type on a field. When you can assign field-level security, a list of permission sets appears instead of profiles. The list includes permission sets that have Create, Read, Edit, or Delete access on the field's object. If no permission sets have that access on the field's object, the list contains all the permission sets. If you must assign field-level security to profiles, turn off **Field-Level Security for Permission Sets During Field Creation (beta)** in User Management Settings. View Field Accessibility isn't currently updated by this feature.

SEE ALSO:

> *Salesforce Help*: Create Custom Fields (can be outdated or unavailable during release preview)

Sharing

Enhanced Personal Information Management is enforced, replacing Hide Personal Information in User Management Settings. Use scoping rules so that your users can focus on the records that are relevant to them. Give your users access to records via scoping or restriction rules by using comma-separated values in the rule's record criteria.

IN THIS SECTION:

Enable Stronger Protection for Your Users' Personal Information (Release Update)

Enable Enhanced Personal Information Management to prevent external users, such as portal or community users, from accessing other users' personal information. This feature, which replaces the Hide Personal Information setting, secures more personal identifiable information (PII) user record fields. You can also decide which custom and standard user fields are considered PII. This update was first available in Spring '22 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23.

Try Scoping Rules in Performance and Unlimited Editions

Now you can use scoping rules on supported objects without contacting Salesforce.

Allow Multiple Values in Restriction or Scoping Rule Record Criteria

Configure a restriction or scoping rule to use a comma-separated list of IDs or values in the record criteria.

Discover the 45 New Objects Related to Sharing and Sharing Hierarchy Actions

Sharing and Sharing Hierarchy Help documentation now includes the full list of supported objects so you can easily determine whether a specific object is supported.

Scoping Rules Apply Only to SOQL, Reports, and List Views

Instead of seeing scoped results in searches, lookups, activity timeline, and SOSL, now your users must apply scoping rules to filter records in reports, list views, and SOQL.

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 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23.

Where: This change applies to Salesforce Classic (not available in all orgs) and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

When: This update was first available in Spring '22 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date 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: 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

Try Scoping Rules in Performance and Unlimited Editions

Now you can use scoping rules on supported objects without contacting Salesforce.

Where: This change applies to Lightning Experience in Performance, Unlimited, and Developer editions. Scoping rules are included in Developer editions created after April 2022.

Who: Beginning in Winter '23, admins can use scoping rules on supported objects without Signature Success or Program Architect.

How: To create a scoping rule, navigate to Object Manager in Setup. Select a supported standard or custom object that you want to add a scoping rule for. Click **Scoping Rules**. You can also create and modify scoping rules using Tooling or Metadata API.

SEE ALSO:

> *Salesforce Help*: Scoping Rules (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Create a Scoping Rule (can be outdated or unavailable during release preview)
>
> *Developer Guide*: Scoping Rules Developer Guide (can be outdated or unavailable during release preview)

Allow Multiple Values in Restriction or Scoping Rule Record Criteria

Configure a restriction or scoping rule to use a comma-separated list of IDs or values in the record criteria.

Where: Restriction rules are available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Scoping rules are available in Lightning Experience in Performance, Unlimited, and Developer editions.

How: To create a restriction or scoping rule using more than one value in the record criteria, add a comma as a delimiter to separate the ID or string values. To include a single value that contains a comma, surround the value with double quotes (").

🛑 **Important:** If an existing rule uses commas in record criteria, add double quotes around the value that includes a comma to ensure that the rule works as intended.

SEE ALSO:

    Developer Guide: Restriction Rules Developer Guide (can be outdated or unavailable during release preview)

    Salesforce Help: Create a Restriction Rule (can be outdated or unavailable during release preview)

    Developer Guide: Scoping Rules Developer Guide (can be outdated or unavailable during release preview)

    Salesforce Help: Create a Scoping Rule (can be outdated or unavailable during release preview)

Discover the 45 New Objects Related to Sharing and Sharing Hierarchy Actions

Sharing and Sharing Hierarchy Help documentation now includes the full list of supported objects so you can easily determine whether a specific object is supported.

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

How: In Lightning Experience, both sharing and the Sharing Hierarchy action are available for custom objects and these standard objects.

- Account
- Action Plan
- Action Plan Template
- Appointment Invitation
- Appointment Bundle Configuration
- Appointment Bundle Policy Service Territories
- Asset
- Campaign
- Case
- Contact
- Engagement Interaction
- Expense
- Expense Report
- Job Profile
- Lead
- Maintenance Plan
- Maintenance Work Rule
- Opportunity
- Product Item
- Product Request
- Product Service Campaign
- Product Transfer
- Recordset Filter Criteria
- Return Order
- Serialized Product

- Service Appointment
- Service Contract
- Service Crew
- Service Resource
- Service Territory
- Shift
- Shift Pattern
- Survey
- Survey Invitation
- Time Sheet
- Travel Mode
- Video Call
- Warranty Term
- Work Order
- Work Plan
- Work Plan Selection Rule
- Work Plan Template
- Work Step Template
- Work Type
- Work Type Group

SEE ALSO:

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

Salesforce Help: Viewing Which Users Have Access to Your Records in Lightning Experience (can be outdated or unavailable during release preview)

Scoping Rules Apply Only to SOQL, Reports, and List Views

Instead of seeing scoped results in searches, lookups, activity timeline, and SOSL, now your users must apply scoping rules to filter records in reports, list views, and SOQL.

Where: This change applies to Lightning Experience in Performance, Unlimited, and Developer editions. Scoping rules are included in Developer editions created after April 2022.

How: Create, edit, or delete scoping rules using the Tooling or Metadata API, or in Salesforce Setup. To apply scope that a scoping rule specifies in SOQL, add `USING SCOPE scopingRule`.

SEE ALSO:

Salesforce Help: Create a Scoping Rule (can be outdated or unavailable during release preview)

Developer Guide: Scoping Rules Developer Guide (can be outdated or unavailable during release preview)

External Services

Build External Services integrations more seamlessly with additional registration options, improved schema validation, and the ability to view auto-generated Apex classes.

IN THIS SECTION:

Submit Your API Spec with Two New Registration Options

The two new options are to drag a spec file or to provide an absolute URL to the schema.

Validate Your Schema During Registration

External Services automatically validates the schema and provides detailed messages for any errors at registration time.

Invoke External Services Registered Actions From Omnistudio Assets

You can directly invoke External Services registered actions from OmniStudio Integration Procedures in OmniScripts and FlexCards.

View an Action's Unique Apex Name

Mapping External Services actions in Apex or Flow to specific actions in an External Service registration is now much easier. An object's unique Apex class name is specified in View Actions > More Details. This name also appears when searching for actions in Flow Builder.

View Apex Names in Apex Class Viewer

Now you can view all External Services auto-generated Apex classes in the Apex Class viewer in Setup.

Import MuleSoft Anypoint APIs from Child Business Groups

Create external services for all APIs in your MuleSoft Anypoint Platform organization's business group hierarchy, including APIs that are in child business groups. Previously, you could only import APIs into External Services from your MuleSoft Anypoint Platform organization's top-level business group. APIs in child business groups were not available to import.

Use External Services for MuleSoft RPA to Generate Actions (Generally Available)

Convert MuleSoft RPA (Robotic Process Automation) processes into invocable actions in a few clicks with External Services. Select your MuleSoft named credentials, and Salesforce automatically gets the list of endpoints available to your MuleSoft account across all your environments, and generates the endpoints you selected into invocable actions.

Submit Your API Spec with Two New Registration Options

The two new options are to drag a spec file or to provide an absolute URL to the schema.

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

Why: Here are four options to upload your API spec for registration.

- Provide the relative URL to the schema.
- Provide the full, absolute URL to the schema.
- Copy and paste the JSON-formatted schema into your browser.
- Drag a spec file or browse to upload a local JSON-formatted spec file.

To use the absolute URL option, first add the domain to Remote Site Settings in Setup. The absolute URL can point to a different domain than the one specified for the same external service in Named Credentials.

SEE ALSO:

Salesforce Help: Register an External Service (can be outdated or unavailable during release preview)

Validate Your Schema During Registration

External Services automatically validates the schema and provides detailed messages for any errors at registration time.

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

Why: If one or more errors are found during the validation process, a message or series of messages gives details about the type and location of the errors. You make corrections to the schema by editing it directly with the inline text editor or by modifying an offline copy and re-registering it. There are two types of messages.

- Syntax or logical errors. Must be fixed to complete the registration process. To resolve an error, use the error message to discover the type and location of the error. Make corrections, and click **Validate**. Syntax error messages provide line and column number location.

- Syntax or logical warnings. It's not necessary to fix warnings to complete a registration. But the respective schema components are ignored by the External Services and aren't registered. To fix warnings, use the guidance in the warning message, make corrections, and click **Validate**.

SEE ALSO:

Salesforce Help: Register an External Service (can be outdated or unavailable during release preview)

Invoke External Services Registered Actions From Omnistudio Assets

You can directly invoke External Services registered actions from OmniStudio Integration Procedures in OmniScripts and FlexCards.

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

SEE ALSO:

Trailhead: OmniStudio Integration Procedures

View an Action's Unique Apex Name

Mapping External Services actions in Apex or Flow to specific actions in an External Service registration is now much easier. An object's unique Apex class name is specified in View Actions > More Details. This name also appears when searching for actions in Flow Builder.

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

SEE ALSO:

Salesforce Help: View an Action's Unique Apex Name (can be outdated or unavailable during release preview)

Salesforce Help: View an Action's Unique Apex Name in Flow (can be outdated or unavailable during release preview)

View Apex Names in Apex Class Viewer

Now you can view all External Services auto-generated Apex classes in the Apex Class viewer in Setup.

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

SEE ALSO:

Salesforce Help: View Apex Names in Apex Class Viewer (can be outdated or unavailable during release preview)

Import MuleSoft Anypoint APIs from Child Business Groups

Create external services for all APIs in your MuleSoft Anypoint Platform organization's business group hierarchy, including APIs that are in child business groups. Previously, you could only import APIs into External Services from your MuleSoft Anypoint Platform organization's top-level business group. APIs in child business groups were not available to import.

In the Mulesoft Anypoint Platform, business groups provide a way to separate and control access to resources.

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

Who: To use External Services for MuleSoft, you need a valid MuleSoft license or demo account.

SEE ALSO:

Salesforce Help: MuleSoft API Service Registration (can be outdated or unavailable during release preview)

Use External Services for MuleSoft RPA to Generate Actions (Generally Available)

Convert MuleSoft RPA (Robotic Process Automation) processes into invocable actions in a few clicks with External Services. Select your MuleSoft named credentials, and Salesforce automatically gets the list of endpoints available to your MuleSoft account across all your environments, and generates the endpoints you selected into invocable actions.

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

Who: To use External Services for MuleSoft, you need a valid MuleSoft license or demo account.

SEE ALSO:

Salesforce Help: MuleSoft API Service Registration (can be outdated or unavailable during release preview)

Data Loader

Find your Data Loader Release Notes and installer files at Salesforce.com.

IN THIS SECTION:

Download Data Loader v56 Installer Files From a New Location

Download Data Loader from https://developer.salesforce.com/tools/data-loader. Previously, the Data Loader installers for Windows and macOS were hosted within Setup and also available on GitHub.

Revert Data Loader Settings to Disable OAuth Login from Browser

As of Data Loader v.56, Enable OAuth login from browser is enabled by default. Previously, it was disabled by default in Data Loader Settings.

Download Data Loader v56 Installer Files From a New Location

Download Data Loader from https://developer.salesforce.com/tools/data-loader. Previously, the Data Loader installers for Windows and macOS were hosted within Setup and also available on GitHub.

Why: Salesforce developer tools, including the Data Loader installation files, are now available from the Tools section of the Salesforce Developers website.

SEE ALSO:

Salesforce Help: Data Loader Guide (can be outdated or unavailable during release preview)

Revert Data Loader Settings to Disable OAuth Login from Browser

As of Data Loader v.56, Enable OAuth login from browser is enabled by default. Previously, it was disabled by default in Data Loader Settings.

How: Use these instructions to revert this setting to the v.55 behavior.

1. Open Data Loader.

2. Click **Settings**, and select **Settings** from the dropdown menu.

3. Deselect the checkbox next to **Enable OAuth login from browser**.

4. Click **OK**.

SEE ALSO:

Salesforce Help: Data Loader Guide (can be outdated or unavailable during release preview)

Einstein Prediction Builder

Build effective custom AI predictions by using the Einstein Prediction Builder Learning Map. This one-stop solution shows you how to build, from exploration to troubleshooting. Get valuable insights to drive predictive intelligence for your business.

IN THIS SECTION:

Start Building with the Einstein Prediction Builder Learning Map

Get curated resources at your fingertips with the Einstein Prediction Builder Learning Map. Quickly access content to build predictive capabilities for intelligent decision-making. The learning map guides you through discovery, planning, building, customizing, and troubleshooting predictions using Einstein Prediction Builder.

SEE ALSO:
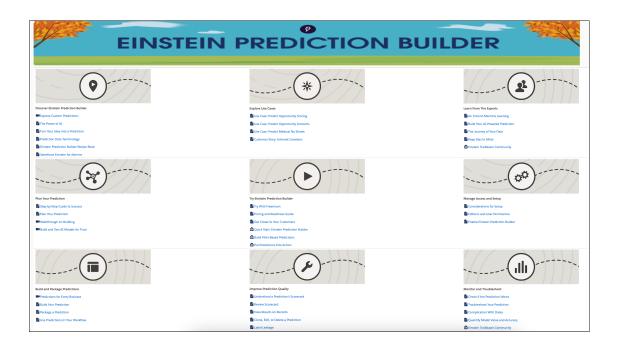
Einstein Release Notes

Start Building with the Einstein Prediction Builder Learning Map

Get curated resources at your fingertips with the Einstein Prediction Builder Learning Map. Quickly access content to build predictive capabilities for intelligent decision-making. The learning map guides you through discovery, planning, building, customizing, and troubleshooting predictions using Einstein Prediction Builder.

How: Access the learning map in Salesforce Help to find relevant topics, blog articles, AI use cases, videos, and more so you can craft winning solutions for your customers.

SEE ALSO:

Einstein Prediction Builder Learning Map

AppExchange

Find relevant AppExchange solutions faster with new filtering options and search enhancements. Spend less time evaluating apps with the streamlined listing experience.

IN THIS SECTION:

Discover Relevant AppExchange Solutions and Consultants Faster

Zero in on the app, solution, or consultant that best fits your business requirements with the improved AppExchange search experience. Access popular filters quickly in the reorganized filter panel. Refine search results more accurately with new filtering and sorting options. App and consultant search results now appear on unique pages, so you can explore with fewer distractions.

Evaluate AppExchange Solutions More Efficiently
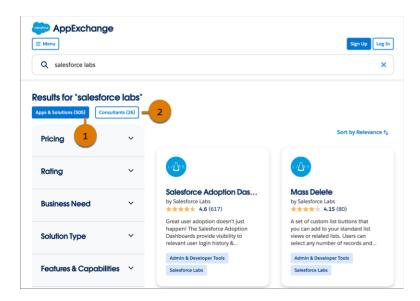
Quickly assess whether an app or other solution meets your company's needs in the streamlined AppExchange listing experience. See pricing details, compatibility info, and average rating at a glance in the simplified Overview tab. If a solution looks promising, take your analysis further by exploring customer feedback on the Reviews tab and technical info on the More Details tab. Behind-the-scenes improvements make the browsing experience snappier, so you spend less time waiting for things to load.

Discover Relevant AppExchange Solutions and Consultants Faster
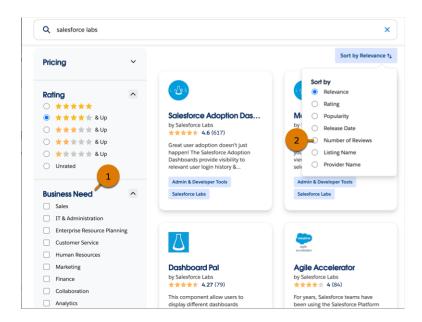
Zero in on the app, solution, or consultant that best fits your business requirements with the improved AppExchange search experience. Access popular filters quickly in the reorganized filter panel. Refine search results more accurately with new filtering and sorting options. App and consultant search results now appear on unique pages, so you can explore with fewer distractions.

Where: This change applies to the AppExchange website.

How: From the AppExchange website, enter your search terms.

By default, you now see the apps and solutions that best match your search term (1). To see results for experts who can help with projects, click **Consultants** (2).
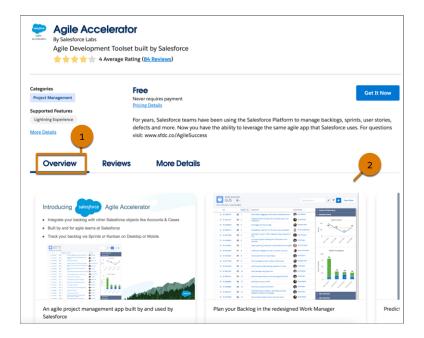
Then, narrow the focus by filtering and sorting. The most popular filters, such as pricing and rating, now appear at the top of the panel. For app and solution results, find matches for common enterprise use cases with new business need filters (1). You can also sort results based on the number of customer reviews they've received (2).

Evaluate AppExchange Solutions More Efficiently
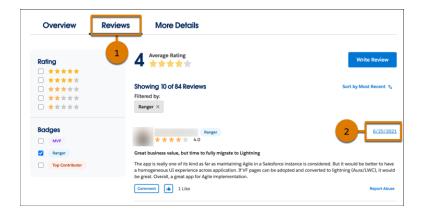
Quickly assess whether an app or other solution meets your company's needs in the streamlined AppExchange listing experience. See pricing details, compatibility info, and average rating at a glance in the simplified Overview tab. If a solution looks promising, take your analysis further by exploring customer feedback on the Reviews tab and technical info on the More Details tab. Behind-the-scenes improvements make the browsing experience snappier, so you spend less time waiting for things to load.

Where: This change applies to app and solution listings on the AppExchange website.
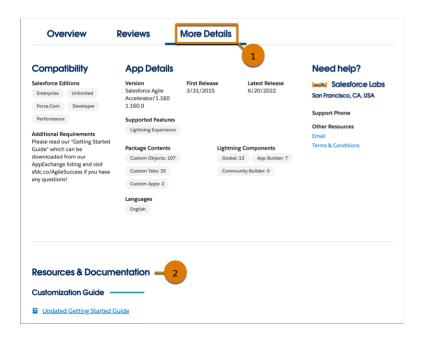
How: From the AppExchange website, open an app or solution listing.

To see the details that are most important in assessing an app or solution, such as the features that it supports, click **Overview** (1). Get a feel for the solution in the updated media carousel (2). In the Pricing Details section, you find a clear overview of the available pricing plans.

To browse feedback from customers who tried the app or solution, click **Reviews** (1). For any review, click the date that it was posted to switch to a view that's easy to share with colleagues and stakeholders (2). To share the review, copy the URL.

To learn about the app or solution's technical attributes, such as the Salesforce editions that it's compatible with, click **More Details** (1). When you're ready for implementation, consult resources and documentation from the provider (2).

General Setup

Create Lightning apps in a flash by cloning existing custom apps (beta).

IN THIS SECTION:

Clone Lightning Apps (Beta)
The Clone (beta) action menu option in the App Manager lets you quickly create a custom Lightning app based on an existing custom app.

Clone Lightning Apps (Beta)

The Clone (beta) action menu option in the App Manager lets you quickly create a custom Lightning app based on an existing custom app.

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.

This beta feature is available only for custom Lightning apps. It isn't available for standard, connected, managed, community or classic apps. Cloning of a utility bar isn't supported in this beta release.

Deployment

Send customizations from one org to another by adding these components to change sets.

IN THIS SECTION:

New and Changed Components for Change Sets

The components available for a change set vary by edition.

New and Changed Components for Change Sets

The components available for a change set vary by edition.

Digital Experience

Represents individual content items in an enhanced LWR site for Experience Cloud, such as a single view or theme layout. To learn more, see Deploy Partial Site Content via Change Sets on page 297.

Digital Experience Bundle

Represents all content items that make up an enhanced LWR site for Experience Cloud.

Event Relay Configuration

Represents the configuration of an event relay, which relays platform events and change data capture events from Salesforce to Amazon EventBridge.

Development

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

IN THIS SECTION:

Lightning Components

Invalid HTML syntax in your LWC markup now results in a runtime error. Lightning Web Security is enabled by default in new Salesforce orgs.

Einstein Vision and Language

Discover Einstein Vision and Language on the Salesforce Developer Portal and enjoy a more integrated content experience.

Visualforce

Increase the security of your Visualforce pages by reviewing and enabling the release updates. For more information on features affected by these enhancements, refer to the **Visualforce Developer Guide**.

Apex

DataWeave in Apex is now in Developer Preview. Run more operations in user mode using enhanced System.Database methods. Improve the readability of your Apex code by using the new System.Assert class methods. Reference the new order of execution diagram, which depicts the order in which events are applied when you save a record in Salesforce. Enjoy improved access to query results via reduced cursor limits. Use the DailyAsyncApexTests limit that is now exposed. This limit represents the number of Apex test classes that can be queued in a 24-hour period. Call invocable actions from Apex code using the `Invocable.Action` class methods.

API

These items are new, changed, or deprecated in API version 56.0.

Packaging

Transfer the ownership of an unlocked or second-generation managed package from one Dev Hub org to another. Update your packages for enhanced domains and partitioned domains. Do more with increased limits on feature parameters, and understand the components available in managed packages better with expanded documentation.

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 (Generally Available)

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

Access the AppExchange Developer Center, a curated library of resources to help you build solutions faster using the latest Salesforce technology.

Change Data Capture

Filter streams of change events.

Platform Events

Filter platform event streams, monitor event usage in Setup, and monitor the daily event delivery usage in REST API.

Event Bus

Stream your Salesforce events to Amazon EventBridge. Use Pub/Sub API to publish and subscribe to events.

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components

Invalid HTML syntax in your LWC markup now results in a runtime error. Lightning Web Security is enabled by default in new Salesforce orgs.

> **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.

Create Overlays with the New Modal Component

Use modals to interrupt a user's workflow and draw attention to an important message. A modal, which displays the message on top of the current app window, requires a user to interact with it to regain control over the app.

Fix Invalid HTML Syntax to Avoid Component Loading Errors

An additional list of invalid HTML syntax in LWC now results in a warning.

Invalid Nested Templates No Longer Render

`<template>` elements with an invalid attribute or directive return a warning and no longer render at runtime.

Remove Non-Global Design Tokens in CSS

Only design tokens labeled as Global Access (GA) are supported in your Lightning web components' CSS. Non-global design tokens no longer work after Spring '23.

Synchronize Component Data Without a Page Refresh by Using RefreshView API (Pilot)

Whether user-driven or app-invoked, the ability to synchronize data without reloading an entire page is a key user experience requirement. The new `lightning/refresh` module and RefreshView API provide a standard way to refresh component data in LWC and Aura. Previously, LWC lacked a data refresh API, and Aura only supported the legacy `force:refreshView`, which doesn't meet the requirements of modern web development. RefreshView API's detailed control of refresh scope lets developers create refined user experiences while maintaining backward compatibility.

Use Lightning Web Security by Default in New Salesforce Orgs

The Use Lightning Web Security for Lightning web components setting is enabled by default in new Salesforce orgs. This enablement continues the gradual rollout of the new Lightning Web Security architecture announced in Spring '22.

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Access iframe Content in Lightning Web Security

Lightning Web Security now permits Lightning web components to access content in `iframe` elements. With this change, you can use another web development feature that Lightning Locker blocks.

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.

Create Self-Service Kiosk Applications—A New Use Case for BarcodeScanner

Use BarcodeScanner's new features to create applications that work as a self-service kiosk. The front-facing camera support makes for a better user experience when scanning barcodes, and now you can customize the UI to fit your aesthetic and business needs.

Managing a Device's Calendar Events Using Lightning Web Components

Use the CalendarService API to access native device functionality to view calendar events from selected device calendars, create, update, and delete calendar events, and generally reduce the friction of managing calendar events on mobile devices using Lightning web components.

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 Cloud.

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>
```

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)

Create Overlays with the New Modal Component

Use modals to interrupt a user's workflow and draw attention to an important message. A modal, which displays the message on top of the current app window, requires a user to interact with it to regain control over the app.

Where: This feature is available for Lightning Experience in all editions.

How: To create a modal component, import `LightningModal` from `lightning/modal` in your JavaScript file. Then, create a component class that extends `LightningModal`.

```
/* c/myModal.js */

import { api } from 'lwc';
import LightningModal from 'lightning/modal';

export default class MyModal extends LightningModal {

    handleOkay() {
        this.close('okay');
    }
}
```

This component doesn't use a `lightning-modal` tag. Instead, the modal's HTML template uses helper `lightning-modal-*` components to make the modal's header, footer, and body. The `lightning-modal-body` component is required, and the others are optional.

```
<!-- c/myModal.html -->

<template>
    <lightning-modal-header label="My Modal Heading"></lightning-modal-header>
    <lightning-modal-body>This is the modal's contents.</lightning-modal-body>
    <lightning-modal-footer>
        <lightning-button label="OK" onclick={handleOkay}></lightning-button>
    </lightning-modal-footer>
</template>
```

SEE ALSO:

   Component Library

Fix Invalid HTML Syntax to Avoid Component Loading Errors

An additional list of invalid HTML syntax in LWC now results in a warning.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Cloud sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components open source.

How: The framework enforces valid syntax in all Lightning web components and already throws an error for a number of invalid syntax. In Spring '22, the web console displays additional invalid HTML syntax warnings to promote standard HTML practices in your code.

📝 **Note:** These warnings may be converted to errors in a future release and can prevent your components from loading correctly.

The additional invalid HTML syntax includes:

- `abandoned-head-element-child`—Unexpected element after the `head` tag

- `closing-of-element-with-open-child-elements`—Unexpected closing tag before a child tag is closed, like with `<template><child></template>`
- `disallowed-content-in-noscript-in-head`—Unexpected content in `noscript` tag in `head`. Only zero or more `link`, `style`, or `meta` elements are allowed.
- `end-tag-without-matching-open-element`—Missing open tag for an end tag, such as `</template>`
- `eof-in-element-that-can-contain-only-text`—Unexpected end of file in element that can contain only text
- `misplaced-doctype`—Unexpected `doctype` tag after the `head` tag or another invalid location
- `misplaced-start-tag-for-head-element`—Unexpected start tag for the `head` element instead of directly after the `doctype` tag
- `missing-doctype`—Missing a `doctype` tag before other content
- `nested-noscript-in-head`—Unexpected `noscript` tag within another `noscript` tag
- `non-conforming-doctype`—Expected `<!doctype html>`, `<!DOCTYPE html>`, or another valid `doctype` tag
- `open-elements-left-after-eof`—Unexpected end of file where a closing tag is expected

LWC flags invalid markup for you, such as a missing closing tag or an extra closing tag. We recommend that you install the Salesforce Extension Pack extension in Visual Studio Code as it flags invalid HTML syntax on a file. Additionally, you can enable HTML validation in Visual Studio Code using an HTML validator plugin.

In VS Code, warnings appear as a popover in the editor and the offending tags are underlined with a squiggly line. We recommend that you fix the warnings to future-proof your code even though you can still push or deploy your component to your org.

For errors, the component code displays with red squiggly lines with a popover that explains the problem. The component can be saved locally but it can't be pushed or deployed to your org.

In the example, remove the extra `</template>` tag in this component example to conform to HTML standards.

```
<template>
    <div>Hello</div>
    </template>
</template><!-- Remove extra closing tag -->
```

Invalid Nested Templates No Longer Render

`<template>` elements with an invalid attribute or directive return a warning and no longer render at runtime.

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.

How: Non-root `<template>` elements must include one of the following directives: `for:each`, `iterator:iteratorName`, or `if:true|false`.

Fix your component template to remove invalid directives or attributes in your nested `<template>` elements. Invalid `<template>` usage is ignored—the template and its children don't render in the DOM.

If you use VS Code with the Salesforce Extension Pack extension, the warning appears as a popover on the invalid `<template>` element.

If you use Lightning web components in Open Source, the compiler displays the warning in your terminal.

In Winter '23, invalid nested templates rendered at runtime but will no longer render after the October 10, 2022 patch.

> 📝 Note: In Summer '22, invalid nested templates no longer rendered. Before Summer '22, content or markup that's enclosed within a non-root `<template>` element with an invalid attribute or directive was flattened and rendered into its parent node.

For example, the non-root `<template>` element in this example contains an invalid attribute, `class`.

```
<template>
    <!-- This template element contains an invalid attribute -->
    <!-- This invalid template and its content will no longer render -->
    <template class="slds-m-around_medium">
        Hello
    </template>
</template>
```

To fix the component, remove the invalid attribute or use another element like `<div>` or `<span>`, depending on your use case.

```
<template>
    <div class="slds-m-around_medium">
        Hello
    </div>
</template>
```

Remove Non-Global Design Tokens in CSS

Only design tokens labeled as Global Access (GA) are supported in your Lightning web components' CSS. Non-global design tokens no longer work after Spring '23.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Cloud sites, and all versions of the Salesforce mobile app.

How: Ensure that your Lightning web components are using design tokens with global support only.

📝 Note: After Spring '23, usage of non-global design tokens, such as those labeled as internal (I), results in a validation error `No TOKEN named tokenName found` during component save for API version 57.0 and later.

For example, this usage of the non-global `--lwc-heightInput` token isn't allowed and returns the error `No TOKEN named force:base.heightInput found`.

```
/* This non-global token usage doesn't work */
div {
    height: var(--lwc-heightInput);
}
```

The following usage is allowed, but it's invalid because of the non-global `--lwc-heightInput` token, which is placed inside the `calc` CSS function.

```
/* This doesn't work after Spring '23 */
.resultcontainer{
    height: calc(var(--lwc-height-header) - (var(--lwc-heightInput)));
}
```

Replace the non-global tokens in your CSS with a global token or use a custom Aura design token instead.

```
div {
    height: var(--lwc-lineHeightText); /* use a global design token */
}

.resultcontainer {
```

```
    height: calc(var(--lwc-height-header) - (var(--lwc-lineHeightText)));
}
```

SEE ALSO:

Lightning Aura Components Developer Guide: Standard Design Tokens—force:base

Lightning Web Components Developer Guide: SLDS Design Tokens

Synchronize Component Data Without a Page Refresh by Using RefreshView API (Pilot)

Whether user-driven or app-invoked, the ability to synchronize data without reloading an entire page is a key user experience requirement. The new `lightning/refresh` module and RefreshView API provide a standard way to refresh component data in LWC and Aura. Previously, LWC lacked a data refresh API, and Aura only supported the legacy `force:refreshView`, which doesn't meet the requirements of modern web development. RefreshView API's detailed control of refresh scope lets developers create refined user experiences while maintaining backward compatibility.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Contact your Salesforce representative to request to join the RefreshView API pilot.

> ✏️ Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: RefreshView API updates the data for a specific hierarchy of components, known as a view, without reloading an entire page. It synchronizes data externally sourced by components in that view and supports refreshes triggered by end users or web components. RefreshView API provides a standard mechanism for data refresh experiences in both LWC and Aura components. It allows flexible control of refresh scopes, and for Aura developers it can replace the legacy `force:refreshView`.

Use Lightning Web Security by Default in New Salesforce Orgs

The Use Lightning Web Security for Lightning web components setting is enabled by default in new Salesforce orgs. This enablement continues the gradual rollout of the new Lightning Web Security architecture announced in Spring '22.

Where: This change applies to new Salesforce orgs that use Lightning Experience in all editions. The Lightning Web Security setting affects Lightning web components that are used in Aura-based Experience Cloud sites. It doesn't affect LWR-based Experience Cloud sites. Scratch orgs also have Lightning Web Security enabled by default.

Why: Lightning Locker has been the default security architecture for Lightning components. Lightning Web Security (LWS) is replacing Lightning Locker for Lightning web components initially, and then we intend to add support for Aura components over several releases. When enabled, LWS currently supports Lightning web components only. Lightning Locker still supports Aura components. This change affects your new org only if you add Lightning web components or install managed packages that contain Lightning web components. The Lightning web components then run with LWS instead of Lightning Locker.

How: The setting **Use Lightning Web Security for Lightning web components** is located in Session Settings in Setup. You can return the org to use Lightning Locker for Lightning web components by deselecting the setting. If your org has no Lightning components, there's no reason to return to Lightning Locker. If your org has only Lightning web components, consider returning to Lightning Locker only if components exhibit issues with LWS enabled.

If you plan to populate the new org with pre-existing or packaged Lightning web components, be sure to test first in a sandbox environment with LWS enabled. If your Lightning web components aren't working properly with LWS and you can't solve the issue using these resource links, open a Support case.

Use the `lockerServiceNext` boolean in scratch org definition files to enable and disable LWS in your scratch orgs. For example, add these lines to the definition file to disable LWS in your scratch org.

```
"settings": {
    "securitySettings": {
        "sessionSettings": {
            "lockerServiceNext": false
          }
      }
}
```

SEE ALSO:

Lightning Web Components Developer Guide: Lightning Web Security

Lightning Web Components Developer Guide: Enable Lightning Web Security in an Org

Lightning Web Components Developer Guide: Which Components Are Supported by Lightning Web Security

Lightning Web Components Developer Guide: Workflow to Try Your LWCs in Lightning Web Security

Lightning Web Components Developer Guide: Troubleshoot Lightning Web Security

Lightning Web Security FAQ

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Where: This change applies to Lightning Experience in all editions and LWR-based Experience Cloud sites.

These APIs have new distortions documented in the LWS Distortion Viewer. Corresponding ESLint rules are included in the ESLint package.

- `Function` value
- `HTMLObjectElement.prototype.data` setter
- `eval` value

These distortions and associated ESLint rules were removed.

- `HTMLFrameElement.prototype.contentDocument` getter
- `HTMLFrameElement.prototype.contentWindow` getter
- `HTMLIFrameElement.prototype.contentDocument` getter
- `HTMLIFrameElement.prototype.contentWindow` getter
- `HTMLObjectElement.prototype.contentDocument` getter
- `HTMLObjectElement.prototype.contentWindow` getter
- `MessageEvent.prototype.source` getter
- `Window.prototype.opener` getter
- `Window.prototype.parent` getter

SEE ALSO:

Access iframe Content in Lightning Web Security

Lightning Web Components Developer Guide: Install ESLint Rules for Lightning Web Security

Lightning Web Security FAQ

Access iframe Content in Lightning Web Security

Lightning Web Security now permits Lightning web components to access content in `iframe` elements. With this change, you can use another web development feature that Lightning Locker blocks.

Where: This change applies to Lightning Experience in all editions and LWR-based Experience Cloud sites.

SEE ALSO:

API Distortion Changes in Lightning Web Security

Lightning Web Components Developer Guide: How Lightning Web Security Compares to Lightning Locker

Lightning Web Security FAQ

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:** Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

Why: 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.

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`.

Lightning Experience and Experience Cloud include the synthetic shadow polyfill by default. 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.

By default, slotted content is rendered in native shadow. Slotted content isn't descended from the component it's nested in, so you can slot synthetic shadow content into a native shadow component. This also means that slotted content isn't affected by how your browser

renders the `#shadow-root` of the component containing the slot. For example, if your browser renders a native component in synthetic shadow, native content slotted into that component is still rendered in native shadow.

SEE ALSO:

> *Lightning Web Components Developer Guide*: Mixed Shadow Mode (Developer Preview) (can be outdated or unavailable during release preview)

Create Self-Service Kiosk Applications–A New Use Case for BarcodeScanner

Use BarcodeScanner's new features to create applications that work as a self-service kiosk. The front-facing camera support makes for a better user experience when scanning barcodes, and now you can customize the UI to fit your aesthetic and business needs.

Where: These features are currently available in Salesforce App and Mobile Publisher for Experience Cloud implementations of BarcodeScanner.

> **Note:** Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile, or desktop.

Why: The Salesforce Winter '23 release brings a slew of exciting new Lightning Web Component features for users, admins, and developers alike. Among these new features is the enhanced BarcodeScanner LWC plugin. Use these new features to create customized scanning apps, including self-service or unattended "kiosk-style" apps.

How: The updates and new feature additions to BarcodeScanner are documented as new parameters on the `BarcodeScannerOptions` object. See BarcodeScanner Data Types for the complete list of options.

For more information, see Create a Self-Service Kiosk Application and BarcodeScanner Example–Self-Service Kiosk in the Lightning Web Components Developer Guide.

Managing a Device's Calendar Events Using Lightning Web Components

Use the CalendarService API to access native device functionality to view calendar events from selected device calendars, create, update, and delete calendar events, and generally reduce the friction of managing calendar events on mobile devices using Lightning web components.

Where: This feature is available for Mobile Publisher for Experience Cloud applications.

> **Note:** Building calendar-based functions using the CalendarService API only works in the mobile application, not the web version on mobile, or desktop.

Why: Today, wall calendars and paper planners are more like antiques and curiosities of a bygone era than modern organizational and productivity tools. Most folks track their daily schedules with calendar applications on their mobile devices, and now the functionality of mobile device calendars is just an API call away for Lightning Web Components developers. With CalendarService, you can develop components with calendar event functionality tailored to your audience's needs.

How: Using CalendarService in your Lightning web components is easy.

1. Import CalendarService into your component definition.

2. Run tests to ensure CalendarService is available before calling calendar-related functions.

3. Use the various calendar event functions to interact with device calendar events.

For full details, see Manage Calendar Events on a Mobile Device in the Lightning Web Components 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 and Language

Discover Einstein Vision and Language on the Salesforce Developer Portal and enjoy a more integrated content experience.

IN THIS SECTION:

Discover Einstein Vision and Language Docs on Salesforce Developer Docs

You can now access Einstein Vision and Language from Salesforce Developer Docs. Enjoy a seamless developer experience by exploring guides, API content, discussion forums, and other developer docs.

SEE ALSO:

Einstein Vision and Language Release Note

Einstein Release Notes

Discover Einstein Vision and Language Docs on Salesforce Developer Docs

You can now access Einstein Vision and Language from Salesforce Developer Docs. Enjoy a seamless developer experience by exploring guides, API content, discussion forums, and other developer docs.

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

SEE ALSO:

Salesforce Developer Docs : Discover Einstein Vision and Language

Visualforce

Increase the security of your Visualforce pages by reviewing and enabling the release updates. For more information on features affected by these enhancements, refer to the **Visualforce Developer Guide**.

IN THIS SECTION:

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.

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first available in Winter '23.

Escape the Label Attribute of <apex:inputField> Elements to Prevent Cross-Site Scripting in Visualforce Pages (Release Update)

To prevent malicious code from executing in cross-site scripting (XSS) attacks on your Visualforce pages, this release update escapes the label attribute of your `<apex:inputField>` tags. This update was first available in Winter '23.

Validate Getter and Setter Access Modifier Enforcement during Visualforce Expression Language Parsing (Release Update)

This release update has been postponed indefinitely and is not enforced in its present form. It has no customer impact, even if it's enabled.

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. 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

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first available in Winter '23.

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

When: Salesforce enforces this update in Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

How: To activate this release update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For **Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API**, follow the testing and activation steps.

SEE ALSO:

Apex Developer Guide: JsonAccess Annotation (can be outdated or unavailable during release preview)

Release Updates

Escape the Label Attribute of <apex:inputField> Elements to Prevent Cross-Site Scripting in Visualforce Pages (Release Update)

To prevent malicious code from executing in cross-site scripting (XSS) attacks on your Visualforce pages, this release update escapes the label attribute of your `<apex:inputField>` tags. This update was first available in Winter '23.

Where: This change applies to Salesforce Classic and Lightning Experience in 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: 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 then click the maintenance tab.

Why: This update improves the security of your Visualforce pages by automatically escaping the label attribute of all your existing `<apex:inputField>` elements. It also escapes the label attribute for `<apex:inputField>` elements that you create after enabling the update.

How: To activate this release update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Escape the Label Attribute of <apex:inputField> Elements to Prevent Cross-Site Scripting in Visualforce Pages, follow the testing and activation steps.

After you enable this update, label attributes that you already escaped are double-escaped. Double-escaped attributes don't render correctly on Visualforce pages. For instructions on how to locate and fix double-escaped attributes, see the testing steps for this release update.

SEE ALSO:

Visualforce Developer Guide: Cross Site Scripting (XSS)

Release Updates

Validate Getter and Setter Access Modifier Enforcement during Visualforce Expression Language Parsing (Release Update)

This release update has been postponed indefinitely and is not enforced in its present form. It has no customer impact, even if it's enabled.

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

When: This release update has been postponed indefinitely and is not enforced in its present form.

Apex

DataWeave in Apex is now in Developer Preview. Run more operations in user mode using enhanced System.Database methods. Improve the readability of your Apex code by using the new System.Assert class methods. Reference the new order of execution diagram, which depicts the order in which events are applied when you save a record in Salesforce. Enjoy improved access to query results via reduced cursor limits. Use the DailyAsyncApexTests limit that is now exposed. This limit represents the number of Apex test classes that can be queued in a 24-hour period. Call invocable actions from Apex code using the `Invocable.Action` class methods.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

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

DataWeave in Apex is now in Developer Preview. This feature enhances native Apex data transformation support by integrating Mulesoft's DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats.

Secure Even More Apex Code with User Mode Database Operations (Beta)

Run more database operations in user mode with the enhanced user-mode support. The new Database methods support an `accessLevel` parameter so that you can run the operations in user mode instead of in the default system mode.

Write Clear and Intentional Apex Assertions

Improve the readability of your Apex code by using the assert methods in the new `System.Assert` class that fit the exact conditions that you're checking for. We still support the existing `System` class assert methods. But we also recommend that you start using the new ones soon and that you update your existing code to use them.

Chart Your Apex Course with the Save Order of Execution Diagram

As you requested, here's a diagram to represent the save order of execution, which is the order that events are applied when you save a record in Salesforce.

Limits on Concurrently Open Query Cursors are Removed

Query cursors open concurrently per user are no longer restricted in number. Batch Apex start, execute, and finish method result sets are also included.

Get Org Limit for Daily Maximum Apex Test Classes

Use the new DailyAsyncApexTests limit that represents the number of Apex test classes that can be queued in a 24-hour period. This limit is available in API version 56.0 and later.

Call Invocable Actions from Apex (Generally Available)

Invocable.Action is a new Apex class that allows you to call invocable actions from Apex code.

SEE ALSO:

Apex: New and Changed Items

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

DataWeave in Apex is now in Developer Preview. This feature enhances native Apex data transformation support by integrating Mulesoft's DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats.

> **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 in a production environment. You can provide feedback and suggestions for the DataWeave in Apex feature in the Trailblazer Community.

Where: This feature is available in scratch orgs where the DataWeaveInApex feature is enabled, in both Lightning Experience and Salesforce Classic experience. The Developer Preview of DataWeave in Apex doesn't support packaging.

How: You can create DataWeave scripts as metadata and invoke them directly from Apex. Similar to Apex, DataWeave scripts are run within Salesforce application servers, enforcing the same heap and CPU limits on the executing code.

This example shows the transformation of an input CSV file into Contact SObjects.

```
// CSV data for Contacts

String inputCsv = 'first_name,last_name,email\nCodey,"The Bear",codey@salesforce.com';
DataWeave.Script dwscript = DataWeave.Script.createScript('csvToContacts');
DataWeave.Result dwresult = dwscript.execute(new Map<String, Object>{'records' => inputCsv});
List<Contact> results = (List<Contact>)dwresult.getValue();

Assert.areEqual(1, results.size());
Contact codeyContact = results[0];
Assert.areEqual('Codey',codeyContact.FirstName);
Assert.areEqual('The Bear',codeyContact.LastName);
```

The CSV data is transformed to objects using the DataWeave script csvToContacts.dwl.

```
%dw 2.0
input records application/csv
output application/apex
---
records map(record) -> {
 FirstName: record.first_name,
 LastName: record.last_name,
 Email: record.email
} as Object {class: "Contact"}
```

SEE ALSO:

DataWeave Code Samples

DataWeave Namespace

Secure Even More Apex Code with User Mode Database Operations (Beta)

Run more database operations in user mode with the enhanced user-mode support. The new Database methods support an `accessLevel` parameter so that you can run the 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: We introduced the user mode feature in the Summer '22 release with an initial set of overloaded `System.Database` methods that perform DML and query operations. We added these new methods in this release.

- `Database.getQueryLocator` methods
- Database DML methods (`deleteAsync`, `deleteImmeidate`, `insertAsync`, `insertImmediate`, `updateAsync`, and `updateImmediate`)

SEE ALSO:

Apex Developer Guide: Enforce User Mode for Database Operations (Beta)

System Namespace

Write Clear and Intentional Apex Assertions

Improve the readability of your Apex code by using the assert methods in the new `System.Assert` class that fit the exact conditions that you're checking for. We still support the existing `System` class assert methods. But we also recommend that you start using the new ones soon and that you update your existing code to use them.

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

Why: Apex provides three assert methods. `System.assert()`, `System.assertEquals()`, and `System.assertNotEquals()`. While adequate for many use cases, these methods can result in ambiguous or verbose error messages. For example, this Apex code checks for a null value.

```
System.assertEquals(null, 'null');
```

The resulting exception is correct, but ambiguous between literal nulls and `null` strings.

```
System.AssertException: Assertion Failed: Expected: null, Actual: null
```

The new `System.Assert` class provides methods that handle all types of logical assertions and comparisons. When you use an assert method intended for a specific condition, the clarity of your Apex code improves. And if the assertion results in an exception, it's easier to read and understand.

How: Choose a method in the new `System.Assert` class that best fits the condition. For example, to assert whether two values are equal, use the `Assert.areEqual()` method, which is equivalent to the existing `System.assertEquals()`:

```
String sub = 'abcde'.substring(2);
Assert.areEqual('cde', sub);
```

Here's an example of checking for null values.

```
String myString = null;
Assert.isNull(myString, 'String should be null');
```

This example checks that exceptions are thrown from a method you're testing and that they're of the expected type.

```
try {
    methodUnderTest();
    Assert.fail('Exception failure is always an option');
} catch (Exception ex) {
    Assert.isInstanceOfType(ex, DmlException.class);
```

```
    // Additional assertions
}
```

System Namespace

Apex Reference Guide: Assert Class

Chart Your Apex Course with the Save Order of Execution Diagram

As you requested, here's a diagram to represent the save order of execution, which is the order that events are applied when you save a record in Salesforce.

Where: This change applies to documentation in the *Apex Developer Guide*.

How: The diagram is available on the Salesforce Architects site and linked from Triggers and Order of Execution in the Apex Developer Guide.

Limits on Concurrently Open Query Cursors are Removed

Query cursors open concurrently per user are no longer restricted in number. Batch Apex start, execute, and finish method result sets are also included.

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

How: Previously, these limits applied to open query cursors, and are now removed.

- Maximum number of query cursors open concurrently per user
- Maximum number of query cursors open concurrently per user for the Batch Apex `start` method
- Maximum number of query cursors open concurrently per user for the Batch Apex `execute` and `finish` methods

Enjoy Longer Access to More Query Results

Get Org Limit for Daily Maximum Apex Test Classes

Use the new DailyAsyncApexTests limit that represents the number of Apex test classes that can be queued in a 24-hour period. This limit is available in API version 56.0 and later.

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

How: Obtain the org limit value by executing Apex methods `OrgLimits.getAll()` or `OrgLimits.getMap()`, or by calling `/services/data/v56.0/limits/` via HTTP.

Get Daily Limit for Running Apex Test Classes Asynchronously

Apex Reference Guide: OrgLimits Class (can be outdated or unavailable during release preview)

Apex Developer Guide: Lightning Platform Apex Limits (can be outdated or unavailable during release preview)

Call Invocable Actions from Apex (Generally Available)

Invocable.Action is a new Apex class that allows you to call invocable actions from Apex code.

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

How: Reference Invocable.Action in your Apex code.

For example, this class calls the standard invocable action "chatterPost" to post a message to the current user's feed.

```
public class MyApexClass {
    public void postToChatter(String recordId) {
        Invocable.Action action = Invocable.Action.createStandardAction('chatterPost');
        action.setInvocationParameter('text', 'This is an example Chatter post.');
        action.setInvocationParameter('subjectNameOrId', recordId);
        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 class calls a custom invocable action named Doubler that returns a number that's twice the input value.

```
public class MyApexClass {
    public void doubler (Double input) {
        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'));

        }

    }
}
```

API

These items are new, changed, or deprecated in API version 56.0.

IN THIS SECTION:

[Prevent Record Duplication with Idempotent Record Writes for UI API (Beta)](#)

Use idempotent record writes to avoid duplication of records and server-side operations.

[Enjoy Longer Access to More Query Results](#)

Some limitations on query results have been removed. Pagination beyond 10 result sets per user is now supported, and query results are available for 2 days, including results in nested queries.

Use the new `DailyAsyncApexTests` limit information in the Limits REST resource to understand your org's limit for asynchronous Apex test executions. The `DailyAsyncApexTests` limit returns the maximum number of Apex tests that can be queued in a 24-hour period and the remaining number of Apex tests available based on your current usage. This limit is available in API version 56.0 and later.

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.

Prevent Record Duplication with Idempotent Record Writes for UI API (Beta)

Use idempotent record writes to avoid duplication of records and server-side operations.

Where: This change applies to Lightning Experience and all versions of the mobile app in Developer, Enterprise, and Unlimited editions.

📝 Note: Contact Salesforce to enable Idempotent Record Writes for UI API. 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: Record duplication can occur when an app or client encounters a network connection issue. The client retries its original operation multiple times although the server already fully processed the operation.

By making a request idempotent, your records on the server remain in the same state even if an identical request is made once or multiple times. Idempotent record writes save server-side processing costs by returning cached responses for PATCH and DELETE operations.

How: Currently, only the `/ui-api/records` endpoint supports idempotent record writes for POST, PATCH, and DELETE requests. To make a request idempotent, include an `Idempotency-Key` value in your request header.

```
curl --location --request POST 'https://<Host>/services/data/v56.0/ui-api/records' \
--header 'Authorization: Bearer <AuthToken>' \
--header 'Content-Type: application/json' \
--header 'Idempotency-Key: 12cfe4e6-e477-4de8-aa4e-95d31aa2be24' \
--header 'Cookie: BrowserId=yVVAfz9GEeuRCtc5jOsncA; CookieConsentPolicy=0:0' \
--data-raw '{
    "apiName": "ResourceAbsence",
    "fields": {
        "CreatedDate": "2022-12-01T14:52:16.000Z",
        "LastModifiedDate": "2022-12-01T14:52:16.000Z",
        "ResourceId": "0Hnxx0000004C92CAE",
        "Start": "2022-12-02T14:52:16.000Z",
        "End": "2022-12-03T14:52:16.000Z"
    }
}'
```

The `Idempotency-Key` header value is in the UUID v4 format. You can use a library that supports UUID v4 generation, including the Java UUID utility.

We recommend that you use a unique `Idempotency-Key` header value for each operation. The idempotency key doesn't provide idempotency indefinitely and auto-expires after 30 days if the same key is reused.

An idempotent request returns 2XX status codes for a successful operation. It can also return one of these HTTP status error codes.

400

You can receive one of the following errors.

- Idempotency not supported—Remove the `Idempotency-Key` header and retry the operation.
- `Idempotency-Key is not in valid format`—Generate a new `Idempotency-Key` header value and retry the operation.

422

The `Idempotency-Key` header value is already used by the same user for a different request. Generate a new `Idempotency-Key` value and retry the operation.

409

Either a different user has issued the same request earlier or this duplicate request is issued within a short time because an earlier request terminated abruptly. If you include a `Retry-After` header, a follow-up request is sent.

5XX

A server error occurred. If you include a `Retry-After` header, a follow-up request is sent.

SEE ALSO:

User Interface API Developer Guide: Prevent Record Duplication (Beta)

Enjoy Longer Access to More Query Results

Some limitations on query results have been removed. Pagination beyond 10 result sets per user is now supported, and query results are available for 2 days, including results in nested queries.

Where: This change applies to all versions of Apex, SOAP API, REST API, Bulk API, Bulk API 2.0, and any features built using these technologies. Although introduced in Winter '23 in API version 56.0, the change is universal and available to all API versions.

Why: This change removes some limitations on query results that were too large or contained complex records. Previously, a maximum of 10 result sets per user were accessible at the same time, and the oldest set expired after 15 minutes of inactivity.

Also, query locators, the identifier used in API query calls to get additional result sets, have a different format. Now, locator strings begin with the prefix `0r8`. Previously, query locator strings began with the prefix `01g`. With five new extended error codes, you can better identify and resolve issues related to query locators and requests for additional query results.

How: This change is available by default. The operations to retrieve additional query result sets hasn't changed. Continue to use the `queryMore()` SOAP API call or the `nextRecordsUrl` field in the REST API `query()` call. Retrieval of additional query results still is performed automatically in Apex, Bulk API, and Bulk API 2.0.

SEE ALSO:

Salesforce Release Notes: No More Limit Restrictions on Concurrently Open Query Cursors

Salesforce Developer Limits and Allocations Quick Reference: API Query Cursor Limits

Salesforce SOAP API Guide: Core Data Types Used in API Calls

Get Daily Limit for Running Apex Test Classes Asynchronously

Use the new `DailyAsyncApexTests` limit information in the Limits REST resource to understand your org's limit for asynchronous Apex test executions. The `DailyAsyncApexTests` limit returns the maximum number of Apex tests that can be queued in a 24-hour period and the remaining number of Apex tests available based on your current usage. This limit is available in API version 56.0 and later.

SEE ALSO:

REST API Developer Guide: Limits

Apex Developer Guide: Lightning Platform Apex Limits

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 URIs 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:

- Upgrade your applications to function with more current API versions. 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

Transfer the ownership of an unlocked or second-generation managed package from one Dev Hub org to another. Update your packages for enhanced domains and partitioned domains. Do more with increased limits on feature parameters, and understand the components available in managed packages better with expanded documentation.

IN THIS SECTION:

Transfer Package Ownership to a Different Dev Hub (Beta)

Transfer the ownership of an unlocked or second-generation managed package from one Dev Hub org to another. A transfer can occur internally between two Dev Hub orgs that you own, or you can transfer a package externally to another Salesforce customer, Salesforce Partner, or ISV. This change provides a way to sell an unlocked or second-generation managed package.

Update Your Packages for Enhanced Domains and Partitioned Domains

Enhanced domains and partitioned domains increase the variability of the domains that Salesforce hosts. To allow your package components to work in all orgs, search for hard-coded URLs for the domains that Salesforce hosts, such as content files and Visualforce pages. Then update any hard-coded URLs to use a relative path or dynamically generated hostname. When you follow this recommendation, the link works regardless of the org type, My Domain settings, and whether enhanced domains are enabled.

Implement More Feature Parameters

The default limit on feature parameters has increased from 25 to 200. Use feature parameters to activate pilot features, track activation metrics, or make features available for a limited time.

Understand Component Behaviors in Managed Packages

The expanded documentation for component behavior in managed packages includes many components that previously weren't documented.

Transfer Package Ownership to a Different Dev Hub (Beta)

Transfer the ownership of an unlocked or second-generation managed package from one Dev Hub org to another. A transfer can occur internally between two Dev Hub orgs that you own, or you can transfer a package externally to another Salesforce customer, Salesforce Partner, or ISV. This change provides a way to sell an unlocked or second-generation managed package.

Where: This change applies to unlocked and second-generation managed packages.

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

How: To initiate a package transfer, log a case with either Salesforce Partner Support, or Salesforce Customer Support. Because this is a complex procedure, Salesforce performs the package transfer process for you.

We don't permit package transfers to or from a Dev Hub located in Government Cloud.

SEE ALSO:

Salesforce DX Developer Guide: Transfer a Second-Generation Managed Package to a Different Dev Hub (Beta)

Salesforce DX Developer Guide: Transfer an Unlocked Package to a Different Dev Hub (Beta)

Update Your Packages for Enhanced Domains and Partitioned Domains

Enhanced domains and partitioned domains increase the variability of the domains that Salesforce hosts. To allow your package components to work in all orgs, search for hard-coded URLs for the domains that Salesforce hosts, such as content files and Visualforce pages. Then update any hard-coded URLs to use a relative path or dynamically generated hostname. When you follow this recommendation, the link works regardless of the org type, My Domain settings, and whether enhanced domains are enabled.

Where: This change applies to unlocked and second-generation managed packages. Enhanced domains and partitioned domains are available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Link to Salesforce Domains in Packages (new)

ISVforce Guide: Call Salesforce URLs Within a Package (updated)

Salesforce Help: Enhanced Domains

Salesforce Help: Partitioned Domains

Implement More Feature Parameters

The default limit on feature parameters has increased from 25 to 200. Use feature parameters to activate pilot features, track activation metrics, or make features available for a limited time.

Where: This change applies to new and existing first- and second-generation managed packages.

How: If you're new to using feature parameters, start by installing the Feature Management App in to your License Management Org.

SEE ALSO:

Salesforce DX Developer Guide: Manage Features in Managed Packages

Salesforce DX Developer Guide: Install and Set Up the Feature Management App in Your License Management Org

Understand Component Behaviors in Managed Packages

The expanded documentation for component behavior in managed packages includes many components that previously weren't documented.

Where: This change applies to documentation in the *Salesforce DX Developer Guide*.

Why: Understanding component behavior in managed packages is essential to your success. To learn more, refer to the enhanced Components Available in Managed Packages.

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:

Disable Email Notifications for Inactive Sandboxes

Salesforce notifies sandbox users of impending deletion of sandboxes that have been inactive for 180 days or longer. A Salesforce admin can decide to opt out users from receiving notification emails for sandboxes created from a specific source org. After automated email notifications are disabled, you can view information for deleted sandboxes from the View Setup Audit Trail page.

Identify Which Sandboxes Get a Preview of the Next Salesforce Release

View which sandboxes get upgraded early (preview), and which sandboxes are scheduled to be upgraded with production orgs (non-preview) during major Salesforce releases. Preview sandboxes provide early access to new features, so you can test your configurations before the production upgrade. Preview sandboxes are upgraded approximately 6 weeks in advance of production orgs during every major release.

Quickly Clone Developer and Developer Pro Sandboxes

For Developer and Developer Pro sandboxes hosted on Hyperforce, the Quick Clone technology enhances the speed at which they are replicated. This feature allows admins to make copies of customized sandboxes for each of their developers. Teams can focus more time on building solutions, and developers can be more productive.

Disable Email Notifications for Inactive Sandboxes

Salesforce notifies sandbox users of impending deletion of sandboxes that have been inactive for 180 days or longer. A Salesforce admin can decide to opt out users from receiving notification emails for sandboxes created from a specific source org. After automated email notifications are disabled, you can view information for deleted sandboxes from the View Setup Audit Trail page.

Where: This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

When: To provide you some time to disable email notifications, if you wish, we won't restart the process of identifying inactive sandboxes and sending out notifications until November 1, 2022.

Who: All users in the source (production) org with the Manage Sandbox user permission and the user that requested the sandbox are opted out of notifications of the upcoming expiration date.

Why: You prefer not to receive email notifications when a sandbox is about to expire.

How:

1. Log in to the source (production) org for the sandboxes.
2. From Setup, in the Quick Find box, enter `Dev Hub`, and then select **Dev Hub**.
3. Under Disable Sandbox Expiration Emails, click the **Enabled** toggle to opt out of email notifications.

Identify Which Sandboxes Get a Preview of the Next Salesforce Release

View which sandboxes get upgraded early (preview), and which sandboxes are scheduled to be upgraded with production orgs (non-preview) during major Salesforce releases. Preview sandboxes provide early access to new features, so you can test your configurations before the production upgrade. Preview sandboxes are upgraded approximately 6 weeks in advance of production orgs during every major release.

Where: This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

Why: For non-preview sandboxes, you don't see new features until they're generally available.

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

Quickly Clone Developer and Developer Pro Sandboxes

For Developer and Developer Pro sandboxes hosted on Hyperforce, the Quick Clone technology enhances the speed at which they are replicated. This feature allows admins to make copies of customized sandboxes for each of their developers. Teams can focus more time on building solutions, and developers can be more productive.

Where: This change applies to Developer and Developer Pro sandboxes hosted on Hyperforce.

Who: To clone a sandbox, you need the Manage Sandbox user permission.

How: Salesforce admins don't have to enable this feature. Quick Clone is the default for all developer sandboxes hosted on Hyperforce.

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy.

IN THIS SECTION:

Develop Platform Apps with Ease Using Visual Studio Code and Salesforce CLI

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 you to develop from anywhere without downloading software to your local device. With Code Builder, you can get a modern development environment that includes your favorite languages and frameworks, such as Apex, SOQL, and Lightning Web Components, all from within a browser.

Develop Platform Apps with Ease Using Visual Studio Code and Salesforce CLI

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 you to develop from anywhere without downloading software to your local device. With Code Builder, you can get a modern development environment that includes your favorite languages and frameworks, such as Apex, SOQL, and Lightning Web Components, all from within a browser.

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. Also see Terms and Conditions for Code Builder on its App Exchange listing.

How: Install the Code Builder (beta) managed package from AppExchange. Go to Code Builder documentation to learn about how you can try Code Builder.

SEE ALSO:

    Developers' Blog: Build From Anywhere

    Trailblazer Community Group: Code Builder Community

DevOps Center (Generally Available)

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 with DevOps Center (Generally Available)
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?
You asked, and we listened. We've added these new features and improved capabilities to DevOps Center for GA.

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 with DevOps Center (Generally Available)

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 in Developer, Professional, Enterprise, Performance, and Unlimited editions. DevOps Center hasn't been tested and isn't recommended for enablement in Government Cloud and Government Cloud Plus.

When: DevOps Center is generally available on December 9, 2022.

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**.

If you're currently using the DevOps Center beta, we'll push the upgrade to your org automatically. However, if you don't want to wait, you can go ahead and install it immediately from the DevOps Center Setup page.

SEE ALSO:

Salesforce Help: Install and Configure DevOps Center

Salesforce Help: Manage and Release Changes Easily and Collaboratively with DevOps Center

What's New in DevOps Center?

You asked, and we listened. We've added these new features and improved capabilities to DevOps Center for GA.

Where: This change applies to Lightning Experience in Developer, Professional, Enterprise, Performance, and Unlimited editions. DevOps Center hasn't been tested and isn't recommended for enablement in Government Cloud and Government Cloud Plus.

When: DevOps Center is generally available on December 9, 2022.

Swap a Refreshed Sandbox

Refreshing a sandbox creates a copy of the sandbox based on the production or sandbox org you copy it from. The sandbox refresh procedure creates a new org, copies the metadata and data from the source org, then deletes the old org after activation. Because the sandbox refresh results in deletion of the original org, DevOps Center loses connection with the original environment, but provides you the ability to swap the existing connected environment with the new environment. As part of the swap process, DevOps Center also ensures that the new environment is current with the latest source in the pipeline stage's branch.

See *Salesforce Help*: Swap a Development Environment

See *Salesforce Help*: Swap a Pipeline Environment

Manage Environments More Easily

You have more options to manage environments from the environment's menu in the Pipeline Environments tab:

- **Swap Environment**: Swap a development or pipeline environment with another after the pipeline is activated.

    - For development environments, if DevOps Center can determine that the environment was descended from the release environment, all unpromoted work items that are connected to the current dev environment are moved to the new dev environment. If DevOps Center can't determine that the environment was descended from the release environment, DevOps Center deploys all changes from the first pipeline stage's branch to the new dev environment.

    - For pipeline environments, if DevOps Center can determine that the environment was descended from the release environment, all work items that are connected to the current pipeline environment are moved to the new pipeline environment. If DevOps Center can't determine that the environment was descended from the release environment, DevOps Center deploys all changes from the pipeline stage's branch to the new pipeline environment.

- **Remove environment**: Remove an unused dev environment from the list. If you change your mind, you can re-add a removed environment. However, you can't remove an environment after it has an activity history associated with it. After an environment has an activity history, your options are to disconnect it or swap it.

- **Disconnect environment**: Disconnect a dev environment that is expired or you no longer plan to use to remove it from the list. You can disconnect an environment only if no active work items are associated with it. After it's disconnected, you can still view information about the environment in the Activity History but you can't use it again in the DevOps Center project. You can, however, use the environment in a different DevOps Center project.

- **Change Environment**: Select a different environment for a pipeline stage, if the pipeline isn't yet activated.

See *Salesforce Help*: Environment Management Options

Source Tracking Verification for Development Environments

When you connect a development environment, DevOps Center verifies that it has source tracking enabled and prevents you from connecting to a non-source-tracked environment.

Select and Connect Environments While You Build Your Pipeline

We've improved the experience for setting up your pipeline. You now define development and pipeline environments, and set up your pipeline all in one place: from the Pipeline Environments tab. You no longer have to define environments ahead of time. And you can quickly change environments, on the fly, before you activate the pipeline.

See *Salesforce Help*: Build Your Pipeline Using the Template

See *Salesforce Help*: Build Your Own Pipeline

Perform a Validate-Only Deployment

To make sure your deployment will succeed ahead of time, create a validate-only deployment. A validation checks the results of Apex tests and deploying components but doesn't save any components in the org. A validation enables you to view the success or failure messages that you would receive with an actual deployment. You can create a validation for only versioned stages.

Later, you can perform a quick deployment to promote changes to a pipeline stage or to your release environment without having to run tests.

See *Salesforce Help*: Run a Validate-Only Deployment

Update Project Details

You can change the name and description for a project from the Settings page.

See *Salesforce Help*: Update Project Details

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

IN THIS SECTION:

Salesforce Functions Updates

With Salesforce Functions you can 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 to employ custom, elastically scalable business logic using your preferred language and tools.

Salesforce Functions Updates

With Salesforce Functions you can 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 to employ custom, elastically scalable business logic using your preferred language and tools.

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

Access the AppExchange Developer Center, a curated library of resources to help you build solutions faster using the latest Salesforce technology.

IN THIS SECTION:

Get the Resources You Need to Build Innovative Solutions for AppExchange
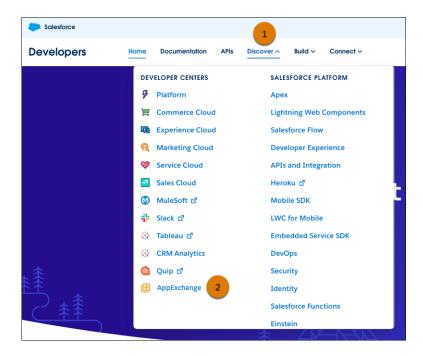
The AppExchange Developer Center is the home page for Salesforce partners to learn about solution development. Explore the comprehensive library. Find resources to read, watch, and listen to—all brought to you by experts.

Get the Resources You Need to Build Innovative Solutions for AppExchange

The AppExchange Developer Center is the home page for Salesforce partners to learn about solution development. Explore the comprehensive library. Find resources to read, watch, and listen to—all brought to you by experts.

Where: The AppExchange Developer Center is in the Discover section of the Salesforce Developers Website.

How: From the Salesforce Developers website, hover over **Discover** (1), then click **AppExchange** (2). Or visit directly at https://developer.salesforce.com/developer-centers/appexchange.

Change Data Capture

Filter streams of change events.

IN THIS SECTION:

Filter Your Stream of Change Events (Generally Available)

Receive only the change events that you're interested in instead of all record changes for an entity. Use a filter expression in a channel member, and specify the record and ChangeEventHeader fields and values to filter change events on. Only the matched change events are delivered to your client. With fewer events delivered, you make more efficient use of your event delivery allocation.

Add More Enriched Fields in a Channel for the Same Selected Entity

You can add up to 10 enriched fields in a channel member, even if the same entity is selected in members of different channels. Each channel member gets its separate allocation of 10 enriched fields. Previously, the allocation was enforced per selected entity in one or more channel members across all channels.

Filter Your Stream of Change Events (Generally Available)

Receive only the change events that you're interested in instead of all record changes for an entity. Use a filter expression in a channel member, and specify the record and ChangeEventHeader fields and values to filter change events on. Only the matched change events are delivered to your 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. If you use Government Cloud and your org was created before January 14, 2022, contact Salesforce to enable this feature. Government Cloud orgs created on or after January 14, 2022 have this feature enabled. This feature is available in all other clouds.

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 that you select in the filter expression are automatically added as enriched fields. As a result, change events 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 feature supports CometD and Pub/Sub API subscribers. It doesn't support Apex triggers.
> - All field types supported for enriched fields are supported in filter expressions.

This feature was offered last release in pilot. In this generally available release, we made these enhancements.

- You can filter on most ChangeEventHeader fields in the filter expression. Array fields in ChangeEventHeader aren't supported.
- You can rename fields without breaking filter expressions with old field names. Field names used in the filter expression map to the correct fields.

  > **Note:** If a filter expression was created before Winter '23, renamed fields work only after you update the filter expression and save the channel member again.

- If a Salesforce org has a namespace, you can use the namespace prefix in the filter expression.
- If a filter expression was created before an org had a namespace and the filter expression didn't contain the namespace prefix in the field names, the filter expression is automatically updated with the namespace prefix and continues to work.
- You can package a filter expression in PlatformEventChannelMember.
- When filter expressions are evaluated, field-level security is ignored. Filter expressions are evaluated on all fields included even if the subscriber doesn't have access to the fields. Events delivered in the filtered stream include only the fields that the subscriber has access to and exclude the fields the subscriber doesn't have access to.
- Validation is tighter with custom field type changes now blocked when the field is referenced in a filter expression.
- Fields used in a filter expression are case-insensitive.
- Text queries in a filter expression are case-insensitive, except for custom fields marked as case-sensitive.

Add More Enriched Fields in a Channel for the Same Selected Entity

You can add up to 10 enriched fields in a channel member, even if the same entity is selected in members of different channels. Each channel member gets its separate allocation of 10 enriched fields. Previously, the allocation was enforced per selected entity in one or more channel members across all channels.

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

How: For example, Channel1 contains selected entity AccountChangeEvent in its first member and LeadChangeEvent in its second member. Channel2 contains selected entity AccountChangeEvent in its first member. Each channel member can have up to 10 enriched fields, including the channel members for AccountChangeEvent. Previously, the channel members for AccountChangeEvent could have a total of 10 unique enriched fields across both channels.

SEE ALSO:

Change Data Capture Developer Guide: Enrich Change Events with Extra Fields

Platform Events

Filter platform event streams, monitor event usage in Setup, and monitor the daily event delivery usage in REST API.

IN THIS SECTION:

Filter Your Stream of Platform Events with Custom Channels (Generally Available)

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 filter expression for CometD clients. With fewer events delivered, subscribers can make more efficient use of the event delivery allocation.

Monitor Your Platform Event Usage in the User Interface

Monitor your event publishing and delivery usage easily in Setup for high-volume platform events and change events. The event publishing usage applies to all publishing methods for high-volume platform events. The event delivery usage counts against the default allocation for only to CometD, Pub/Sub API, and the `empApi` Lightning component.

Monitor Your Daily Event Delivery Usage with REST API

Use the `DailyDeliveredPlatformEvents` value of the `limits` REST resource to find out how many high-volume platform events and change events were delivered in the last 24 hours. This `limits` value counts against the default event delivery allocation for only CometD, Pub/Sub API, and the `empApi` Lightning component.

Filter Your Stream of Platform Events with Custom Channels (Generally Available)

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 filter expression for CometD clients. With fewer events delivered, subscribers can make more efficient use of the event delivery allocation.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. If you use Government Cloud and your org was created before January 14, 2022, contact Salesforce to enable this feature. Government Cloud orgs created on or after January 14, 2022 have this feature enabled. This feature is available in all other clouds.

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>2022-07-21T09:30:11-08:00
```

> 📝 Note:
> - This 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 feature supports CometD subscribers. It doesn't support other types of subscribers such as Apex triggers, flows, and processes.

This feature was offered last release in beta. In this generally available release, we made these enhancements.

- You can rename fields without breaking filter expressions with old field names. Field names used in the filter expression map to the correct fields.

  > 📝 Note: If a filter expression was created before Winter '23, renamed fields work only after you update the filter expression and save the channel member again.

- If a Salesforce org has a namespace, you can use the namespace prefix in the filter expression.

- If a filter expression was created before an org had a namespace and the filter expression didn't contain the namespace prefix in the field names, the filter expression is automatically updated with the namespace prefix and continues to work.
- You can package a filter expression in PlatformEventChannelMember.
- Validation is tighter validation with custom field type changes now blocked when the field is referenced in a filter expression.
- Fields used in a filter expression are case-insensitive.
- Text queries in a filter expression are case-insensitive.

Monitor Your Platform Event Usage in the User Interface

Monitor your event publishing and delivery usage easily in Setup for high-volume platform events and change events. The event publishing usage applies to all publishing methods for high-volume platform events. The event delivery usage counts against the default allocation for only to CometD, Pub/Sub API, and the `empApi` Lightning component.

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

How: From Setup, in the Quick Find box, enter `Platform Events`, and then select **Platform Events**.

Event Allocations		
Item	Usage	Allocation
High-Volume Platform Event Hourly Publishing Allocation	81	50000
High-Volume Platform Event and Change Event Daily Delivery Allocation	81	10000

Monitor Your Daily Event Delivery Usage with REST API

Use the `DailyDeliveredPlatformEvents` value of the `limits` REST resource to find out how many high-volume platform events and change events were delivered in the last 24 hours. This `limits` value counts against the default event delivery allocation for only CometD, Pub/Sub API, and the `empApi` Lightning component.

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

SEE ALSO:

REST API Developer Guide: List Org Limits

Event Bus

Stream your Salesforce events to Amazon EventBridge. Use Pub/Sub API to publish and subscribe to events.

IN THIS SECTION:

Stream Salesforce Events to Amazon EventBridge in AWS (Generally Available)

Use Event Relays for AWS to send platform events and change data capture events from Salesforce to Amazon EventBridge in AWS without writing an integration app or using middleware. By using event relays, your Salesforce event-driven apps can use AWS services to process events or send events to third-party and SaaS integrations. 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.

Benefit from Pub/Sub API Enhancements

Enhancements to Pub/Sub API include a new endpoint for Germany, a new service protection limit, and an event correlation key.

Stream Salesforce Events to Amazon EventBridge in AWS (Generally Available)
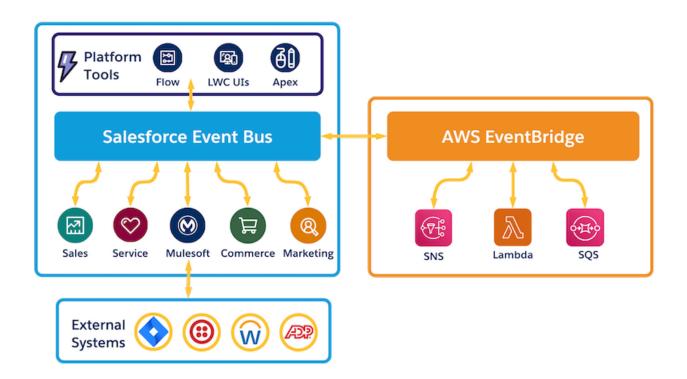
Use Event Relays for AWS to send platform events and change data capture events from Salesforce to Amazon EventBridge in AWS without writing an integration app or using middleware. By using event relays, your Salesforce event-driven apps can use AWS services to process events or send events to third-party and SaaS integrations. You can also send platform events from AWS back to Salesforce, where subscribers can process them using Salesforce Platform capabilities.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This feature isn't available for Hyperforce customers and Government Cloud.

When: This feature is available later in the Winter '23 release.

How: Configure event relay with Tooling API or Metadata API using EventRelayConfig. An event relay configuration includes your AWS account information and a platform event channel that you set up. After you create an event relay configuration, Salesforce creates a corresponding partner event source in EventBridge. When the event relay is running in Salesforce, the event bus in EventBridge receives the events published and relayed from the Salesforce event bus. You can send events from AWS back to Salesforce with an API Destination.

This diagram shows the bidirectional flow of events between Salesforce and Amazon EventBridge.

Event Relay was in beta last release and is now generally available. We made these enhancements since the beta.

- EventRelayConfig is now available in Metadata API.

- The structure of the request body for EventRelayConfig in Tooling API changed.

- You can create up to 200 event relays.

- An error recovery option for resuming events is available in the new relayOption field of EventRelayConfig.

- New error codes are added for errors received from Event Relay and AWS.

- New and removed fields in EventRelayFeedback:

  - New fields: `ErrorCode`, `LastRelayedEventTime`

  - Removed fields: `NumEventsDropped`, `NumEventsRelayed`, and `Replay`

SEE ALSO:

Event Relay Documentation

Develop Event-Driven Apps with Pub/Sub API (Generally Available)
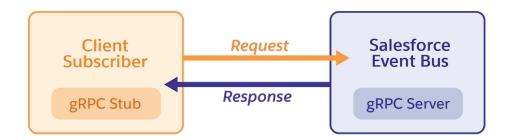
Publish and subscribe to platform events and change data capture events using Pub/Sub API, a secure, highly performant, and scalable API based on gRPC. Use one of the 11 supported programming languages, including Python, Java, Go, and Node. Get peace of mind with final publishing results instead of intermediate 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: As of June 30, 2022, Pub/Sub API is generally available.

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.

How: gRPC requires defining a service, which specifies the methods that can be called remotely with their parameters and return types. The server implements this interface and runs a gRPC server to handle client calls. The client has a stub that mirrors the methods available on the server.

Pub/Sub API uses protocol buffers as the Interface Definition Language (IDL) and as the underlying message interchange format. The Pub/Sub API service is defined in a proto file, with RPC method parameters and return types specified as protocol buffer messages. Within those protocol buffer messages, the payload of the published and delivered events is encoded in binary Apache Avro.

This proto file example is based on the Pub/Sub API proto file, but we shortened it in this illustration. This proto file defines the service by listing the methods to publish, subscribe, get the schema, and get the topic information.

```
// Request for the Subscribe streaming RPC method.
message FetchRequest {
    string topic_name = 1;
    ReplayPreset replay_preset = 2;
    bytes replay_id = 3;
    int32 num_requested = 4;
    string auth_refresh = 5;
}

// Response for the Subscribe streaming RPC method.
message FetchResponse {
    repeated ConsumerEvent events = 1;
    bytes latest_replay_id = 2;
    string rpc_id = 3;
    int32 pending_num_requested = 4;
}

service PubSub {
    rpc Subscribe (stream FetchRequest) returns (stream FetchResponse);

    rpc GetSchema (SchemaRequest) returns (SchemaInfo);

    rpc GetTopic (TopicRequest) returns (TopicInfo);

    rpc Publish (PublishRequest) returns (PublishResponse);

    rpc PublishStream (stream PublishRequest) returns (stream PublishResponse);
}
```

SEE ALSO:

Pub/Sub API Documentation

gRPC Documentation

Benefit from Pub/Sub API Enhancements

Enhancements to Pub/Sub API include a new endpoint for Germany, a new service protection limit, and an event correlation key.

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

How: Check out the details about these changes.

- (As of December 5, 2022) New endpoint for Frankfurt, Germany—A new endpoint is available to comply with data in transit privacy requirements. Using this endpoint ensures that event processing occurs via the Salesforce service located in the Frankfurt, Germany region. See Europe (Frankfurt) Endpoint in the Pub/Sub API documentation.

- (As of October 24, 2022) Service protection limit for subscription and publishing streams—To protect the service from subscribers and publishers of one Salesforce org that sends excessive amounts of requests, an error is returned to the client. The new error code is `sfdc.platform.eventbus.grpc.service.protection.stream.limit.triggered`. See Error Codes in the Pub/Sub API documentation.

- (As of September 8, 2022) New `PublishResult.correlationKey` field—The new `correlationKey` field is added to `PublishResult` for published events. It holds the ID set in the published event in `ProducerEvent.id`. Use this field to match a publish result with the published event. This field is useful if you want to retry publishing failed events. See Identify an Event with ProducerEvent.id and PublishResponse.correlationKey and Retry Publishing Failed Events in the Pub/Sub API documentation.

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

IN THIS SECTION:

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

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

Create custom experiences in Salesforce using Connect in Apex. Work with new commerce and named credentials features. Take advantage of site search and enhanced CMS workspaces, which are now generally available.

API: New and Changed Items

Access more data objects and metadata types in API version 56.0.

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

These components have changed.

`lightning-button`
   This attribute is new.

   - `stretch`—Expands the button to the available width. Default value is `false`.

`lightning-input-address`
   These attributes are new.

   - `address-lookup-label`—Sets an accessible label for the optional address lookup field. Visible when the `show-address-lookup` attribute is present.

   - `locale`—Sets the order of the input fields based on a specific locale. Default value is `en_US`. For the list of supported locales, see Supported Number, Name, and Address Formats (ICU).

`lightning-progress-bar`
   This attribute is new.

   - `aria-label`—Sets an accessible label for the component.

Changes to Time Formatting

These components now parse all ISO8601 formatted time strings as Universal Time (UTC).

`lightning-formatted-date-time`

`lightning-formatted-time`

`lightning-input`

Changes to Component Use Off-Platform

Previously, if you used these components off the Salesforce platform, the components formatted date, time, and currency for the `en-US` locale only. Now, these components output localized date, time, and currency formatting when used off-platform, based on the user's device locale.

`lightning-formatted-date-time`

`lightning-formatted-number`

`lightning-formatted-time`

`lightning-input`

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.

`experience/cmsDeliveryApi`
    This module includes a new wire adapter for retrieving content from an enhanced CMS workspace to use in an enhanced LWR site.

- `getContent`—Retrieves published content from enhanced CMS workspaces.

    See Create Custom Components to Retrieve Enhanced CMS Content.

`experience/cmsEditorApi`
    This module includes new wire adapters and methods for working with the content editor in an enhanced CMS workspace.

    The new wire adapters are:

- `getContent`—Retrieves the `title`, `urlName`, and `contentBody` of the content item based on the content type—image, news, document, or custom content.
- `getContext`—Retrieves metadata that provides contextual information about the content item in the CMS content editor.

    The new method is:

- `setContent`—Updates the title and `contentBody` of the content item in the editor.

```
import { LightningElement, wire } from 'lwc';
import { getContext }  from 'experience/cmsEditorApi';
export default class Example extends LightningElement {
    @wire(getContext, {})
```

```
        context;
}
```

See Use Sidebar Extensions in the Revamped Content Editor in Enhanced CMS Workspaces.

lightning/fileDownload

Enables file downloads from custom components in LWR sites. Generates a URL that lets users download Salesforce files, attachments, and documents from desktop and mobile devices.

See Offer Your Users Easy File Downloads from Custom Components.

lightning/modal

This module includes a new library used to create the new modal component.

* `LightningModal`— Extend this component instead of `LightningElement` to create a modal. `LightningModal` gives your component access to the normal LWC resources and the special modal container, helper components, methods, and events.

```
/* c/myModal.js */
import LightningModal from 'lightning/modal';

export default class MyModal extends LightningModal {
    /* component content */
}
```

See Create Overlays with the New Modal Component.

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 CRM Analytics data.

The new methods are:

* `createDataset`—Generates a new CRM Analytics dataset.
* `deleteDataConnector`—Deletes a specific CRM Analytics data connector by data connector ID.
* `updateXmd`—Updates the extended metadata (Xmd) for Xmd of type `User`.

Use these methods to create CRM Analytics datasets and make updates to other analytics data.

```
import { LightningElement, api, wire } from 'lwc';
import { createDataset } from 'lightning/analyticsWaveApi';
import { ShowToastEvent } from 'lightning/platformShowToastEvent';

export default class CreateDataset extends LightningElement {
  dataset = {
      "label" : "My New Dataset",
      "description" : "New dataset",
      "name" : "new_dataset",
      "datasetType" : "default"
  }

  create(event) {
    createDataset({ dataset: this.dataset })
    .then(() => {
      this.dispatchEvent(
```

```
      new ShowToastEvent({
        title: 'Success',
        message: 'Dataset created',
        variant: 'success'
      })
    );
  })
  .catch(error => {
    this.dispatchEvent(
      new ShowToastEvent({
        title: 'Error creating dataset',
        message: error.body.message,
        variant: 'error'
      })
    );
  });
  }
}
```

`lightning/uiRecordApi`

This module includes deprecated wire adapters and functions. The deprecation was first announced in Summer '22.

- `getRecordUi` (Deprecated)—Support for this wire adapter ends on May 1, 2023. We recommend using the `lightning-record-form`, `lightning-record-edit-form`, and `lightning-record-view-form` base components to enable users to work with records. Retrieving a layout using an alternative wire adapter isn't currently supported. Consider requesting for specific or optional fields 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.

- `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. The deprecation was first announced in Summer '22.

`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.

`@salesforce/i18n`

The internationalization module has 14 new properties.

- `calendarData`—Calendar formats for the user's locale.

- `defaultCalendar`—Default calendar format based on locale.

- `defaultNumberingSystem`—Default numbering system based on locale.

- `common.digits`—Unicode characters for numerical values.

- `common.calendarData`—Supplementary calendar data for common calendar formats.

- `dateTime.longDateTimeFormat`—Long style datetime format.

- `number.percentSign`—Percent sign symbol.

- `number.plusSign`—Plus sign symbol.

- `number.minusSign`—Minus sign symbol.

- `number.exponentialSymbol`—Exponential symbol.
- `number.superscriptExponentSign`—Superscript exponent symbol
- `number.perMilleSign`—Per mille symbol.
- `number.infinity`—Infinity symbol.
- `Number.nan`—String for "Not a Number."

SEE ALSO:

Create Overlays with the New Modal Component

Lightning Web Components Developer Guide: Work with Records Using Base Components

Lightning Web Components Developer Guide: `@salesforce` Modules

Lightning Web Components Developer Guide: Access Internationalization Properties

Unicode Locale Data Markup Language

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

These components have changed.

`lightning:button`

This attribute is new.

- `stretch`—Expands the button to the available width when set to `true`. Default value is `false`.

`lightning:inputAddress`

These attributes are new.

- `addressLookupLabel`—Sets an accessible label for the optional address lookup field. Visible when the `showAddressLookup` attribute is set to `true`.
- `locale`—Sets the order of the input fields based on a specific locale. Default value is `en_US`. For the list of supported locales, see Supported Number, Name, and Address Formats (ICU).

`lightning:progressBar`

This attribute is new.

- `ariaLabel`—Sets an accessible label for the component.

`lightning:utilityBarApi`

These attributes are new for the `setPanelWidth` method.

- `durationMs`— Optional. A fixed transition time in milliseconds for panel width changes. Default value is `0`.
- `timingFunction`— Optional. A transition timing function to set the rate for panel width changes. Supports any CSS easing function supported by your target browser. Default value is `ease`.
- `delayMs`— Optional. The wait time in milliseconds before the width transition starts. Default value is `0`.

These attributes are new for the `setPanelHeight` method.

- `durationMs`— Optional. A fixed transition time in milliseconds for panel height changes. Default value is `0`.
- `timingFunction`— Optional. A transition timing function to set the rate for panel height changes. Supports any CSS easing function supported by your target browser. Default value is `ease`.

- `delayMs`— Optional. The wait time in milliseconds before the height transition starts. Default value is `0`.

Changes to Time Formatting

These components now parse all ISO8601 formatted time strings as Universal Time (UTC).

`lightning:formattedDateTime`

`lightning:formattedTime`

`lightning:input`

Changes to Component Use Off-Platform

Previously, if you used these components off the Salesforce platform, the components formatted date, time, and currency for the en-US locale only. Now, these components output localized date, time, and currency formatting when used off-platform, based on the user's device locale.

`lightning:formattedDateTime`

`lightning:formattedNumber`

`lightning:formattedTime`

`lightning:input`

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 on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

Auth Namespace

The Auth namespace has these changed classes.

DataWeave Namespace

The DataWeave namespace provides these new classes, methods, and exception to support the invocation of DataWeave scripts from Apex.

FieldService Namespace

The FieldService namespace has these changed classes.

LxScheduler Namespace

The LxScheduler namespace has these new methods.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Invocable Namespace (Generally Available)

The new Invocable namespace is used for calling invocable actions. It has these classes and methods.

SEE ALSO:

Apex: New Features

Auth Namespace

The Auth namespace has these changed classes.

New or Changed Methods in Existing Classes

The `AuthConfiguration (networkId, startUrl)` constructor is deprecated in API version 56.0 and later.

Use the `AuthConfiguration (communityOrCustomUrl, startUrl)` constructor instead.

DataWeave Namespace

The DataWeave namespace provides these new classes, methods, and exception to support the invocation of DataWeave scripts from Apex.

New Classes

Retrieve the transformed data

Use the `getValue()` and `getValueAsString()` methods in the `DataWeave.Result` class.

Load DataWeave scripts and obtain transformed data

Use the `createScript()` and `execute()` methods in the `DataWeave.Script` class.

New Exceptions

Catch runtime script exceptions within DataWeave

Use the `System.DataWeaveScriptException` exception.

FieldService Namespace

The FieldService namespace has these changed classes.

Changed Methods in Existing Classes

Take advantage of these synchronous Apex methods for scheduling with Enhanced Scheduling and Optimization (ESO) in API version 56.0 and later. When ESO isn't enabled, these services remain asynchronous.

The following Field Service Apex methods now support synchronous operations: `ScheduleService.scheduleExtended()`, `AppointmentBookingService.getSlots()`, `AppointmentBookingService.getABSlots()`, `GradeSlotsService.getGradedMatrix()`. Also, `ScheduleResult.longOperationId` and `AdvancedGapMatrix.FSLOperationId` aren't required when ESO is enabled.

LxScheduler Namespace

The LxScheduler namespace has these new methods.

New Methods in Existing Classes

Filter the availability of appointment slots and service resources based on the engagement channel type selected

Use the new `setEngagementChannelTypeIds(engagementChannelTypeIds)` method in the `lxscheduler.GetAppointmentCandidatesInputBuilder` and `lxscheduler.GetAppointmentSlotsInputBuilder` classes.

SEE ALSO:

Salesforce Scheduler Developer Guide: LxScheduler Namespace (can be outdated or unavailable during release preview)

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Write clear and intentional assertions

Use the new `System.Assert` class, which includes these methods.

- `Assert.areEqual()`
- `Assert.areNotEqual()`
- `Assert.fail()`
- `Assert.isFalse()`
- `Assert.isInstanceOfType()`
- `Assert.isNotInstanceOfType()`
- `Assert.isNotNull()`
- `Assert.isNull()`
- `Assert.isTrue()`

New or Changed Methods in Existing Classes

Generate a message identifier to send case-related emails and match the email and its replies to a case

Use the new `generateThreadingMessageId(caseId)` in the `System.Cases` class.

Get the name, current value, and maximum value of an org limit

Use the `OrgLimit.toString()` method.

Specify whether certain database operations run in user mode or system mode (beta)

Use the new overloaded DML methods in the `System.Database` class. The new methods add a parameter, `accessLevel`, to specify the execution mode. An example of a new method is `Database.insertImmediate(sobject, accessLevel)`. These methods have new overloads.

- `Database.getQueryLocator()`
- `Database.deleteAsync()`
- `Database.deleteImmediate()`
- `Database.insertAsync()`
- `Database.insertImmediate()`
- `Database.updateAsync()`

- `Database.updateImmediate()`

SEE ALSO:

Other Improvements to Email-to-Case

Apex Reference Guide: generateThreadingMessageId(caseId) (can be outdated or unavailable during release preview)

Invocable Namespace (Generally Available)

The new Invocable namespace is used for calling invocable actions. It has these classes and methods.

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 pre-existing list of invocations.

228

Return the invocable action

The `Invocable.Action.Result.getAction()` method returns the action that was invoked and caused a result to be returned.

Provides error information from invocable actions called from Apex code

The new `Invocable.Action.Error` class has these methods.

Get the error code returned by an invocable action

The `Invocable.Action.Error.getCode()` method returns a string containing an error code returned by an invocable action.

Get the error message returned by an invocable action

The `Invocable.Action.Error.getMessage()` method returns a string containing the error message returned by an invocable action.

Provides results from invocable actions called from Apex code

The new `Invocable.Action.Result` class has these methods.

Get a list of the parameter values set for an invocable action

The `Invocable.Action.Result.getInvocationParameters()` method returns a list that contains the input parameter values for each invocation of an action. Each map in the list contains a key for the name of each input parameter.

Get a list of the parameter values returned by an invocable action

The `Invocable.Action.Result.getOutputParameters()` method returns a list that contains the result for each invocation of an action. Each map in the list contains a key for the name of each output parameter.

Determine if an invocable action ran without errors

The `Invocable.Action.Result.isSuccess()` method returns true when the invocable action ran successfully.

Get errors that were returned by an invocable action

The `Invocable.Action.Result.getErrors()` method returns a list of `Invocable.Action.Error` objects.

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

Create custom experiences in Salesforce using Connect in Apex. Work with new commerce and named credentials features. Take advantage of site search and enhanced CMS workspaces, which are now generally available.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. We refer to the `ConnectApi` namespace as *Connect in Apex.*

IN THIS SECTION:

New and Changed Connect in Apex Classes

These classes are new or changed.

Changed Connect in Apex Input Classes

These input classes have changes.

Changed Connect in Apex Output Classes

These output classes have changes.

SEE ALSO:

Connect REST API

Apex Reference Guide: ConnectApi Namespace

Connect REST API Developer Guide

Improved Security for Connect APIs

New and Changed Connect in Apex Classes

These classes are new or changed.

Commerce

This new method is in the `ConnectApi.CommerceBuyerExperience` class.

Get price adjustment details from order summaries

- `getOrderItemSummaries(webstoreId, effectiveAccountId, orderSummaryId, orderDeliveryGroupSummaryId, fields, pageParam, pageSize, sortParam, includeAdjustmentDetails)`

This new method is in the in the `ConnectApi.CommerceCatalog` class.

Get detailed information for a product, optionally including information about its product selling models

- `getProduct(webstoreId, productId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia, excludeEntitlementDetails, excludePrimaryProductCategory, excludeVariationInfo, excludeAttributeSetInfo, excludeQuantityRule, excludeProductSellingModels)`

This new method is in the in the `ConnectApi.CommerceStorePricing` class.

Get a product's list and buyer price for specified product selling models

- `getProductPrice(webstoreId, productId, effectiveAccountId, productSellingModelIds)`

This new method is in the `ConnectApi.OrderSummary` class.

Create invoices for one or more change orders

- `createMultipleInvoices(invoicesInput)`

  New input class: `ConnectApi.CreateMultipleInvoicesFromChangeOrdersInputRepresentation`

  New output class: `ConnectApi.CreateMultipleInvoicesFromChangeOrdersOutputRepresentation`

This new method is in the `ConnectApi.OrderSummary` class.

Ensure and apply funds for multiple invoices

- `multipleEnsureFundsAsync(multipleEnsureFundsInput)`

  New input class: `ConnectApi.MultipleEnsureFundsAsyncInputRepresentation`

  New output class: `ConnectApi.MultipleAsyncOutputRepresentation`

Customer Data Platform

Get an ordered batch of segments

- `getSegmentsPaginated(batchSize, offset, orderBy)`

Einstein Bots

These new methods are in the `ConnectApi.BotVersionActivation` class.

Get the active or inactive status of the bot version

- `getVersionActivationInfo(botVersionId)`

New output class: `ConnectApi.BotVersionActivationInfo`

This method is available in version 50.0 and later, but was previously undocumented.

Update the status of the specified bot version

- `updateVersionStatus(botVersionId, status, postBody)`

New input class: `ConnectApi.BotVersionActivationInput`

New output class: `ConnectApi.BotVersionActivationInfo`

This method is available in version 50.0 and later, but was previously undocumented.

This new method is in the `ConnectApi.ConversationApplicationDefinition` class.

Get information about an integration's conversation application definition and the associated bot

- `getConversationApplicationDefinition(integrationName)`

New output class: `ConnectApi.ConversationApplicationDefinitionDetailRespresentation`

This method is available in version 54.0 and later, but was previously undocumented.

Named Credentials

These new methods are in the new `ConnectApi.NamedCredentials` class.

Create a credential

- `createCredential(requestBody)`

New input class: `ConnectApi.CredentialInput`

New output class: `ConnectApi.Credential`

Get a credential

- `getCredential(externalCredential, principalName, principalType)`

New output class: `ConnectApi.Credential`

Update a credential

- `updateCredential(requestBody)`

New input class: `ConnectApi.CredentialInput`

New output class: `ConnectApi.Credential`

Delete a credential

- `deleteCredential(externalCredential, principalName, principalType)`

Get the URL for the OAuth token flow for an external credential

- `getOAuthCredentialAuthUrl(requestBody)`

New input class: `ConnectApi.OAuthCredentialAuthUrlInput`

New output class: `ConnectApi.OAuthCredentialAuthUrl`

Get external credentials that the user can authenticate to

- `getExternalCredentials()`

New output class: `ConnectApi.ExternalCredentialList`

Get an external credential, including the named credentials and principals associated with it and the type and status of each principal

- `getExternalCredential(developerName)`

New output class: `ConnectApi.ExternalCredential`

Site Search and Enhanced CMS Workspaces (Generally Available)

This method in the `ConnectApi.ManagedContent` class, previously available in beta, is generally available.

- `getManagedContentSpace(contentSpaceId)`

These new methods are in the `ConnectApi.ManagedContentDelivery` class.

Get collection items for a channel

- `getCollectionItemsForChannel(channelId, collectionKeyOrId)`

New output class: `ConnectApi.ManagedContentCollectionItems`

Get collection items for an Experience Cloud site

- `getCollectionItemsForSite(siteId, collectionKeyOrId)`

New output class: `ConnectApi.ManagedContentCollectionItems`

These methods in the `ConnectApi.ManagedContentDelivery` class, previously available in beta, are generally available.

- `getManagedContentChannel(channelId)`
- `getManagedContentForChannel(channelId, contentKeyOrId, showAbsoluteUrl)`
- `getManagedContentForChannel(channelId, contentKeyOrId, language, showAbsoluteUrl)`
- `getManagedContentForChannel(channelId, contentKeyOrId, language, showAbsoluteUrl, referenceDepth, expandReferences, referencesAsList)`
- `getManagedContentForSite(siteId, contentKeyOrId, showAbsoluteUrl)`
- `getManagedContentForSite(siteId, contentKeyOrId, language, showAbsoluteUrl)`
- `getManagedContentForSite(siteId, contentKeyOrId, language, showAbsoluteUrl, referenceDepth, expandReferences, referencesAsList)`
- `getManagedContentsForChannel(channelId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`
- `getManagedContentsForSite(siteId, managedContentIds, contentKeys, contentTypeFQN, language, publishStartDate, publishEndDate, includeContentBody, referenceDepth, expandReferences, referencesAsList, pageParam, pageSize)`

This method in the `ConnectApi.Sites` class, previously available in beta, is generally available.

- `searchSite(siteId, queryTerm, pageToken, pageSize, language)`

Changed Connect in Apex Input Classes

These input classes have changes.

Salesforce Scheduler

`ConnectApi.ServiceAppointmentInput`
    This input class has this new property.

- `engagementChannelTypeId`—ID of the engagement channel type to associate with the appointment.

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

`ConnectApi.EnsureFundsAsyncOutputRepresentation`
    This output class has this property removed and now inherits it from the new ConnectApi.BaseAsyncOutputRepresentation abstract output class.

- `backgroundOperationId`—ID of the background operation.

`ConnectApi.EnsureRefundsAsyncOutputRepresentation`
    This output class has this property removed and now inherits it from the new ConnectApi.BaseAsyncOutputRepresentation abstract output class.

- `backgroundOperationId`—ID of the background operation.

`ConnectApi.ProductDetail`
    This output class has this new property.

- `productSellingModels`—List of product selling models for the product.

`ConnectApi.ProductPrice`
    This output class has this new property.

- `productPriceEntries`—List of line item prices for the product.

`ConnectApi.ReturnItemsOutputRepresentation`
    This output class has this new property.

- `feeChangeOrderId`—ID of the change order created by processing the ReturnOrderLineItems representing return fees. Use this change order to create an invoice.

Customer Data Platform

`ConnectApi.CdpSegmentContainerOutput`
    This output class has these new properties.

- `batchSize`—Number of items returned.
- `offset`—Number of rows skipped before returning results.
- `orderByExpression`—Expression indicating how results are ordered.

ConnectApi.CdpSegmentOutput

This output class has these new properties.

- `apiName`—API name of the segment.
- `lookalikeCriteria`—Reserved for future use.
- `marketSegmentId`—ID of the market segment.
- `segmentMembershipTable`—Name of the segment membership table.
- `segmentOnApiName`—API name of the SegmentOn entity.
- `segmentType`—Type of segment.

Experience Cloud Sites

ConnectApi.Community

This output class has these new properties.

- `builderUrl`—Experience Builder URL for the site.
- `imageOptimizationCDNEnabled`—Specifies whether images are optimized for guest users on all devices for sites using Salesforce's CDN for Digital Experiences (`true`) or not (`false`).

Salesforce Payments

ConnectApi.PostAuthGatewayResponse

This output class has this new property.

- ConnectApi.PaymentMethodDetails–Details about the payment method.

ConnectApi.PaymentMethodOutput

This output class has this new property.

- ConnectApi.PaymentMethodDetails–Details about the payment method.

API: New and Changed Items

Access more data objects and metadata types in API version 56.0.

IN THIS SECTION:

New and Changed Objects

Access more data through these new and changed standard objects.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Work with new commerce, named credentials, and survey features. Take advantage of site search and enhanced CMS workspaces, which are now generally available.

CRM Analytics REST API

Use the CRM Analytics REST API to retrieve datasets by create and queried dates. Retrieve new recipe nodes, filter connected datasets by `includeLive`, and use the new Input Step in dashboards.

Einstein Discovery REST API

Using the Einstein Discovery REST API, retrieve importance metrics for Einstein Discovery AI models and historical predictions.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

The methods available for the Salesforce Order Management (SOM) object PendingOrderSummary are determined by the API. Information about query limitations is available in the Salesforce Platform Object Reference.

Apex Methods Available for Pending Order Summary

PendingOrderSummary only supports these methods in this release.

- Database.query(queryString)
- Database.query(queryString, accessLevel)

SOAP API Methods Available for Pending Order Summary

PendingOrderSummary only supports these methods in this release.

- create()
- delete()
- describeLayout()
- query()
- queryMore()

REST API Methods Available for Pending Order Summary

PendingOrderSummary only supports these methods in this release.

- /services/data/vXX.X/sobjects/sObject/ GET

- /services/data/vXX.X/sobjects/sObject/id/ GET

- /services/data/vXX.X/sobjects/sObject/id/ DELETE

- /services/data/vXX.X/sobjects/sObject/id/ POST

- /services/data/vXX.X/sobjects/sObject/describe/compactLayouts/ GET

- /services/data/vXX.X/sobjects/sObject/quickActions/

Analytics

Perform faster dataset updates with incremental mode
Use the new `MODE` field on the InsightsExternalData object to perform incremental updates on Analytics datasets.

See more details about saved views and dashboard pages usage
Use the `VIEW_MODE` field on the Wave Change, Wave Interaction, and Wave Performance event types to identify the current view mode. Use the `SAVED_VIEW_ID` and `PAGE_ID` on the Wave Change event type to track changes to saved views and dashboard pages.

Budget Management

Relate a budget to a parent budget
Use the new `ParentBudgetId` field in the Budget object.

Objects now available in Experience Cloud
POWER_PARTNER and POWER_CUSTOMER_SUCCESS (Community Plus) users can use the Budget and BudgetAllocation objects.

Commerce

Assign a tax rate to a country to support global sales
Use the new `TaxRate` and `GeoCountry` objects. You can define only one tax rate per country and tax code combination.

Exclude qualifying items from discounts
Use the new `AreQualItemsExclFromDiscounts` field on the Promotion object.

Limit the number of times a promotion can apply to a cart
Use the new `MaximumUsageCount` field on the Promotion object.

Limit the number of times a promotion can apply to a product
Use the new `RestrictionQuantity` field on the PromotionTarget object.

Require customers to meet a quantity limit to receive a discount
Use the new `IsMinItemCountRequired` field on the PromotionTarget object.

Offer products for a promotional price
Use the new `FixedPrice` and `TotalFixedPrice` picklist values in the `AdjustmentType` field on the PromotionTarget object.

Discount a fixed amount off a transaction
Use the new `FixedAmountOfTransaction` picklist value in the `AdjustmentType` field on the PromotionTarget object.

Add external discount targets and qualifiers to a promotion

Use the `ExternalTarget` field on the PromotionTarget object.

Use the `ExternalQualifier` field on the PromotionQualifier object.

Include fees in Orders

Use the new `TotalAdjFeeAmtWithTax`, `TotalAdjustedFeeAmount`, `TotalAdjustedFeeTaxAmount`, `TotalFeeAdjDistAmount`,`TotalFeeAdjDistAmtWithTax`,`TotalFeeAdjDistTaxAmount`,`TotalFeeAmount`, `TotalFeeAmountWithTax`, and `TotalFeeTaxAmount` fields on the OrderSummary object.

Use the new supported value `Fee` in the existing `Type` field on the OrderItem object.

Use the new supported value `Fee` in the existing `Type` field on the OrderItemSummary object.

Include fees in Return Orders

Use the new `TotalFeeAdjustAmount`, `TotalFeeAdjustAmtWithTax`, `TotalFeeAdjustTaxAmount`, `TotalFeeAmount`, `TotalFeeAmtWithTax`, and `TotalFeeTaxAmount` fields on the ReturnOrder object.

Use the new supported value `Fee` in the existing `Type` field on the ReturnOrderLineItem object.

Include fees in Fulfillment Orders

Use the new `TotalFeeAdjustAmount`, `TotalFeeAdjustAmtWithTax`, `TotalFeeAdjustTaxAmount`, `TotalFeeAmount`, `TotalFeeAmtWithTax`, and `TotalFeeTaxAmount` fields on the FulfillmentOrder object.

Use the new supported value `Fee` in the existing `Type` field on the FulfillmentOrderLineItem object.

Mark a Fulfillment Order as Rejected

Use the new supported value `Rejected` in the existing `Status` field and the new supported value `Rejected` in the existing `StatusCategory` field on the FulfillmentOrder object.

Use the new `RejectReason` field on the FulfillmentOrderLineItem object.

Mark a Fulfillment Order as Printed or Pick Complete

Use the new supported values `Printed` and `Pick Complete` in the existing `Status` field on the FulfillmentOrder object.

Uniquely identify B2C Commerce orders

Use the new `OrderManagementReferenceIdentifier` field on the Order object and the updated `ExternalReferenceIdentifier` field on the OrderSummary object.

Access B2C Commerce order data ingested by High Scale Orders before the OrderSummary is created

Use the new PendingOrderSummary object.

Customization

REMOVED: `OptionsExternalHttps` field on the Domain object is removed

The `OptionsExternalHttps` field on the Domain object is removed in API version 56.0 and later. To serve your domain over HTTPS with an external host, use the `ExternalHttps` picklist value in the `HttpsOption` field.

REMOVED: `OptionsHstsHeaders` field on the Domain object is removed

The `OptionsHstsHeaders` field on the Domain object is removed in API version 56.0 and later. HTTPS was enforced in API 52.0 (Summer '21).

Development

Get the execution state of an event relay from Salesforce to Amazon EventBridge for platform events and change data capture events

Query EventRelayFeedback to get event relay information such as the event relay status and any error message.

Enterprise Territory Management

Access territory management settings and defaults for a particular object
> Use the new TerritoryMgmtObjectConfig object.

Set the sharing access level of objects assigned to a particular territory
> Use the new Territory2ObjSharingConfig object.

Event Monitoring

Get information about your connections with Salesforce Connect adapters for Amazon DynamoDB and Amazon Athena
> Use the new `ExternalDataSourceCallout` event type.

Identify the My Domain hostnames that Salesforce redirects for you
> Use the new `HostnameRedirects` event type.

BEHAVIOR CHANGE: The Records field on the `APIEventStream` object is now set to a null value for Bulk API queries
> Bulk API queries from `ApiEventStream` can exceed bandwidth limitations due to the size of the `Records` field. To reduce the payload size, the `Records` field is set to a null value.

Experience Cloud

Optimize cached images for guest users on all devices when you use Salesforce's CDN for Digital Experiences
> Use the new `enableImageOptimizationCDN` field on the Network object.

Create and get information about managed content in a Salesforce CMS workspace
> Use the new ManagedContent object.

Create and get information about a Salesforce CMS Channel
> Use the new ManagedContentChannel object. Generally available in API version 55.0, this object has been added to the *Object Reference Guide*.

Create and get information about managed content variants from a Salesforce CMS workspace
> Use the new ManagedContentVariant object.

Create and get information about a Salesforce CMS workspace
> Use the new ManagedContentSpace object. Generally available in API version 56.0, this object has been added to the *Object Reference Guide*.

Cache public data from Apex methods for guest users for sites using Salesforce's CDN for Digital Experiences
> Use the new `enableApexCDNCaching` field on the Network object.

Field Service

Add travel mode for travel time calculations
> Use the new Travel Mode object. Generally available in API version 54.0, this object has been added to the *Object Reference Guide*.

BEHAVIOR CHANGE: The `FSL__Schedule_Mode__c` custom field is now an unrestricted picklist with additional values for Enhanced Scheduling and Optimization
> With Enhanced Scheduling and Optimization enabled, the `FSL__Schedule_Mode__c` custom field on the ServiceAppointment object now includes the Drag and Drop, Schedule, Global Optimization, In-Day Optimization, and Resource Optimization scheduling operation values. See the Field Service Developer Guide.

Support for Duration Calculation Fields
> Use the Duration Calculation fields on the ApptBundlePolicy object: IsTimeCalcByBundleDurationFld, BundleEndTimeFieldName, BundleStartTimeFieldName, and ConstantTimeValue. Generally available in API version 56.0, this object has been updated in the *Object Reference Guide*.

Files

Get information about a file version

Use the new `VersionDataURL` field on the ContentVersion object. Generally available in API version 55.0, this field has been added to the *Object Reference Guide*.

Functions

See the prefix of the namespace that invokes the function

Use the new `InvokingNamespacePrefix` field on the FunctionInvocationRequest object.

Reference details about an image associated with a function

Use the new `ImageReference` field on the FunctionReference object.

Mobile

Query information about related briefcase rules

Use the new `ParentRuleId`, `RelationshipField`, and `RelationshipType` fields on the existing BriefcaseRule object. Generally available in API version 55.0, these fields have been added to the *Object Reference Guide*.

Revenue

REMOVED: ErrorPosting value on the Status field on the Invoice object is replaced with Error value

The `Error Posting` value on the `Status` field on the Invoice object is removed and replaced with the `Error` value in API version 56.0 and later. If your org contains invoices with the status `Error Posting`, contact Salesforce Support for more information.

REMOVED: Update property on the InvoiceBatchRunId field on the Invoice object is removed

The `InvoiceBatchRunId` field on the Invoice object is now a read-only field that can be filtered, grouped, set to null, and sorted. Previously, users also could update the field.

Determine which pricing to use when an asset's quantity is increased

Use the new `QuantityIncreasePricingType` field on the Asset object to specify the pricing when an asset's quantity is increased.

Use the Renewal Pricing Type field to indicate when a subscription for an asset is renewed

The UI label for the `RenewalPricingType` field on the Asset object was changed from Renewal Pricing Type to the Pricing Type for Renewal; the API field name `RenewalPricingType` remains unchanged.

Schedule recurring payments for an invoice

Use the new PaymentSchedulePolicy, PaymentScheduleTreatment, PaymentScheduleTreatmentDtl, and PymtSchdDistributionMethod objects.

Create price adjustments for subscription quotes

Use the new QuoteLinePriceAdjustment object.

See when an invoice line item is for a fee on the ReferenceEntityItemType field on InvoiceLineItem

Use the new value *Fee* on the `ReferenceEntityItemType` on the InvoiceLineItem object.

REMOVED: The `AppType` field on the CreditMemo object is removed in API version 56.0

Product information is no longer indicated on the credit memo.

Understand when a credit memo contains an error

Use the new supported value `Error` in the existing `Status` field on the CreditMemo object.

Understand when a credit memo is created from a negative invoice line conversion

Use the new supported value `NegativeInvoiceLineConversion` in the existing `SourceAction` field on the CreditMemo object.

Understand the credit amount that was created by converting a negative invoice line amount

Use the new `ConvertedNegAmount` field on the InvoiceLine object.

See the sum of negative invoice lines that were converted to a credit memo

Use the new `TotalConvertedNegAmount` field on the Invoice object.

Learn which contact a Subscription Management quote is billed to

Use the new `BillToContactId` field on the Quote object.

Use the revenue transaction error log with additional types of transactions

The `Category` field on the RevenueTransactionErrorLog object contains additional types.

Create quotes for products that are sold on subscription

Use the new `NetTotalPrice`, `TotalLineAmount`, and `TotalAdjustmentAmount` fields on the QuoteLineItem object.

See summarized info about invoice runs in Subscription Management on the Invoice Batch Run object

Use the new field `TotalBsSuccessfullyProcessed` to see the count of billing schedules that were successfully processed and used to generate invoices during the invoice batch run.

Use the new field `TotalBillingSchedulesFailed` to see the count of billing schedules that weren't successfully processed during the invoice batch run.

Use the new field `TotalFilteredBillingSchedules` to see the count of billing schedules that met the criteria configured for the invoice batch run.

Use the new field `TotalInvSuccessfullyProcessed` to see the count of invoices that were generated during the invoice batch run.

Use the new field `TotalInvoicedAmount` to see the summarized amount of revenue represented by the invoices generated during the invoice batch run.

Use the new field `TotalInvoicesFailed` to see the count of invoices that weren't successfully generated.

Use the new field `TotalInvoicesGenerated` to see the count of invoices that were successfully generated.

Use the new field `RecoveryStatus` to see the state of the invoice batch run recovery process.

Deploy and view scheduler configurations invoice batch runs and payment batch runs

Use the BillingBatchScheduler object. Introduced in API version 55.0, this type has been added to the *Object Reference Guide*.

Enjoy more scheduling flexibility when configuring invoice and payment schedulers on the BillingBatchScheduler object

Use the new *Daily* and *Weekly* values on the `FrequencyCadence` field to configure a scheduler to recur on daily or weekly intervals, respectively.

Use the new field `RecurringType` to specify the frequency at which the scheduler recurs when the `FrequencyCadence` is set to *Weekly*.

Use the new field `RecurringSubType` to specify the frequency at which the scheduler recurs when the `FrequencyCadence` is set to *Monthly*.

Use the new field `RecursOn` to specify the interval at which the scheduler triggers a batch processing job when the `FrequencyCadence` is set to *Monthly*.

Use the new field `RecursOnDay` to specify the date on which the scheduler triggers a batch processing job.

Use the new field `RecursOnDate` to specify the date on which the schedule triggers a batch processing job.

Use the new field `NextRunTime` to see the next date and time when the invoice batch run or payment batch run is scheduled to occur.

Show quantity amendment orders on the BillingSchedule object

Use the new value *AmendQuantity* on the `Category` field to indicate when an order is a quantity amendment.

Update a payment term on the BillingScheduleGroup object

Use the Update property on the `PaymentTermId` field to change the field on the BillingScheduleGroup object.

Sales

Create custom calculated forecast columns and manage translation

Use the new ForecastingColumnDefinition and ForecastingColumnDefinitionLocalization objects.

Create longer forecast adjustment notes

The `AdjustmentNote` field in the ForecastingAdjustment object and `OwnerAdjustmentNote` in the ForecastingOwnerAdjustment object contain up to 255 characters. Previously, the character limit was 140 characters.

Define Fields for Summarizing Pipeline Inspection Metrics

Use the new PipelineInspectionSumField object to specify amount, number, or currency fields that users can select to summarize pipeline metrics.

Identify the Field Used to Summarize Pipeline Metrics in a Pipeline Inspection View

Use the `SummaryField` field on the PipelineInspectionListView object to see which opportunity field is specified as the field to summarize pipeline metrics on a specific pipeline view.

Create more activity and task subtypes

Use the new `LinkedIn` picklist value in the existing `ActivitySubtype` field on the ActivityHistory, LookedUpFromActivity, and OpenActivity objects. We also added the `LinkedIn` picklist value to the existing `TaskSubtype` field on the Task object.

Identify the flows associated with Sales Engagement cadence steps

Use the new `StepAutomationReference`, `IsStepAutomationActive`, and `TypeDetail` fields on the ActionCadenceStep object.

Identify flows that can be associated with Sales Engagement cadence steps

Use the new `ActionCadenceAutolaunchedFlow` and `ActionCadenceStepFlow` picklist values for the `ProcessType` field on the FlowDefinitionView and FlowVersionView objects.

Associate a broadcast topic with collaboration rooms

Use the new BroadcastTopic object.

Salesforce Flow

View the description of a flow test associated with a flow definition (Generally Available)

Use the new FlowTestView object. For more details, see Test One, Two, Three, Flow (Generally Available)

View the results for a flow test associated with a flow version (Generally Available))

Use the new FlowTestResult object. For more details, see Test One, Two, Three, Flow (Generally Available)

Get information about a customer's responses to a presented offer or recommendation for Einstein Next Best Action

Use the RecommendationResponse object. Introduced in API version 51.0, this object has been added to the Object Reference for the Salesforce Platform. For more details, see RecommendationResponse

View the owner sharing rule of an orchestration instance.

Use the new FlowOrchestrationInstanceSharingRule object.

View the sharing entry of an orchestration instance.

Use the new FlowOrchestrationInstanceShare object.

View the ID of the owner of an orchestration instance.
Use the new `OwnerId` field on the FlowOrchestrationInstance object.

View the owner sharing rule of an orchestration stage instance.
Use the new FlowOrchestrationInstanceStageSharingRule object.

View the sharing entry of an orchestration stage instance.
Use the new FlowOrchestrationStageInstanceShare object.

View the ID of the owner of an orchestration stage instance.
Use the new `OwnerId` field on the FlowOrchestrationStageInstance object.

View the owner sharing rule of an orchestration step instance.
Use the new FlowOrchestrationStepInstanceSharingRule object.

View the sharing entry of an orchestration step instance.
Use the new FlowOrchestrationStepInstanceShare object.

View the ID of the owner of an orchestration step instance.
Use the new `OwnerId` field on the FlowOrchestrationStepInstance object.

View the owner sharing rule of an orchestration work item.
Use the new FlowOrchestrationWorkItemSharingRule object.

View the sharing entry of an orchestration work item.
Use the new FlowOrchestrationWorkItemShare object.

View the ID of the owner of an orchestration work item.
Use the new `OwnerId` field on the FlowOrchestrationWorkItem object.

Get information about which environments a flow can run in.
Use the `Environments` field, which is on the FlowDefinitionView object. Introduced in API version 55.0, this field has been added to the Object Reference for the Salesforce Platform.

View whether a scheduled path runs asynchronously after a save.
Use the `HasAsyncAfterCommitPath` field, which is on the FlowDefinitionView object. Introduced in API version 54.0, this field has been added to the Object Reference for the Salesforce Platform.

View whether a flow is overridable.
Use the `IsOverridable` field, which is on the FlowDefinitionView object. Introduced in API version 53.0, this field has been added to the Object Reference for the Salesforce Platform.

View the flow that's overriding the current flow.
Use the `OverriddenById` field, which is on the FlowDefinitionView object. Introduced in API version 53.0, this field has been added to the Object Reference for the Salesforce Platform.

View the flow that the current flow is overriding.
Use the `OverriddenFlowId` field, which is on the FlowDefinitionView object. Introduced in API version 53.0, this field has been added to the Object Reference for the Salesforce Platform.

View what type of record changes can start the flow.
Use the `RecordTriggerType` field, which is on the FlowDefinitionView object. Introduced in API version 54.0, this field has been added to the Object Reference for the Salesforce Platform.

View the template that the current flow was created from.
Use the `SourceTemplateId` field, which is on the FlowDefinitionView object. Introduced in API version 53.0, this field has been added to the Object Reference for the Salesforce Platform.

View the run order of a record-triggered flow.

Use the `TriggerOrder` field, which is on the FlowDefinitionView object. Introduced in API version 54.0, this field has been added to the Object Reference for the Salesforce Platform.

Salesforce Scheduler

Relate an engagement channel type to a work type

Use the new EngagementChannelWorkType, EngagementChannelWorkTypeFeed, and EngagementChannelWorkTypeHistory objects.

Relate an engagement channel type to a shift

Use the new ShiftEngagementChannel, ShiftEngagementChannelFeed, and ShiftEngagementChannelHistory objects.

Relate a work type or work type group to a shift

Use the new ShiftWorkTopic, ShiftWorkTopicChangeEvent, ShiftWorkTopicFeed, ShiftWorkTopicHistory, ShiftWorkTopicOwnerSharingRule, and ShiftWorkTopicShare objects.

Specify whether the engagement channel type is active (true) or not (false)

Use the new `IsActive` field on the EngagementChannelType object.

Specify the usage type for the engagement channel type

Use the new `UsageType` field on the EngagementChannelType object.

Specify the engagement channel type that's associated with the service appointment

Use the new `EngagementChannelTypeId` field on the ServiceAppointment object.

Specify the end date of a recurrence period

Use the new `RecurrenceEndDate` field on the Shift object.

Specify the recurrence pattern, such as frequency, count, or interval, for the shift

Use the new `RecurrencePattern` field on the Shift object.

Specify the start date of a recurrence period

Use the new `RecurrenceStartDate` field on the Shift object.

Specify whether the shift type is regular or recurring

Use the new `Type` field on the Shift object.

Security, Identity, and Privacy

DEPRECATED: These fields are deprecated in the NamedCredential object in API version 56.0

These fields are only valid for legacy named credentials.

- `AuthProviderId`
- `AuthTokenEndpointUrl`
- `Endpoint`
- `JwtAudience`
- `JwtFormulaSubject`
- `JwtIssuer`
- `JwtTextSubject`
- `JwtValidityPeriodSeconds`
- `PrincipalType`

See Improve Integrations with Increased Extensibility and Security for Named Credentials.

Store information on changes related to the tenant history
> Use the new TenantSecurityTenantInfo object.

View the apps connected to a tenant
> Use the new `ConnectedApp` field on theTenantSecurityMobilePolicyTrend object.

View who installed a package
> Use the new `InstalledBy` field on the TenantSecurityPackage object.

Add notes, attachments, and sharing options for a Privacy Request
> Use the `PrivacyRequestFeed`, `PrivacyRequestHistory`, `PrivacyRequestOwnerSharingRule`, and `PrivacyRequestShare` associated objects.

Service

Create cases from emails if the Lightning page layout includes an editable Source field
> Email-to-Case uses the new `Name` field on the existing EmailMessage object.

Store a value for a third-party email client to identify which thread an email belongs to
> Use the new `ClientThreadIdentifier` field on the existing EmailMessage object.

Specify a time zone for a workload history, forecast, or capacity plan in Workforce Engagement
> Use the new `TimeZone` field on the existing Workload and WorkforceCapacity objects.

Set a rest time between consecutive shifts in Workforce Engagement
> Use the new `RestTimeMinutes` value on the `SchedulingRuleType` field on the existing SchedulingRule object. Set the rest period in minutes in the new `RestTimeMinutes` field on the existing SchedulingConstraint object.

Consider absences and working hours when determining resource availability in Workforce Engagement
> Use the new ConsiderAbsence and ConsiderSTM types in the `SchedulingParameterKey` field on the existing SchedulingRuleParameter object.

Log the programmatic name of a Trailhead module assigned to an agent
> Use the new `ApiName` field on the LearningContent object.

Let your agents handle voicemail messages alongside other voice calls
> Use the new `CallOrigin` field on the VoiceCall object.

Let your agent extend wrap-up time after voice calls
> Use the new `AcwExtensionDuration`, `AfterConvoWorkMaxTime`, `HasAcwExtensionEnabled`, `HasAfterConvoWorkTimer`, and `MaxExtensions` fields on the PresenceUserConfig and ServiceChannel objects.

Associate a broadcast topic with a list of Experience Cloud network sites
> Use the new BroadcastTopic and BroadcastTopicNetwork objects.

Create a swarm channel in Slack from Salesforce
> Use the new CollaborationRoom, Swarm, and SwarmMember objects.

Assign an enhanced bot as the target for a work item waiting to be routed
> Use the new `BotId` field on the PendingServiceRouting object.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Work with new commerce, named credentials, and survey features. Take advantage of site search and enhanced CMS workspaces, which are now generally available.

Improved Security for Connect APIs

To prevent unauthorized requests, we improved access checks for Connect APIs. Access checks verify that the context user and the context user's org have the correct permissions to access the APIs. The access check improvements don't structurally change the APIs, but some APIs return different status codes and error messages.

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

New and Changed Connect REST API Resources

These resources are new or have changes.

Commerce

Get and apply promotions for a cart

Make a POST request to the new `/commerce/promotions/actions/evaluate` resource.

New request body: Promotion Evaluation Input

New response body: Promotion Evaluation

These commerce promotion resources aren't supported in version 56.0 and later. Use the new `/commerce/promotions/actions/evaluate` resource instead.

- `/commerce/webstores/`***`webstoreId`***`/promotions/actions/associate`
- `/commerce/webstores/`***`webstoreId`***`/promotions/actions/execute`

Get taxes for a product

Make a GET request to the new `/commerce/webstores/`***`webstoreId`***`/taxes/products/`***`productId`*** resource.

New response body: Store Taxes Info

Get address IDs for buyer account addresses

Make a GET request to the existing `/commerce/webstores/`**`webstoreId`**`/accounts/`**`accountId`**`/addresses` resource.

New optional request parameter: `addressId`

Get price adjustment details from order summaries

Make a GET request to the existing `/commerce/webstores/`**`webstoreId`**`/order-summaries` resource.

New optional request parameter: `includeAdjustmentDetails`

Get product selling models for a product

Make a GET request to the existing `/commerce/webstores/`**`webstoreId`**`/products/`**`productId`** resource.

New optional request parameter: `excludeProductSellingModels`

Select the payment method when ensuring a refund

Make a POST request to the existing
`/commerce/order-management/order-summaries/orderSummaryId/async-actions/ensure-refunds-async` resource.

New optional request parameter: `isAllowPartial`

New optional request parameter: `sequences`

Include return fees when creating return orders

Make a POST request to the existing `/commerce/returns/return-orders` resource.

Charge return fees when returning return order line items

Make a POST request to the existing
`/commerce/returns/return-orders/returnOrderId/actions/return-items` resource.

New optional request parameter: `returnOrderItemFees`

Create invoices for one or more change orders

Make a POST request to the new
`/commerce/order-management/order-summaries/actions/create-multiple-change-invoices` resource.

New request body: Create Multiple Invoices From Change Orders Input

New response body: Create Multiple Invoices From Change Orders Output

Subtract fees when ensuring refunds

Make a POST request to the existing
`/commerce/order-management/order-summaries/orderSummaryId/async-actions/ensure-refunds-async` resource.

New optional request parameter: `invoicesToPay`

Specify an external reference identifier when creating an order summary

Make a POST request to the existing `/commerce/order-management/order-summaries` resource.

New optional request parameter: `externalReferenceIdentifier`

Ensure and apply funds for multiple invoices

Make a POST request to the new
`/commerce/order-management/order-summaries/async-actions/multiple-ensure-funds-async` resource.

New request body: Multiple Ensure Funds Async Input

New response body: Multiple Async Output

Contract Lifecycle Management (CLM)

Check in a contract document version using contract document version ID

Make a PATCH request to the new
/connect/clm/contract-document-version/$*{contractDocumentVersionId}*/checkin resource.

New response body: Generic Output

Check out a contract document version for modification

Make a POST request to the new
/connect/clm/contract-document-version/$*{contractDocumentVersionId}*/checkout resource.

New request body: Template Input

New response body: Document Generate

Get and delete content document details

Make a GET and DELETE requests to the new
/connect/clm/contract-document-version/$*{contractDocumentVersionId}*/content-documents
resource.

New response body: Content Document List

Execute possible actions for a contract based on the status

Make a PATCH request to the new /connect/clm/contract/$*{contractId}* resource.

New request body: Contract Action Input

New response body: Generic Output

Update and create contracts using the object ID

Make a PATCH and POST requests to the new /connect/clm/contract resource.

New request body: Contract Input

New response body: Contract List

Get and create contract document versions

Make a GET and POST requests to the new
/connect/clm/contract/$*{contractId}*/contract-document-version resource.

New request body: Template Input

New response body: Document Generate

Get the status of document generation process

Make a GET request to the new /connect/clm/document-generation-process/status resource.

New response body: Document Generation Process Status

Get the list of configured templates for a usage type

Make a GET request to the new /connect/clm/document-template resource.

New response body: Template List

Get the list of actions possible for a particular contract

Make a GET request to the new /connect/clm/contract/$*{contractId}*/contract-actions resource.

New response body: Contract Action List

Lock an active contract document version

Make a PATCH request to the new
`/connect/clm/contract-document-version/$`***{contractDocumentVersionId}***`/lock` resource.

New response body: Generic Output

Unlock latest contract document version

Make a PATCH request to the new
`/connect/clm/contract-document-version/$`***{contractDocumentVersionId}***`/unlock` resource.

New response body: Generic Output

Change the template in a contract document version

Make a PATCH request to the new
`/connect/clm/contract-document-version/$`***{contractDocumentVersionId}*** `resource.

New request body: Template Input

New response body: Document Generate

Customer Data Platform

Get an ordered batch of segments

Make a GET request to the existing `/ssot/segments` resource.

New query parameters: `batchSize`, `offset`, `orderBy`

Einstein Bots

Get the activation information of a bot version

Make a GET request to the new `/connect/bot-versions/`***botVersionId***`/activation` resource.

New response body: Bot Version Activation Info

This request is available in version 50.0 and later, but was previously undocumented.

Change the activation information of a bot version

Make a POST request to the new `/connect/bot-versions/`***botVersionId***`/activation` resource.

New request body: Bot Version Activation Input

New response body: Bot Version Activation Info

This request is available in version 50.0 and later, but was previously undocumented.

Get conversation application definition details

Make a GET request to the new `/connect/conversation-application` resource.

New required request parameter: `integrationName`

New response bodies: Conversation Application Definition Detail

This request is available in version 54.0 and later, but was previously undocumented.

E-signature

View a list of documents sent for e-signature

Make a GET request to the new
`/connect/e-sign/documents?sourceObjectId=<sourceObjectId>&documentSelector=<customClassName>`
resource.

New response body: Document List

Send document envelope to vendor for e-signature

Make a POST request to the new `/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send` resource.

New request body: Envelope Send Input

New response body: Envelope Send Response

Update e-signature envelope status

Make a PATCH request to the new
`/connect/e-sign/signature-requests/${sourceObjectId}/envelopes/status` resource.

New response body: Envelope Status List

Expire or void envelopes associated with an object

Make a PATCH request to the new
`/connect/e-sign/signature-requests/${sourceObjectId}/envelopes/void` resource.

New request body: Envelope Void Input

New response body: Envelope Void

Get e-signature notification settings

Make a GET request to the new `/connect/e-sign/notification-settings` resource.

New response body: E-signature Notification Settings

Get list of e-signature recipients

Make a GET request to the new `/connect/e-sign/recipients` resource.

New response body: Recipient List

Get e-signature signer roles

Make a GET request to the new `/connect/e-sign/signer-roles` resource.

New response body: Signer Roles Details

Named Credentials

Create a credential

Make a POST request to the new `/named-credentials/credential` resource.

New request body: Credential Input

New response body: Credential

Get a credential

Make a GET request to the new `/named-credentials/credential` resource.

Required request parameters: `externalCredential`, `principalType`

New response body: Credential

Update a credential

Make a PUT request to the new `/named-credentials/credential` resource.

New request body: Credential Input

New response body: Credential

Delete a credential

Make a DELETE request to the new `/named-credentials/credential` resource.

Required request parameters: `externalCredential, principalType`

Get the URL for the OAuth token flow for an external credential

Make a POST request to the new `/named-credentials/credential/auth-url/o-auth` resource.

New request body: OAuth Credential Auth URL Input

New response body: OAuth Credential Auth URL

Get external credentials that the user can authenticate to

Make a GET request to the new `/named-credentials/external-credentials` resource.

New response body: External Credential List

Get an external credential, including the named credentials and principals associated with it and the type and status of each principal

Make a GET request to the new `/named-credentials/external-credentials/`***`developerName`*** resource.

New response body: External Credential

Salesforce Scheduler

Retrieve a list of active engagement channel types

Make a GET request to the new `/connect/scheduling/engagement-channel-types` resource.

New response body: Engagement Channel Type Output

Site Search and Enhanced CMS Workspaces (Generally Available)

Create managed content by uploading a binary file with a multipart/form-data request

Make a POST request to the existing `/connect/cms/contents` resource.

Update a managed content variant by uploading a binary file with a multipart/form-data request

Make a PUT request to the existing `/connect/cms/contents/variants/`***`variantId`*** resource.

Get collection items for a channel

Make a GET request to the new
`/connect/cms/delivery/channels/`***`channelId`***`/collections/`***`collectionKeyOrId`*** resource.

New response body: Managed Content Collection Items

Get collection items for an Experience Cloud site

Make a GET request to the new `/connect/sites/`***`siteId`***`/cms/delivery/collections/`***`collectionKeyOrId`*** resource.

New response body: Managed Content Collection Items

These resources, previously available in beta, are generally available.

- `/connect/cms/delivery/channels/`***`channelId`***
- `/connect/cms/delivery/channels/`***`channelId`***`/contents`
- `/connect/sites/`***`siteId`***`/cms/delivery/contents`
- `/connect/cms/delivery/channels/`***`channelId`***`/contents/`***`contentKeyOrId`***
- `/connect/sites/`***`siteId`***`/cms/delivery/contents/`***`contentKeyOrId`***
- `/connect/cms/channels/`***`channelId`***`/search/indexes`
- `/connect/cms/contents`
- `/connect/cms/contents/publish`

- `/connect/cms/contents/unpublish`
- `/connect/cms/contents/variants/`***`variantId`***
- `/connect/cms/spaces/`***`contentSpaceId`***
- `/connect/sites/`***`siteId`***`/search`

Surveys

Create invitations using the invitation configuration details and initiate the process of submitting the survey responses

Make a POST request to the new `/connect/surveys/`***`surveyId`***`/survey-response` resource.

New request body: Survey Description Input

New response body: Survey Description Output

Submit the survey responses

Make a PATCH request to the new `/connect/surveys/`***`surveyId`***`/survey-response` resource.

New request body: Survey Response Input

New response body: Survey Response Output

Initialize the process of submitting survey responses and return the details of the first page of the survey

Make a POST request to the new
`/connect/surveys/`***`surveyId`***`/invitation/`***`surveyInvitationId`***`/survey-response` resource.

New request body: Survey Description Input

New response body: Survey Description Output

Submit the survey responses created using an invitation ID

Make a POST request to the new
`/connect/surveys/`***`surveyId`***`/invitation/`***`surveyInvitationId`***`/survey-response` resource.

New request body: Survey Response Input

New response body: Survey Response Output

SEE ALSO:

Connect REST API Developer Guide: Surveys Resources

Salesforce Scheduler Developer Guide: Engagement Channel Types

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Ensure Refunds Async Input

This request body has these new properties.

- `invoicesToPay`—List of invoices for any fees that reduce the refund, such as return fees.
- `isAllowPartial`—This value controls the behavior when the amounts included in the `sequences` list don't cover the entire refund amount. If this value is false, then the default refund logic is applied to ensure the remaining refund amount. If this value is true, then the unrefunded balance remains on the credit memo. If you don't specify a `sequences` list, this value is ignored and the default refund logic is applied. The default value is false.

- `sequences`—Ordered list of refund amounts and OrderPaymentSummaries to apply them to. The process traverses this list in order and stops when it's refunded the full amount.

Order Summary Input

This request body has this new property.

- `externalReferenceIdentifier`—Used internally to prevent duplicate records. This value is case-sensitive.

Product Import

This request body added this property in version 54.0, but it was undocumented.

- `cmwWorkspaceId`—ID of the CMS Workspace.

Return Items Input

This request body has this new property.

- `returnOrderItemFees`—List of ReturnOrderLineItems to process that represent return fees.

Return Order Line Item Input

This request body has this new property.

- `returnOrderLineItemFees`—List of input data for return fees associated with the order item being returned. A ReturnOrderLineItem of Type Fee is created to represent each fee.

Experience Cloud Sites

Community Input

This request body has this changed property.

- `templateParams`—The `"AuthenticationType"`:`"UNAUTHENTICATED"` value is no longer supported when creating an LWR site.

Microbatching

Microbatching Ingestion Input

This request body has this new property.

- `contentDocumentIds`—List of content document IDs to create content document links between files and records.

Salesforce Scheduler

Service Appointment Input

This request body has this new property.

- `engagementChannelTypeId`—ID of the engagement channel type to associate with the appointment.

Available Territory Slots Input

This request body has this new property.

- `engagementChannelTypeIds`—The ID of the engagement channel type record. The resources and their associated time slots are filtered by the specified engagement channel type.

Site Search and Enhanced CMS Workspaces (Generally Available)

Managed Content Input

This request body has this new property.

- contentKey—Content key to assign to the managed content.

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Order Summary Adjustment

This response body has this new property.

- targetType—Type of price adjustment in promotions.

Product Detail

This response body has this new property.

- productSellingModels—List of product selling models for the product.

Product Import

This response body has these new properties.

- errorMessages—Map of record number to error message.
- numberWarning—Number of warning messages.
- warningMessages—Map of record number to associated list of warning messages.

Product Price

This response body has this new property.

- productPriceEntries—List of line item prices for the product.

Return Items Output

This response body has this new property.

- feeChangeOrderId—ID of the change order created by processing the ReturnOrderLineItems representing return fees. Use this change order to create an invoice.

Customer Data Platform

Customer Data Platform Segment Container Output

This response body has these new properties.

- batchSize—Number of items returned.
- offset—Number of rows skipped before returning results.
- orderByExpression—Expression indicating how results are ordered.

Customer Data Platform Segment Output

This response body has these new properties.

- apiName—API name of the segment.
- lookalikeCriteria—Reserved for future use.
- marketSegmentId—ID of the market segment.

- `segmentMembershipTable`—Name of the segment membership table.
- `segmentOnApiName`—API name of the SegmentOn entity.
- `segmentType`—Type of segment.

Experience Cloud Sites

Community

This response body has these new properties.

- `builderUrl`—Experience Builder URL for the site.
- `imageOptimizationCDNEnabled`—Specifies whether images are optimized for guest users on all devices for sites using Salesforce's CDN for Digital Experiences (`true`) or not (`false`).

Microbatching

Microbatching Error Record Info

This response body has this new property.

- `contentDocumentIds`—List of content document IDs used to create content document links between files and records.

Salesforce Payments

Payment Method Output

This response body has a new property.

- `paymentMethodDetails`—Details about the payment method.

Payment Post Auth Gateway Response

This response body has a new property.

- `paymentMethodDetails`—Details about the payment method.

CRM Analytics REST API

Use the CRM Analytics REST API to retrieve datasets by create and queried dates. Retrieve new recipe nodes, filter connected datasets by `includeLive`, and use the new Input Step in dashboards.

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 datasets by created and queried times

Make a GET request to the `/wave/datasets` resource.

New request parameters: `createdBefore`, `createdAfter`, `lastQueriedBefore`, and `lastQueriedAfter`

Get a collection of live connected objects

Make a GET request to the `/wave/replicatedDatasets` resource.

New request parameter: `includeLive`

Use the new Extension Node in recipes

Make a GET request to the `/wave/recipes/`*`id`* resource.

Response body includes new Extension Node and Extension Parameters representations.

Use the new Input Step and Widget in dashboards

Make a GET request to the `/wave/dashboards/`***`dashboardIdOrApiName`*** resource.

Response body includes new Input Step and Input Widget Parameters representations.

Create new Input Steps and Widgets in dashboards

Make a POST request to the `/wave/dashboards` resource or a PATCH request to
`/wave/dashboards/`*`dashboardIdOrApiName`* resource.

Request body includes new Input Step Input and Input Widget Parameters Input representations.

Use the new Output D360 Node in recipes

Make a GET request to the `/wave/recipes/`*`id`* resource.

Response body includes new Output D360 Node and Output D360 Parameters representations.

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Direct Report Step Input

The request body has these new properties.

- `broadcastFacet`—Indicates whether this step broadcasts faceting filters to other steps in the dashboard (`true`) or not (`false`).
- `isFacet`—Indicates whether this step is a global filter that can be faceted to other steps or widgets in the dashboard (`true`) or not (`false`).
- `receiveFacetSource`—The facet source configuration.

Discovery Parameters Input

The request body has this new property.

- `multiclassFields`—The list of multi-class fields.

Table Widget Parameters Input

The request body has this new property.

- `columnSubtotals`—Indicates whether to display column subtotals (`true`) or not (`false`).

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Auto-Install App Configuration

The response body has these new properties.

- `appDescription`—The description for the Analytics app.

- `appLabel`—The label for the Analytics app.
- `appName`—The developer name for the Analytics app.
- `requestDetailsUrl`—The URL to the request details.

Direct Report Step

The response body has these new properties.

- `broadcastFacet`—Indicates whether this step broadcasts faceting filters to other steps in the dashboard (`true`) or not (`false`).
- `isFacet`—Indicates whether this step is a global filter that can be faceted to other steps or widgets in the dashboard (`true`) or not (`false`).
- `receiveFacetSource`—The facet source configuration.
- `start`—The start value for the step.
- `useGlobal`—Indicates whether this step is faceted to the global step (`true`) or not (`false`).
- `visualizationParameters`—The parameters for the step visualization.

Discovery Parameters

The response body has this new property.

- `multiclassFields`—The list of multi-class fields.

Query

The response body has these new properties.

- `columnGroups`—The query column groups.
- `columnTotals`—The query column totals.
- `rowTotals`—The query row totals.

Replicated Dataset

The response body has these new properties.

- `datasetLabel`—The dataset label associated with the source object being replicated.
- `folderId`—The dataset folder ID associated with the source object being replicated.

Save Parameters

The response body has this new property.

- `measureToCurrenices`—A list of the measures to currencies.

Source Object

The response body has this new property.

- `connectorLabel`—The label of the connector for the source object.

Table Widget Parameters

The response body has this new property.

- `columnSubtotals`—Indicates whether to display column subtotals (`true`) or not (`false`).

Template Configuration

The response body has this new property.

- `layout`—The layout interface definition for the template.

Wave Features

The response body has this new property.

- `canUseNextBestGroupingPrediction`—Indicates whether the Next Best Grouping prediction model is enabled (`true`) or not (`false`).
- `canUseUnifiedAnalytics`—Indicates whether the org has unified analytics enabled (`true`) or not (`false`).
- `specialGroupIdForOrg`—The special group ID for the org.
- `userCanUseInsights`—Indicates whether a user has access to Analytics (`true`) or not (`false`).

Wave Folder

The response body has this new property.

- `installationHistoryUrl`—The URL for the installation history of the app.

Einstein Discovery REST API

Using the Einstein Discovery REST API, retrieve importance metrics for Einstein Discovery AI models and historical predictions.

IN THIS SECTION:

New and Changed Einstein Discovery REST API Resources
These resources are new or have changes.

Changed Einstein Discovery REST API Request Bodies
These request bodies have changes.

Changed Einstein Discovery REST API Response Bodies
These response bodies have changes.

New and Changed Einstein Discovery REST API Resources

These resources are new or have changes.

Get importance metrics for a model

Make a GET request to the new `/smartdatadiscovery/models/`**`modelId`**`/metrics/feature-importance` resource.

New response body: Smart Data Discovery Feature Importance Metric

Get prediction histories

Make a POST request to the new `/smartdatadiscovery/predict-history` resource.

New request body: Predict History Input

New response body: Predict History Collection

Use the new Scikit Learn 102 Model Runtime in AI models

Make a GET request to the `/smartdatadiscovery/models/`**`modelId`** resource.

Response body includes new Smart Data Discovery Scikit Learn 102 Model Runtime representation.

Create AI models with the new Scikit Learn 102 Model Runtime

Make a POST request to the `/smartdatadiscovery/models` resource.

Request body includes new Smart Data Discovery Scikit Learn 102 Model Runtime Input representation.

Use the new Tensor Flow 27 Model Runtime in AI models

Make a GET request to the `/smartdatadiscovery/models/`**`modelId`** resource.

Response body includes new Smart Data Discovery Tensor Flow Model Runtime representation.

Create AI models with the new Tensor Flow 27 Model Runtime

Make a POST request to the `/smartdatadiscovery/models` resource.

Request body includes new Smart Data Discovery Tensor Flow 27 Model Runtime Input representation.

Changed Einstein Discovery REST API Request Bodies

These request bodies have changes.

Smart Data Discovery Model Field Input

The request body has this new property.

- `values`—The list of model field unique values.

Story Input

The request body has this new property.

- `transformations`—A list of field transformations. Valid values are: `Smart Data Discovery Categorical Imputation Transformation Input`, `Smart Data Discovery Extract Day of Week Transformation Input`, `Smart Data Discovery Extract Month of Year Transformation Input`, `Smart Data Discovery Free Text Clustering Transformation Input`, `Smart Data Discovery Numerical Imputation Transformation Input`, `Smart Data Discovery Projected Predictions Transformation Input`, `Smart Data Discovery Sentiment Analysis Transformation Input`, `Smart Data Discovery Typographic Clustering Transformation Input`, and `Smart Data Discovery Zip Code Analysis Transformation Input`.

Changed Einstein Discovery REST API Response Bodies

These response bodies have changes.

Abstract Smart Data Discovery AI Model Metrics

The response body has these new properties.

- `dataSegmentsUrl`—The URL for the data segments metrics of this AI Model.
- `featureImportancesUrl`—The URL for the importance metrics of this AI Model.

Smart Data Discovery Model Field

The response body has this new property.

- `values`—The list of model field unique values.

Story

The response body has this new property.

- `transformations`—A list of field transformations. Valid values are: `Smart Data Discovery Categorical Imputation Transformation Input`, `Smart Data Discovery Extract Day of Week Transformation Input`, `Smart Data Discovery Extract Month of Year Transformation Input`, `Smart Data Discovery Free Text Clustering Transformation Input`, `Smart Data Discovery Numerical Imputation Transformation Input`, `Smart Data Discovery Projected Predictions Transformation Input`, `Smart Data Discovery Sentiment Analysis`

```
Transformation Input, Smart Data Discovery Typographic Clustering Transformation
Input, and Smart Data Discovery Zip Code Analysis Transformation Input.
```

Story Summary Detail

The response body has this new property.

- `featureImportance`—A list of importance metrics.

Story Update

The response body has this new property.

- `transformations`—A list of field transformations. Valid values are: `Smart Data Discovery Categorical Imputation Transformation Input`, `Smart Data Discovery Extract Day of Week Transformation Input`, `Smart Data Discovery Extract Month of Year Transformation Input`, `Smart Data Discovery Free Text Clustering Transformation Input`, `Smart Data Discovery Numerical Imputation Transformation Input`, `Smart Data Discovery Projected Predictions Transformation Input`, `Smart Data Discovery Sentiment Analysis Transformation Input`, `Smart Data Discovery Typographic Clustering Transformation Input`, and `Smart Data Discovery Zip Code Analysis Transformation Input`.

Story Version

The response body has this new property.

- `transformations`—A list of field transformations. Valid values are: `Smart Data Discovery Categorical Imputation Transformation Input`, `Smart Data Discovery Extract Day of Week Transformation Input`, `Smart Data Discovery Extract Month of Year Transformation Input`, `Smart Data Discovery Free Text Clustering Transformation Input`, `Smart Data Discovery Numerical Imputation Transformation Input`, `Smart Data Discovery Projected Predictions Transformation Input`, `Smart Data Discovery Sentiment Analysis Transformation Input`, `Smart Data Discovery Typographic Clustering Transformation Input`, and `Smart Data Discovery Zip Code Analysis Transformation Input`.

Text Field Value Configuration

The response body has this new property.

- `ignored`—Indicates whether the field value is ignored (`true`) or not (`false`).

GraphQL API (Generally Available)

Improve your queries with semi-join and anti-join filters, get object metadata, and more. GraphQL API is now generally available.

Create granular queries with a semi-join

To restrict the records returned by the primary query with a semi-join, use the `inq` filter type.

```
query {
  uiapi {
    query {
      Account(where: { Id: { inq: { Opportunity: {and:[
        { StageName: { eq: "Prospecting" } },
        { Probability: { eq: 20.0}}

      ]},
      ApiName:"AccountId" } } }) {
        edges {
          node {
```

```
                    Id
                    Name {
                      value
                      displayValue
                    }
                  }
                }
              }
            }
          }
}
```

The GraphQL query is translated to the following SOQL statement with the `IN` operator.

```
SELECT Id, Name
FROM Account
WHERE Id
IN (
    SELECT AccountId
    FROM Opportunity
    WHERE StageName = 'Prospecting' and
    Probability = 20.0
    )
```

Restrict queries with an anti-join

To restrict the records returned by the primary query with an anti-join, use the `ninq` filter type.

```
query {
  uiapi {
    query {
      Account(where: { Id: { ninq: {
        Opportunity: { StageName: { eq: "Prospecting" }} , ApiName:"AccountId" } } })
{
          edges {
            node {
              Id
              Name {
                value
                displayValue
                label
              }
            }
          }
        }
      }
    }
}
```

The GraphQL query is translated to the following SOQL statement with the `NOT IN` clause.

```
SELECT Id, Name
FROM Account
WHERE Id
NOT IN (
    SELECT AccountId
    FROM Opportunity
```

```
        WHERE StageName = 'Prospecting'
        )
```

Get object metadata

To get object metadata such as an object's child relationships, query `objectInfo` in the `uiapi` field. For example, you can query accounts and cases with object information, similar to the `/ui-api/object-info/{objectApiName}` UI API resource.

```
{
  uiapi {
    objectInfos(apiNames: ["Account", "Case"]) {
      ApiName
      nameFields
      label
    }
  }
}
```

Order and filter a polymorphic parent relationship by name

To order and filter a polymorphic parent relationship, use the `Name` object. For example, the `Who` relationship field in a SocialPost object can reference an Account, Contact, or Lead. You can find the underlying object with a specific email using the `where` clause like this.

```
where: {
  Who: {
    Name: {
      Email: {eq: "spencer.m@example.com"}
    }
  }
}
```

SEE ALSO:

GraphQL API Developer Guide

User Interface API Developer Guide: Get Record Data and Object Metadata

Metadata API

Access more metadata through these new and changed metadata types.

Account Engagement (formerly Pardot)

Execute external actions with Account Engagement

Use the new MarketingAppExtAction metadata type to define and submit external actions to third-party apps.

Package External Actions

Use the existing MarketingAppExtension metadata type and the new MarketingAppExtAction subtype.

Analytics

Use multiple currencies in dataset extended metadata

Use these new fields on the WaveXmdMeasure metadata type.

- Use `currencies` to set the format for each currency.

- Use `currencyCode` to set the default currency for the dataset.
- Use `isMultiCurrency` to indicate whether multiple currencies are available for this dataset or not.

Commerce

Assign a country to a store
Use the new `country` field on the existing WebStoreTemplate metadata type.

Turn on the B2C Commerce High Scale Orders feature
Use the new `enableHighScaleOrders` field on the existing OrderManagementSettings metadata type.

Define the permission sets that can be assigned to external users or shoppers in a store
Use the new PortalDelegablePermissionSet metadata type.

Customization

Log My Domain hostname redirections
Use the new `logRedirections` field on the existing MyDomainSettings metadata type.

Customer Data Platform

Store Customer Data Platform schema objects
Use the externalDataTranObject metadata type to store the Customer Data Platform schema object.

Development

Relay platform events and change data capture events from Salesforce to Amazon EventBridge
Use the EventRelayConfig metadata type to create an event relay.

Dev Hub Settings

Enable DevOps Center
Use the `enableDevOpsCenterGA` preference to install and use the generally available (GA) DevOps Center package.

Event Monitoring

BEHAVIOR CHANGE: The `archiveRetentionYears` field on the HistoryRetentionPolicy metadata type is optional
Use the `archiveRetentionYears` field as a reminder for when you want to manually delete data from the archive. By default, field history data isn't automatically deleted when Field Audit Trail is enabled.

Experience Cloud

Enable enhanced sites and content platform
Use the new `enableEnhancedSitesAndContentPlatform` field on the SiteSettings metadata type. See Do More with the Enhanced Sites and Content Platform (Generally Available).

Migrate and deploy enhanced LWR sites programmatically (beta)
Use the new DigitalExperienceBundle type to retrieve and deploy all of the content that comprises an enhanced LWR site, or use the DigitalExperience subtype to deploy partial site content. Use the new DigitalExperienceConfig type to retrieve and deploy site details such as the site label and URL path prefix. See Upgrade Your Site Deployments with New Metadata API Types (Beta).

Sales

Control the visibility of the Push Count field in Opportunity list views and Pipeline Inspection

To show or hide the Push Count field, use the new `pushCountEnabled` field on the OpportunitySettings metadata type.

Salesforce Flow

Create a flow test associated with a flow version (generally available)

Use the new FlowTest metadata type. For more details, see Test One, Two, Three, Flow (Generally Available).

Find related records in collections of data in flows

Use the new `In` and `Not In` values in the existing `operator` field, which is on the existing FlowCondition subtype of the Flow metadata type. For more details, see Use In and Not In Operators in Flows to Find Related Records.

Specify time offsets in months for scheduled paths in record-triggered flows

Use the new `Months` value in the existing `offsetUnit` field, which is on the existing FlowScheduledPath subtype of the Flow metadata type. See Specify Time Offsets in Months for Scheduled Paths.

Create an invoice for one or more change orders in a flow

Use the new `createInvoiceFromChangeOrders` value in the existing `actionType` field, which is on the existing FlowActionCall subtype of the Flow metadata type.

Run a flow in system context without sharing

Use the `SystemModeWithoutSharing` value in the existing `runInMode` field on the Flow metadata type. Introduced in API version 49.0, this value has been added to the *Metadata API Developer Guide*.

Trigger a journey to run at a specified time and frequency

Use the `ScheduledJourney` value in the existing `triggerType` field, on the FlowStart subtype of the Flow metadata type. Introduced in API version 49.0, this value has been added to the *Metadata API Developer Guide*.

Run a flow only when it's activated

Use the `OnActivate` value in the existing `frequency` field, on the FlowSchedule subtype of the Flow metadata type. Introduced in API version 49.0, this value has been added to the *Metadata API Developer Guide*.

Send customized notifications to users

Use the new `dynamicSendSurveyInvitation` value in the existing `actionType` field on the FlowActionCall subtype of the Flow metadata type.

Send email survey invitations to leads, contacts, and users in your org

Use the new `sendSurveyInvitation` value in the existing `actionType` field on the FlowActionCall subtype of the Flow metadata type.

Sandbox Settings

Disable inactive sandbox email notifications

Use the disableSandboxExpirationEmails setting in the source (production) org.

Security and Identity

Block OAuth Flows to Prevent Security Risks

Use the new OauthOidcSettings type.

In auth providers, enter consumer secrets as plaintext

Starting in November 2022, enter the consumerSecret value as plaintext, for example, <consumerSecret>yourplaintextconsumersecret</consumerSecret>. Existing consumer secrets that were entered as encrypted values can be deployed throughout Winter '23. Also starting in November 2022, in API version 30.0 and later, if a consumer secret

is defined on an authentication provider, the consumer secret is always exported as a placeholder value, not as an encrypted secret. And the consumer secret is always included in the response as a placeholder value, regardless of the value provided for sendSecretInApis.

Reference one or more parameters used to configure a named credential

Use the new `namedCredentialParameters` field on the existing NamedCredential metadata type.

Specify the type of named credential

Use the new `namedCredentialType` field on the existing NamedCredential metadata type. Valid values are `Legacy` for backward compatibility and `SecuredEndpoint`. If an existing named credential's type is null, the credential is treated as `Legacy`.

Prevent users from accessing untrusted URLs when they click a link in a web tab

Use the new `redirectBlockModeEnabled` field on the existing SecuritySettings metadata type.

Encapsulate the parameters that configure a named credential

Use the new NamedCredentialParameter metadata type. Named credential parameters are used to configure named credential callouts through a combination of the type, name, and value/lookup fields.

Specify the details of how Salesforce authenticates to an external system, such as the authentication protocol

Use the new ExternalCredential metadata type.

DEPRECATED: These fields are deprecated on the NamedCredential metadata type in API version 56.0

These fields are valid only when `namedCredentialType` is null or set to `Legacy`.

- `authProvider`
- `authTokenEndpointUrl`
- `awsAccessKey`
- `awsAccessSecret`
- `awsRegion`
- `awsService`
- `certificate`
- `endpoint`
- `jwtAudience`
- `jwtFormulaSubject`
- `jwtIssuer`
- `jwtSigningCertificate`
- `jwtTextSubject`
- `jwtValidityPeriodSeconds`
- `oauthRefreshToken`
- `oathScope`
- `oathToken`
- `outboundNetworkConnection`
- `password`
- `principalType`
- `protocol`
- `username`

See Improve Integrations with Increased Extensibility and Security for Named Credentials.

Configure a connected app for the OAuth 2.0 client credentials flow

Use the new `isClientCredentialEnabled` and `oauthClientCredentialUser` fields on the existing ConnectedApp metadata type.

Set field-level security for a field on permission sets Instead of profiles during field creation (beta)

Use the new `permsetsInFieldCreation` to enable users to assign field-level security to permission sets instead of to profiles when creating a field on an object. This behavior is also available in setting field-level security on a field or changing a field type on a field.

Use Lightning Web Security for Lightning web components

Use the `lockerServiceNext` field on the existing SecuritySettings metadata type. Introduced in API version 53.0, this value has been added to the *Metadata API Developer Guide*.

Enable stricter Content Security Policy

Use the `lockerServiceCSP` field on the existing SecuritySettings metadata type. Introduced in API version 45.0, this value has been added to the *Metadata API Developer Guide*.

REMOVED: These metadata types are removed in API version 56.0

These internal-only metadata types are removed in API version 56.0. If your WSC-generated JAR file contains Java classes related to these types, download the latest Metadata WSDL and regenerate your Java classes.

- ExternalClientApplication
- ExternalAppOauthConfig
- ExternalAppIdTokenConfig
- ExternalAppOauthConsumerScope

Service

Manage Messaging for In-App and Web Messaging channels

Use the new MessagingChannel metadata type.

Set up case routing with an Omni-Channel flow in Email-to-Case

Use the new `fallbackQueue` and `routingFlow` fields on the existing EmailToCaseRoutingAddress metadata subtype of the CaseSettings metadata type.

Consider absences and working hours when determining resource availability in Workforce Engagement

Use the new `ConsiderAbsence` and `ConsiderSTM` values in the `SchedulingParameterKey` field on the existing SchedulingRuleParameter metadata subtype of the SchedulingRule metadata type.

Provide a rest time between consecutive shifts in Workforce Engagement

Use the new `RestTimeMinutes` value in the `SchedulingRuleType` field on the existing SchedulingRule metadata type.

Specify the record name for a record used in an Apex call, flow, or invocable action

Use the new `recordName` field on the existing BotInvocationMapping subtype of the existing BotVersion type. Introduced in API version 54.0, this field has been added to the *Metadata API Developer Guide*.

Use a messaging component in an enhanced bot

Use the new `messageDefinition` field on the existing BotStep subtype and the new ConversationDefinitionRichMessage subtype of the existing BotVersion type. Introduced in API version 54.0, this field and subtype have been added to the *Metadata API Developer Guide*.

Create and manage a bot template

Use the new BotVersion metadata type. Introduced in API version 55.0, this type has been added to the *Metadata API Developer Guide*.

Reports and Dashboards REST API

Get information about recently used report types and recently created reports. Show and hide report types. Get details about objects and joins in report types.

New and Changed Report Type REST API Resources

These resources are new or have changes.

Resource URI	Supported HTTP Methods	Description
`/analytics/report-types/recent/by-user`	GET	Get the list of the logged-in user's recently used report types. Response body includes `type`, `label`, `lastUsedDate`, and other details.
`/analytics/report-types/<report-type>/recent-reports`	GET	Get the list of recently created reports for a specified report type. Request parameters: `isCurrentUser`, `pageSize`, `offset` Response body includes `createdByUser`, `createdDate`, `id`, and `name`.
`/analytics/reports/show-hide-report_type`	PATCH	Show or hide a report type. The request body has these properties. • `templateId`—The report type API name. • `hidden`—Indicates whether the report type is hidden (`true`) or not (`false`).
`/analytics/report-types/<report-type>`	GET	Get metadata for a report type. Response body includes new Objects representations. Response body for custom report types includes new `joinType` representation.

For more information, see the *Reports and Dashboards REST API Developer Guide*.

REST API

These items are new, changed, or deprecated in API version 56.0.

IN THIS SECTION:

New, Changed, and Deprecated Calls

These calls are new, changed, or deprecated in API version 56.0.

Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Generate an OpenAPI 3.0 Document for sObject REST API (Beta)

Now you can tailor much smaller OpenAPI documents that contain only the information that you want. They're more compatible with code generation tools, and two more API resources were added. Generating an OpenAPI document describes a subset of sObjects API resources customized for your organization. With an OpenAPI document, you can quickly set up integrations with Salesforce, and it serves as a single source of truth for Salesforce REST resources.

New, Changed, and Deprecated Calls

These calls are new, changed, or deprecated in API version 56.0.

Changed Calls

/limits

The `/limits` response body now includes a new DailyAsyncApexTests limit. Use this limit to know your org's daily limit and usage for async Apex tests execution.

```
"DailyAsyncApexTests": {
        "Max": 500,
        "Remaining": 500
    },
```

Salesforce Scheduler

BEHAVIOR CHANGE: Filter the availability of appointment candidates and appointment time slots based on the engagement channel type selected

The `getAppointmentCandidates` and `getAppointmentSlots` resources has a new `engagementChannelTypeIds` parameter.

SEE ALSO:

Salesforce Scheduler Developer Guide: Get Appointment Candidates

Salesforce Scheduler Developer Guide: Get Appointment Slots

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:

Sequence the payment methods When ensuring a refund

Use the new `sequences` and `isAllowPartial` properties of the `ensureRefundsAsyncInput` input property of the Ensure Refunds Async action.

Include return fees when creating return orders

Use the new `returnOrderLineItemFees` property of the `returnOrderLineItems` property of the `returnOrderInput` input property of the Create Return Order action.

Charge return fees when returning return order line items

Use the new `returnOrderItemFees` property of the `returnItemsInput` input property of the Return Return Order Items action.

Create an invoice for one or more change orders

Use the new Create an Invoice from Change Orders action.

Subtract fees when ensuring refunds

Use the new `invoicesToPay` property of the `ensureRefundsAsyncInput` input property of the Ensure Refunds Async action.

Specify an external reference identifier when creating an Order Summary

Use the new `externalReferenceIdentifier` property of the `orderSummaryCreateInput` input property of the Create Order Summary action.

Apply lead assignment rules to a collection of leads
> Use the new Apply Lead Assignment Rules action.

Send customized notifications to users
> Use the new dynamicSendSurveyInvitation action.

Send email survey invitations to leads, contacts, and users in your org
> Use the new sendSurveyInvitation action.

For more information on invocable actions, see the *Actions Developer's Guide*.

Generate an OpenAPI 3.0 Document for sObject REST API (Beta)

Now you can tailor much smaller OpenAPI documents that contain only the information that you want. They're more compatible with code generation tools, and two more API resources were added. Generating an OpenAPI document describes a subset of sObjects API resources customized for your organization. With an OpenAPI document, you can quickly set up integrations with Salesforce, and it serves as a single source of truth for Salesforce REST resources.

Where: This change applies to Developer and Partner Developer editions. It's available in sandboxes and scratch orgs that have API Enabled.

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

How: From Setup, select **Enable Salesforce Platform REST API, OpenAPI 3.0 Spec Generation (Beta)**. See Generating an OpenAPI 3.0 Document for sObjects REST API (Beta) in the *Lightning Platform REST API Developer Guide*.

If you used earlier pilot versions, note these changes.

- To request the generation of an OpenAPI document, the request now uses POST instead of GET.
- To specify the parts of the OpenAPI document that you want to generate, use the request body of the POST request.

SOAP API

SOAP API includes changed event types.

Changed Event Types

Changed Event Types

API Type
> The API Type field in event types no longer shows these types (which refer to retired versions of SOAP API):

- `I` —SOAP Cross Instance
- `O`—Old SOAP
- `X`—XmlRPC

> This affects all the event logs that use the API type field.

Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

Commerce

Be notified of an OrderSummary creation result from High Scale Orders

Subscribe to PendingOrdSumProcEvent to receive notifications related to PendingOrderSummary processing.

Revenue

Be notified when a credit memo is generated from a negative invoice line

Subscribe to NegInvcLineProcessedEvent to receive notifications when a negative invoice line is converted to a credit memo.

Be notified when the process to create a Subscription Management quote from an order is complete

Subscribe to `QuoteToOrderCompletedEvent` to receive notifications when a process started by the `/actions/standard/createOrderFromQuote` REST request is complete.

Be notified when the process to amend a Subscription Management asset is complete

Subscribe to `AssetAmendInitiatedEvent` to receive notifications when a process started by the `/asset-management/assets/collection/actions/initiate-amend-quantity` REST request is complete.

Subscription Management API

Subscription Management API now provides enhanced compatibility with other Salesforce products, including Experience Cloud and quotes. Subscription Management also supports positive quantity amendments.

Create a Subscription Management Quote

Use a REST request to create a quote and quote line items.

Create a Subscription Management Order from a Quote

Use the new `/actions/standard/createOrderFromQuote` request.

Increase the Quantity of a Subscription Asset

Use the new `assets/collection/actions/initiate-amend-quantity` request.

Convert a Negative Invoice Line to a Credit Memo

Use the new `commerce/invoicing/invoices/{invoiceId}/actions/convert-to-credit`request.

Automate Invoice Runs With Invoice Schedulers

Use the new `/commerce/invoicing/invoice-schedulers` request.

Retrieve Records Associated with Invoice Run Errors

Use the new `/commerce/invoicing/invoice-batch-runs/{batchInvoiceRunId}/actions/recover` request.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Account Engagement (formerly Pardot)

Execute external actions with Account Engagement

Use the new MarketingAppExtAction object to define and submit external actions to third-party apps.

Development

Relay platform events and change data capture events from Salesforce to Amazon EventBridge

Use the EventRelayConfig object to create an event relay.

Security and Identity

Specify the type of named credential

Use the new `NamedCredentialType` field on the existing NamedCredential object. Valid values are `Legacy` for backward compatibility and `SecuredEndpoint`. If an existing named credential's type is null, the credential is treated as `Legacy`.

Specify the details of how Salesforce authenticates to an external system, such as the authentication protocol

Use the new ExternalCredential object.

DEPRECATED: These fields are deprecated on the NamedCredential object in API version 56.0

These fields are valid only when `NamedCredentialType` is null or set to `Legacy`.

- `AuthTokenEndpointUrl`
- `AwsAccessKey`
- `AwsAccessSecret`
- `AwsRegion`
- `AwsService`
- `CertificateId`
- `Endpoint`
- `JwtAudience`
- `JwtFormulaSubject`
- `JwtIssuer`
- `JwtSigningCertificateId`
- `JwtTextSubject`
- `JwtValidityPeriodSeconds`
- `OauthRefreshToken`
- `OauthScope`
- `OauthToken`
- `OutboundNetworkConnectionId`
- `Password`
- `PrincipalType`
- `Protocol`
- `Username`

See Improve Integrations with Increased Extensibility and Security for Named Credentials.

Service

Identify the relationship between catalog items and fulfillment flows in Service Catalog

Introduced in API version 56.0, use the new `FulfillmentFlowId` field on the existing SvcCatalogItemDef object.

Provide a rest time between consecutive shifts in Workforce Engagement

Use the new `RestTimeMinutes` value in the `SchedulingRuleType` field on the existing SchedulingRule object.

User Interface API

Upload files, prevent duplication of records with idempotent record writes, and work with more objects.

Upload a file

To upload a document or image, use the `POST` request with
`/ui-api/records/content-documents/content-versions`.

Upload a file version

To upload a document or image and associate it with an existing `ContentDocument` and `ContentDocumentLink`, use
the `POST` request with
`/ui-api/records/content-documents/${contentDocumentId}/content-versions`.

Prevent duplication of records and server operations

See Prevent Record Duplication with Idempotent Record Writes for UI API (Beta).

Work with more objects

These objects are now supported by User Interface API. List views don't currently support these objects.

- ActionPlanTmplItmAssessmentInd
- ActionVisibility
- AdCreativeSizeType
- AdOrderItem
- AdOrderLineAdTarget
- AdPageLayoutType
- AdProductTargetCategory
- AdQuote
- AdServer
- AdServerAccount
- AdServerUser
- AdSpaceCreativeSizeType
- AdTargetCategory
- AdTargetCategorySegment
- AdUsageSummary
- AdvAccountForecastFact
- AdvAcctForecastSetPartner
- AiVisitSummary
- AsyncOperationLog
- AttributeCategory
- AttributePicklist
- AttributePicklistValue
- AuthFormRequestRecord
- BroadcastCommunication
- BusinessBrand
- BuyerGroupPricebook
- CaseRelatedIssue
- ChangeRequestRelatedIssue
- ContractDocumentVersion
- CustomObjectParticipant

- Customer
- DataLakeObjectInstance
- EmpUserProvisioningProcess
- EntitlementContact
- ExtDataShare
- ExtDataShareTarget
- FinanceTransactionErrorLog
- FlowOrchestrationInstance
- FlowOrchestrationStageInstance
- FlowOrchestrationStepInstance
- FlowOrchestrationWorkItem
- GeoCountry
- InfoAuthRequestForm
- InfoAuthorizationRequest
- LicensingSnapshotRequest
- LocationGroupAssignment
- LoyaltyMemberCurrency
- LoyaltyMemberTier
- LoyaltyPgmGroupMbrRlnsp
- LoyaltyPgmMbrAttributeVal
- LoyaltyPgmPartnerCurrency
- LoyaltyPgmPartnerPromotion
- LoyaltyPgmPtnrLdgrSummary
- MarketingForm
- MarketingLink
- MarketingLinkContent
- MediaChannel
- MediaContentTitle
- MktDataTransform
- MultipartyInfoAuthRequest
- OmniProcessTransientData
- OrderChangeLog
- OrderItemTaxLineItemSummary
- OrderSummaryRoutingSchedule
- PersonTraining
- ProblemIncident
- ProcessException
- ProductAttributeDefinition
- ProductCategoryAttribute
- ProductEmissionsFactor

- ProductTaxPolicy
- ProgramRebateTypeProduct
- ProgramRebateTypeReference
- QuoteItemTaxItem
- RecordAlert
- Scorecard
- ScorecardAssociation
- ScorecardMetric
- Seller
- StnryAssetWaterActvty
- StnryAssetWaterFtprnt
- SurveyEmailBranding
- SurveyQuestionChoice
- TaxEngineInteractionLog
- WebStorePricebook

Documentation

Updated the User Interface API quick start

The quick start now walks through sending a request using Postman.

Added content for the `/ui-api/object-info/batch/{objectApiNames}` resource

This resource enables you to get object metadata for a list of supported objects. It has been available publicly but wasn't documented before this release.

SEE ALSO:

User Interface API Developer Guide: Upload Files

Einstein

Make it easier for service agents to find knowledge articles with Einstein Search for Knowledge, now generally available. Use live Snowflake data with your Einstein Discovery models and enjoy a more flexible source of truth. Ramp up quickly with new learning maps for Einstein Bots and Einstein Prediction Builder, plus a new welcome experience for Einstein Conversation Insights managers and reps. Customizable dashboards help you show the value of your Einstein Article Recommendations and Einstein Reply Recommendations setups.

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Salesforce Overall

Einstein Search

Einstein Search provides an improved search experience at no additional cost. Einstein Search for Knowledge, which is now generally available, makes it easier for service agents to locate relevant articles. Users can also interact with new Einstein Search Answers enhancements and save answers and links to their clipboards.

Analytics

Einstein Discovery

Deploy models to make predictions with Snowflake data. Identify the most important variables in your model. Get fine-grain model performance of values within variables. See estimated story run time.

Customization

Einstein Prediction Builder

Build effective custom AI predictions by using the Einstein Prediction Builder Learning Map. This one-stop solution shows you how to build, from exploration to troubleshooting. Get valuable insights to drive predictive intelligence for your business.

Development

Einstein Vision and Language

Discover Einstein Vision and Language on the Salesforce Developer Portal and enjoy a more integrated content experience.

Industries

AI Accelerator

Integrate AI Accelerator and Next Best Actions (NBA) for your real-time use cases and show real-time predictions and NBA recommendations on one component. Use the Recommendations Connect API to get recommendations from the predictions generated for your use case.

Einstein Relationship Insights

Get updates when Einstein finds relationship recommendations for the records that you follow. View Relationship Insights from the new Actionable Relationship Center component.

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

Store data extracted from tables in a form.

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.

Sales

Einstein Conversation Insights

Einstein Conversation Insights now includes a welcome experience for new users. Sales reps and managers can also see insights related to customer objections and get faster access to processed calls.

Sales Cloud Einstein

The lead and opportunity scoring model refresh schedule changed.

Service

Einstein Classification

Include encrypted fields when you build your Case Classification model, and deflect cases and improve case handling time by integrating Case Classification with Flows.

Einstein Article Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Article Recommendations.

Einstein Reply Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Reply Recommendations, and keep your Reply Recommendations model fresh with automatic monthly retraining.

Einstein Bots

We're making it easier to learn about Einstein Bots and make smart performance decisions. Admins and developers can find everything they need to know about building, launching, and extending bots in the new Learning Map. Dig deeper into bot performance with new metric types and standard reports. Monitor your bot session use with engaged sessions.

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

IN THIS SECTION:

Enablement
Build workforce skills that tie to business results. Deliver your enablement programs to users directly in Salesforce.

Guidance Center and In-App Guidance
There's a new, immersive way to learn in the flow of work. Get to know how the Guidance Center helps you and your users. In-App Guidance offers more granular control when creating targeted prompts. Explore the new guidance sets and in-app guidance from Salesforce.

Enablement Sites (myTrailhead)
Enhance your enablement site experience with new options for fulfilling your company's unique training and enablement requirements.

Enablement

Build workforce skills that tie to business results. Deliver your enablement programs to users directly in Salesforce.

IN THIS SECTION:

Accelerate Business Outcomes with Enablement Programs (Generally Available)
Build, launch, and track programs that drive targeted business outcomes to meet your company's bottom line by using Enablement (generally available). Your enablement teams can publish and assign programs for employees to complete within their flow of work in Salesforce. Get the data to prove the success of your strategy with enablement-specific analytics.

Accelerate Business Outcomes with Enablement Programs (Generally Available)

Build, launch, and track programs that drive targeted business outcomes to meet your company's bottom line by using Enablement (generally available). Your enablement teams can publish and assign programs for employees to complete within their flow of work in Salesforce. Get the data to prove the success of your strategy with enablement-specific analytics.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.
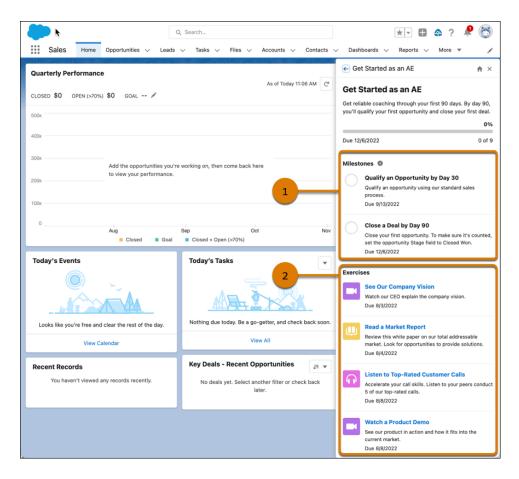
📝 Note: Enablement and enablement sites (also known as Sales Enablement and formerly known as myTrailhead) are different products with unique licenses, permissions, features, and use cases. To learn more about enablement sites, see Enablement Sites (myTrailhead).

Who: This change applies to these users.
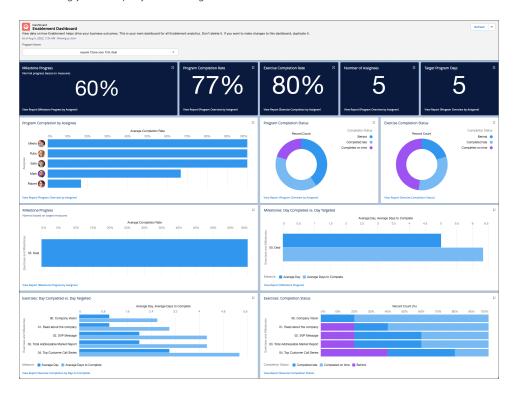
- Users with the Enablement Admin permission set can access the Programs app, create programs in the Program Builder, view their Enablement Dashboard with prebuilt reports for program analytics, and create other custom reports.

- Users with the Content Manager contributor role in the Enablement workspace in the Digital Experiences app can manage links and videos included in programs.

- Users with the Enablement User permission set can access and complete assigned programs.

How: Enablement admins can build programs with embedded, measurable milestones (1) and exercises (2) that include company-specific enablement resources.

Enablement users can open and complete their assigned programs in the Guidance Center in Salesforce. Milestone and exercise completion is tracked automatically.

Later, enablement teams can use prebuilt reports and a dashboard to analyze program-related data, proving whether their strategy is influencing your company's revenue goals.

Plus, enablement teams get even more features to help them build their best programs ever. For example, infuse Salesforce best practices into sales programs with templates for BDRs, AEs, SEs, and other sales roles. And for support at any stage of the launch, enablement admins get a curated collection of in-app guidance from Build, Launch, and Track Programs in the Guidance Center.

SEE ALSO:

Salesforce Help: Enablement

Trailhead: Salesforce Enablement Basics

Guidance Center and In-App Guidance

There's a new, immersive way to learn in the flow of work. Get to know how the Guidance Center helps you and your users. In-App Guidance offers more granular control when creating targeted prompts. Explore the new guidance sets and in-app guidance from Salesforce.

IN THIS SECTION:

Help Users with More Targetable Locations and Backdrop

More granular elements are targetable using targeted prompts for In-App Guidance. To draw more attention to the component being highlighted, targeted prompts now come with a gray backdrop.

Get Help from the Guidance Center

The Learning Paths help panel is now the Guidance Center panel. The updated panel provides more curated suggestions from Salesforce while still prioritizing the custom learning content that you assign with Learning Paths. Users find help to get started, to get back on track when they get stuck, and to get value from workspace solutions faster.

Learn About Salesforce In-App Content

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

Discover More Guidance Sets for Admins

Find a curated list of Trailhead badges, videos, and other resources for setting up Industries solutions, Salesforce Security Center, and Net Zero Cloud. Find resources for upgrading to Account Engagement Lightning.

Help Users with More Targetable Locations and Backdrop
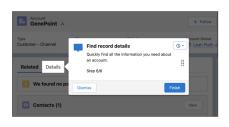
More granular elements are targetable using targeted prompts for In-App Guidance. To draw more attention to the component being highlighted, targeted prompts now come with a gray backdrop.
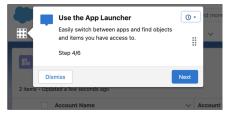
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions.
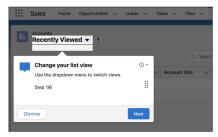
Why: You can control what users notice so that they can easily find the item the prompt refers to.
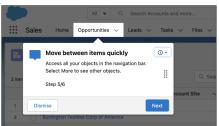
You can now target:

- List view dropdown menu, pin, and buttons in the header
- App name
- App Launcher
- Items in the navigation bar, including items in the item's dropdown menu
- Record tabs and subtabs
- Record highlight panel components and buttons

All targeted prompts, including targeted prompts created before Winter '23, have a gray backdrop. Users click outside of the prompt to remove the backdrop.

How: In Setup, go to the In-App Guidance page, and click **Add**. Select **Targeted Prompt**, and use Targeting Mode under Prompt Position.

SEE ALSO:
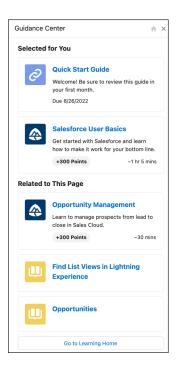
Salesforce Help: In-App Guidance in Lightning Experience

Get Help from the Guidance Center

The Learning Paths help panel is now the Guidance Center panel. The updated panel provides more curated suggestions from Salesforce while still prioritizing the custom learning content that you assign with Learning Paths. Users find help to get started, to get back on track when they get stuck, and to get value from workspace solutions faster.

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

Why: Although the Learning Paths functionality remains the same, the updated Guidance Center panel layout and behavior provides a more immersive and streamlined learning experience. Combine out-of-the-box Salesforce guidance with your own engaging custom content to meet user needs.

Review the important changes in this table.

Feature	Previously	New in Winter '23
Learning panel	Named Learning Paths	Named Guidance Center
Sections	Named Learning for You and Ways to Learn More	Named Selected for You and Related to This Page
Salesforce suggested content	End users saw three modules if no learning was available on the page. Admins saw a limited number of contextual help related to the page.	Salesforce provides curated and personalized content for admins and end users in both sections of the Guidance Center. More pages include help for the page. Content assigned with Learning Paths always appears at the top of each section. Admins can turn off Salesforce suggestions for end users.

Feature	Previously	New in Winter '23
Learning Paths	Admins customized the panel by selecting Trailhead modules and links to custom content. They assigned items to a specific audience and location in the app.	Learning Paths functionality is still available and existing learning item assignments are maintained. However, the Guidance Center shows up to two learning items in each section. All assignments are viewable on Learning Home.
Setup page and visibility settings	Named Learning Paths. Admins could turn off the panel.	Named Guidance Center. Admins can turn off Learning Home and Salesforce suggested content for end users, but the Guidance Center is still visible. Admins always see Salesforce suggestions.

Continue evolving your end-user learning experience with Guidance Center. If you added a custom help section to the Help Menu, transfer those resources to Learning Paths by creating assignments.

How: Click the Trailhead icon in the global header to open the Guidance Center. To assign learning items, select **Assign Learning Content** at the bottom of the panel. To create assignments, select the **Manage Learning** tab. To turn off Learning Paths or Salesforce suggestions, go to the Guidance Center page in Setup.

SEE ALSO:

> *Salesforce Help*: Customize the Guidance Center
>
> *Salesforce Help*: Learning Paths
>
> *Salesforce Help*: Find Help in Lightning Experience

Learn About Salesforce In-App Content

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

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

Why: Salesforce added this in-app content.

Floating prompt	Highlights guidelines and considerations about preventative maintenance.
Docked prompt	Highlights how to use expression sets in the Business Rules Engine app. Describes what expression sets in the Business Rules Engine app are and how to use them.
Targeted prompt, walkthrough	Highlights how to view expression sets versions in the Business Rules Engine app.
Walkthrough	Highlights how to view versions from a decision matrix.
Walkthrough	Highlights how to create a contact in Nonprofit Cloud.
Walkthrough	Highlights how to create a report in Nonprofit Cloud.
Docked prompt	Reminds admins to enable Pipeline Inspection in Sales Cloud.

Floating prompt	Encourages admins to enable Einstein Search for Knowledge after enabling Einstein Search.
Floating prompt	Reminds admins about their Premier Support Plan.
Floating prompt	Guide admins through the upgrade to Hyperforce.
Docked prompt	Highlights how to use engagement attributes for Loyalty Management.
Docked prompt	Reminds admins to enable MFA before Salesforce does it for them in 2023.
Walkthrough	Highlights the new Guidance Center learning panel. Separate walkthroughs for end users and admins.
Welcome mat, walkthrough	Highlights features for Einstein Conversation Insights when the feature is enabled.
Docked prompt	Highlights how to link Zoom accounts for Einstein Conversation Insights.
Floating prompt	Encourages users to use the recording feature to get started with using Einstein Conversation Insights.

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

If you think this content isn't applicable to your users, turn off all in-app content authored by Salesforce from the In-App Guidance Setup page. Click **Settings**, and then deselect **Salesforce Standard In-App Guidance**.

SEE ALSO:

Salesforce Help: Salesforce In-App Content in Lightning Experience

Discover More Guidance Sets for Admins

Find a curated list of Trailhead badges, videos, and other resources for setting up Industries solutions, Salesforce Security Center, and Net Zero Cloud. Find resources for upgrading to Account Engagement Lightning.

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

Why: Explore the new guidance sets.

- **Get Started with Salesforce Security Center**—Security Center gives you a single view of security and governance metrics. Explore these key resources to get up and running with your Security Center.
- **Getting Started with Net Zero Cloud**—Set up the necessary features to track, analyze, and report environmental data to help reduce your carbon emissions and drive sustainability.
- **Get Started with Public Sector Solutions**—Increase constituent engagement and streamline internal workflows by learning the basics and all the setup tasks.
- **Get Started with Rebate Management**—Create flexible and profitable rebate programs and automate payouts and accrual calculations for complete visibility into the incentive lifecycle of your company.
- **Get Started with Order Management**—Learn how to set up and configure Order Management, including users and permissions.
- **Get Started with Elevate**—Help your organization raise money online, manage sustainer donations, and process single and recurring donations.
- **Get Started with Loyalty Management**—Reimagine your loyalty program with capabilities that help you create personalized and connected experiences.

How: Access the Guidance Center anywhere, anytime by clicking the Trailhead icon in the global header. Although the Guidance Center is available to all users, only admins see guidance sets. To view all available sets, select **View More** on Guidance Center Home.

SEE ALSO:

Salesforce Help: Find Help in Lightning Experience

Salesforce Help: Customize the Guidance Center

Enablement Sites (myTrailhead)

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

IN THIS SECTION:

Standardize on Enablement Site Terminology in Setup

To align the product names that appear in Setup and to differentiate from the new Enablement product, some labels related to enablement sites (formerly myTrailhead) have been updated. Now, the labels all appear under Enablement Sites (myTrailhead). In previous releases, some labels—such as items in Setup and the names of specific system permissions—were updated in different ways. And they showed a mix of product names, including myTrailhead, Sales Enablement, or just Enablement. These label changes don't affect any functionality.

Encourage Ongoing Engagement with New Ranger Ranks

Motivate your enablement site's learners to continue completing content in their flow of work with new gamified incentives. Learners can now achieve additional ranger ranks for their profile based on the number of points and badges that they earn. This enhancement gives learners who reach Ranger rank—previously the highest achievable rank—new ways to demonstrate their expertise and showcase their career growth.

Localize Your Enablement Site for Italian and Spanish (Spain)

All enablement sites now support Italian and Spanish (Spain) language options, which allow users to view the enablement site—and any translated content—in the selected language. These language options supplement other languages already available—including Spanish (LATAM)—so that your company can deliver personalized, role-specific enablement content to users in their preferred language.

Standardize on Enablement Site Terminology in Setup
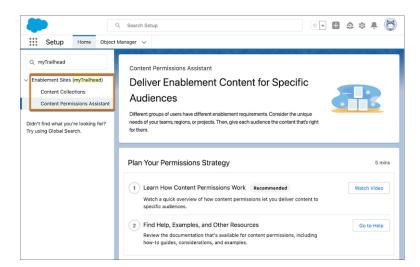
To align the product names that appear in Setup and to differentiate from the new Enablement product, some labels related to enablement sites (formerly myTrailhead) have been updated. Now, the labels all appear under Enablement Sites (myTrailhead). In previous releases, some labels—such as items in Setup and the names of specific system permissions—were updated in different ways. And they showed a mix of product names, including myTrailhead, Sales Enablement, or just Enablement. These label changes don't affect any functionality.

Where: This change applies to enablement sites (myTrailhead), which are available for Enterprise, Performance, and Unlimited editions.
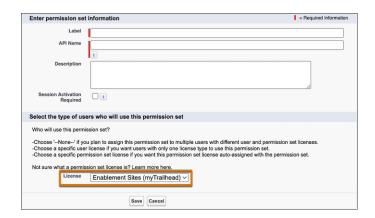
Who: This change appears for users with these permissions.

- View Setup and Configuration
- Manage Permission Sets
- Manage Content Collections

How: In Setup, the Content Permissions Assistant and Content Collections pages now appear under Enablement Sites (myTrailhead).

Also updated is 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 enablement sites, or if your license information has been modified recently, the permission set license name is updated to Enablement Sites (myTrailhead). If you already use enablement sites and your license information hasn't changed recently, the name still appears as myTrailhead or Sales Enablement. The name doesn't affect the license.

These updated terms also appear throughout Salesforce Help.

SEE ALSO:

Salesforce Help: Terminology Changes from myTrailhead to Enablement Sites

Encourage Ongoing Engagement with New Ranger Ranks

Motivate your enablement site's learners to continue completing content in their flow of work with new gamified incentives. Learners can now achieve additional ranger ranks for their profile based on the number of points and badges that they earn. This enhancement gives learners who reach Ranger rank—previously the highest achievable rank—new ways to demonstrate their expertise and showcase their career growth.

Where: This change applies to enablement sites (myTrailhead), which are available for Enterprise, Performance, and Unlimited editions.

When: This change is effective August 2022.

Who: This change is effective for all users who have permission to access at least one content collection on an enablement site that uses Trailblazer.me (TBID) authentication.
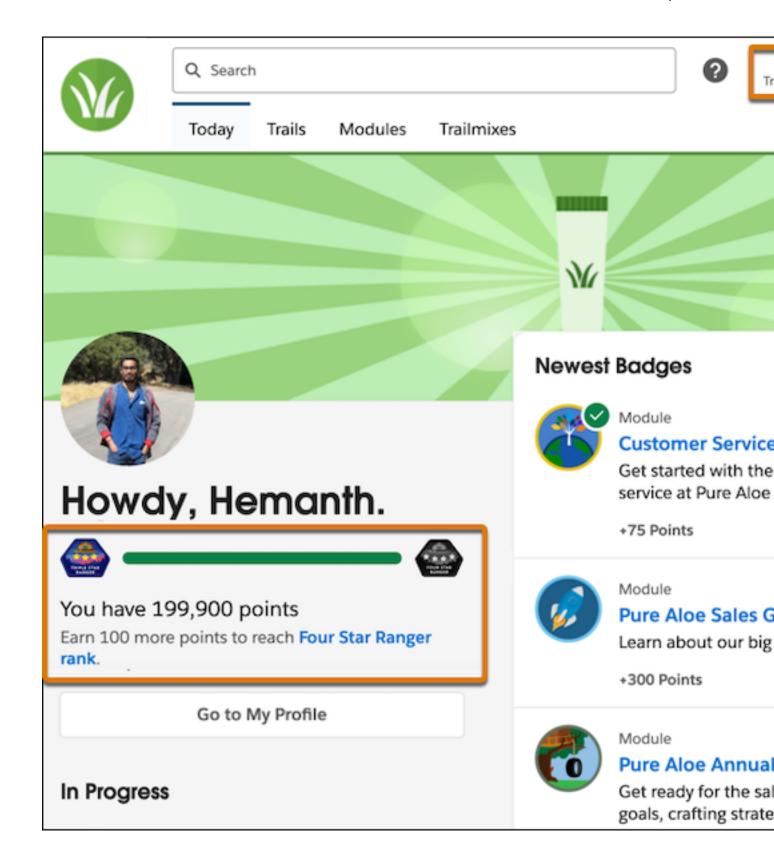
If your enablement site uses Salesforce Identity for Enablement authentication, this change isn't applicable because your enablement site doesn't show profile information such as rank, badges, and points.
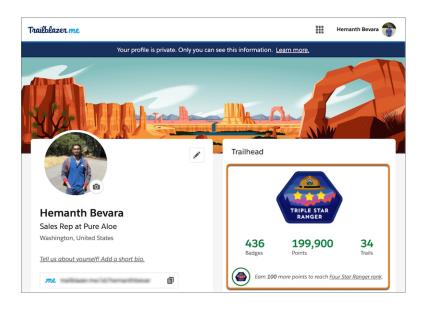
How: These new ranks and their criteria are enabled by default for all enablement sites.

Rank	Required Badges	Required Points
Double Star Ranger	200	100,000
Triple Star Ranger	300	150,000
Four Star Ranger	400	200,000
Five Star Ranger	500	250,000
All Star Ranger	600	300,000

The new ranks appear in these locations.

- On the Today page, which shows the next rank that the learner can achieve
- On the learner's profile page, which shows the learner's current rank and the next rank that they can achieve
- On the Home tab of the Trailhead Slack app
- On the Profile tab of the Trailhead GO app for mobile devices

Salesforce Help: Considerations for Selecting an Authentication Provider

Salesforce Help: Enablement Site User Profile

Salesforce Help: Trailhead App for Slack

Salesforce Help: Access Enablement Site Content on Mobile Devices

Localize Your Enablement Site for Italian and Spanish (Spain)

All enablement sites now support Italian and Spanish (Spain) language options, which allow users to view the enablement site—and any translated content—in the selected language. These language options supplement other languages already available—including Spanish (LATAM)—so that your company can deliver personalized, role-specific enablement content to users in their preferred language.

Where: This change applies to enablement sites (myTrailhead), which are available for Enterprise, Performance, and Unlimited editions.
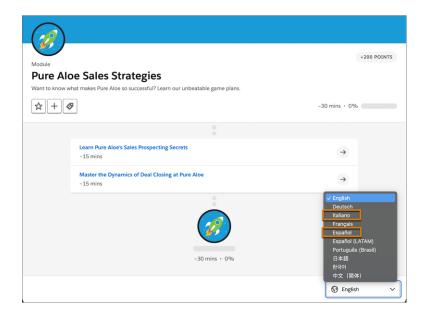
When: This change is effective December 2022.

Who: This enhancement affects users differently depending on their enabled permissions. See the How section for details.

How: This enhancement is available by default for all enablement sites, and affects the user experience of other tools, such as Trailmaker, Trail Tracker, and Slack.

In your enablement site's production environment on a desktop browser

Users with permission to access at least one content collection on your enablement site can select the new languages from the language dropdown in the footer of every page. Selecting a language shows localized labels for default elements: tabs, search, points, completion time, content types, and so on. Localized content displays only if your company has published content that's been localized for those languages.
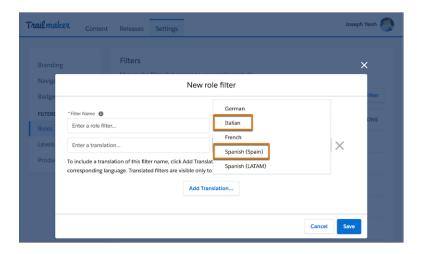
In your enablement site's Trailmaker Content app

Users with the Create Content permission can import trail or module backpacks that include content localized for Italian and Spanish (Spain) in folders named `it-IT` and `es-ES`, respectively.

In your enablement site's Trailmaker Settings app

Users with the Manage Site Settings permission can localize custom filter values into Italian and Spanish (Spain).

In the Trailhead app for Slack

Users with permission to access at least one content collection on your enablement site can:

- Experience the app in Italian and Spanish (Spain).
- Find and share content that's been localized for Italian and Spanish (Spain).

In the Trail Tracker app in Salesforce

Admins can view the Trail Tracker app's labels in Italian and Spanish (Spain). Data and dashboards still appear in English only.

SEE ALSO:

Salesforce Help: Considerations for Languages on Your Enablement Site

Salesforce Help: Guidelines for Localizing Files in a Backpack

Salesforce Help: Add a Custom Filter for Enablement Site Content

Salesforce Help: Trailhead App for Slack

Experience Cloud

Discover a more flexible way to work with enhanced LWR sites and CMS workspaces, now generally available. Search across content, partially deploy a site, enjoy updated content management options, and more, all on one unified platform. Create branded mobile apps in your LWR sites and use improved navigation settings in Mobile Publisher. Unlock better site performance with enhanced domains, Apex caching, and micro-batching.

IN THIS SECTION:

Do More with the Enhanced Sites and Content Platform (Generally Available)

The enhanced sites and content platform is a flexible new system that brings together Salesforce CMS and LWR sites. Now, new LWR sites and CMS workspaces are hosted together on a redesigned platform that offers you partial deployment, site content search, and easy content management. This feature, now generally available, includes several changes since the last release.

Aura and LWR Sites

With the Flow Orchestration Work Guide, assign interactive steps to authenticated visitors on your Aura and LWR sites, and let those visitors complete the steps on your site. Multilingual LWR sites are now optimized for easy discoverability. Adjust the horizontal section padding on LWR sites from the updated Site Spacing panel in Experience Builder.

Components in Experience Builder

Show data from a CRM object record list or an enhanced CMS collection in the new Grid component for LWR sites. The Social Login component for Aura and LWR sites uses site-specific URLs by default for authentication providers. Use the new Site Banner component in Aura and LWR sites to broadcast important updates to your site visitors.

Developer Productivity

Use Google Analytics 4 in your enhanced LWR site to track user engagement. Newly created LWR sites default to authenticated sites, and the URLs for these sites no longer include /s at the end. Track events on all LWR sites in two more components now enabled with light DOM.

Site Performance

Enjoy improved image display speed and the ability to cache Apex methods for guest users. Using micro-batching technology, enable faster record creation and improved high volume case creation.

Mobile for Experience Cloud

Create branded mobile apps for your LWR sites, display an app update notification to your users, and enjoy enhanced navigation settings in Mobile Publisher. In enhanced LWR sites, see improved performance with integer properties that can respond to different screen sizes.

Guest User Security

Remove guest user assignments from permission sets and require granular flow permissions for your guest users.

Security and Sharing

Improve site security with Salesforce's CDN, upgrade your SAML single sign-on, enjoy improvements to custom domains, and more.

Other Changes

Learn about smaller changes that improve Experience Cloud.

Do More with the Enhanced Sites and Content Platform (Generally Available)
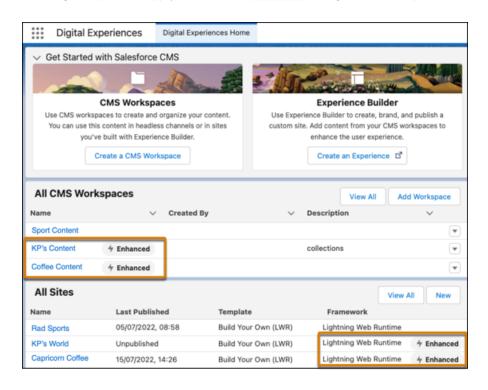
The enhanced sites and content platform is a flexible new system that brings together Salesforce CMS and LWR sites. Now, new LWR sites and CMS workspaces are hosted together on a redesigned platform that offers you partial deployment, site content search, and easy content management. This feature, now generally available, includes several changes since the last release.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.
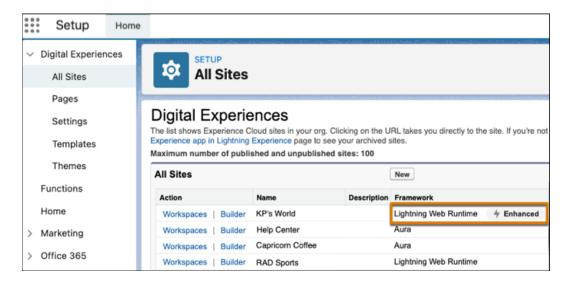
Why: To clarify which features apply where, we use the terms *enhanced LWR sites* and *enhanced CMS workspaces* to refer to LWR sites and CMS workspaces on the new platform.

Enhanced LWR sites can employ partial deployment so you can choose which site elements are ready to go live. And with site content search, your users can find content contained in Rich Content Editor and HTML Editor components. Enhanced CMS workspaces make it easy to create and publish content and manage content variants, collections, and translations. And because everything runs together on our consolidated platform, site search results can include content that you share from an enhanced CMS workspace.
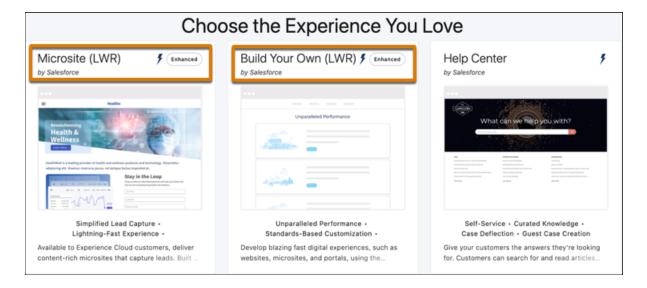
In the Digital Experiences app, you can see an ⚡ **Enhanced** badge beside workspaces and sites that are hosted on the new platform.

Similarly, we added this information to the list of sites in Setup under Digital Experiences.

And now when you create a Microsite or Build Your Own (LWR) site, you can see that they're being created on the enhanced sites and content platform.

How: As part of the Winter '23 release, the enhanced sites and content platform is automatically enabled. So any new LWR sites that you create using the Microsite or the Build Your Own (LWR) templates are now hosted on this new platform. Similarly, any enhanced CMS workspaces that you create also run on the redesigned platform.

Because these new sites and workspaces are hosted together on the same platform, you can share content from an enhanced CMS workspace with an enhanced LWR site only. Existing CMS workspaces and LWR sites are unaffected by this change and can't use the platform's features.

If you're not ready to employ the new platform, you can disable it. From Setup, in the Quick Find box, enter `Digital Experiences`, and then click **Settings**. Deselect **Enable the platform**, and save your changes.

Connect REST API and Connect in Apex support site search and enhanced CMS workspaces.

IN THIS SECTION:

Enhanced CMS Workspaces

Expand your options for managing content, including your translated content, with enhanced CMS workspaces. Manage translated content variants and create manual collections to help you put the right content in front of the right audience. Create sidebar extensions to add spell checkers and other productivity-enhancing tools to the CMS content editor.

Enhanced LWR Sites

Enjoy partial site deployments and improved site search with enhanced LWR sites. Create custom components to show enhanced CMS content on your site.

Enhanced CMS Workspaces

Expand your options for managing content, including your translated content, with enhanced CMS workspaces. Manage translated content variants and create manual collections to help you put the right content in front of the right audience. Create sidebar extensions to add spell checkers and other productivity-enhancing tools to the CMS content editor.

IN THIS SECTION:

View, Create, and Manage Content in Enhanced CMS Workspaces

When you create an enhanced CMS workspace, you can view more of your content details in the simplified user interface. Easily customize and add content to your workspace using the Settings and Add dropdown menus. And manage translated content variants with the new Manage Translations dropdown.

Simplify the Content Translation Lifecycle with Enhanced CMS Workspaces

Content admins and content managers can create, manage, and publish content in multiple languages using enhanced CMS workspaces and translate content at scale. From the new Manage Translations menu, you can import translated content to or export selected content from an enhanced CMS workspace.

Content Variant Page Layout Was Updated

On the content variant detail page, a Status field tells you if the content variant is Draft, Published, or Revised. If you enabled the enhanced CMS during the beta, you need to manually update the page layout to see the field.

Create Collections from Enhanced CMS Workspaces

Harness the organizational power of content collections right from enhanced CMS Workspaces. Use collections to gather items for repeater displays like grids, lists, and carousels to use and reuse in any channel in the workspace. Previously, you made collections from Experience workspaces. Now you can create collections right from your enhanced CMS workspace. When you create collections here, you benefit from the enhanced CMS authoring functions like content drafts, version control, workflows, and approvals.

Use Sidebar Extensions in the Revamped Content Editor in Enhanced CMS Workspaces

To improve your experience when editing your Salesforce CMS content, we revamped the content editor in enhanced CMS workspaces. Now, use the full screen to edit your Salesforce CMS content, and navigate back to your enhanced CMS workspace when you're done. And add content editor extensions to the sidebar, right where your content creators need them.

View a List of Related Content Before You Unpublish in Enhanced CMS Workspaces

Before your users can unpublish content from an enhanced CMS workspace, they see a list and count of all the records that use the content. The list is a helpful prompt for your users to replace the content before they unpublish it, so that site visitors have a more seamless experience.

Updated Requirements for Video Content in the Enhanced CMS
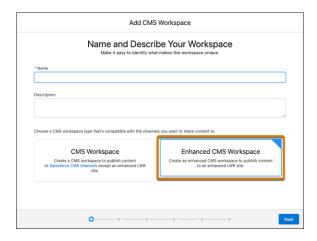
Embed video in rich text fields to enliven your content with product reviews, promotional videos, instructional walk-throughs, and more. For enhanced security, all videos must be hosted on an approved site and configured with https.

View, Create, and Manage Content in Enhanced CMS Workspaces
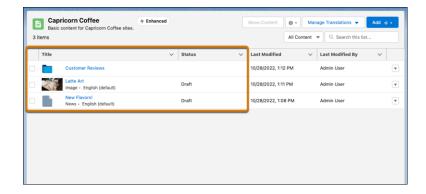
When you create an enhanced CMS workspace, you can view more of your content details in the simplified user interface. Easily customize and add content to your workspace using the Settings and Add dropdown menus. And manage translated content variants with the new Manage Translations dropdown.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.
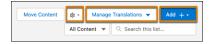
How: To create an enhanced CMS workspace, select **Enhanced CMS Workspace** during the guided setup process.

As you add content to your enhanced CMS workspace, you can view the content type and default language. The Status column shows whether the content is a draft, published, or a revision.

Several buttons that you're familiar with in CMS workspaces are in dropdowns in enhanced CMS workspaces. You can edit workspace details and modify channels, contributors, and languages in ⚙. Import or export translated content variants by using Manage Translations. Add content, folders, or collections by using Add.

Connect REST API and Connect in Apex support enhanced CMS workspaces.

Simplify the Content Translation Lifecycle with Enhanced CMS Workspaces
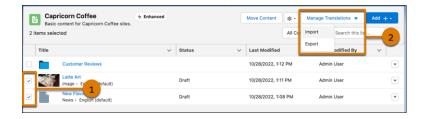
Content admins and content managers can create, manage, and publish content in multiple languages using enhanced CMS workspaces and translate content at scale. From the new Manage Translations menu, you can import translated content to or export selected content from an enhanced CMS workspace.

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

Why: When you import translated content to an enhanced CMS workspace, language variants are created for each primary content item that has a translation. When you publish content that's available in multiple languages, you see a list of languages the content is available in. This way, you know which translated content is available for use in your enhanced LWR site channels. And when you publish, the primary content and language variants are published at the same time to help deliver content to your global audience.

How: To export content for translation from non-enhanced CMS workspaces, the content item status must be Ready For Translation. Then, from the CMS workspace level, you click Export for Translation, and all content with that status is exported from the workspace. Now, in enhanced CMS workspaces, there's no Ready For Translation status. Instead, you select one or more content items from the enhanced CMS workspace in any status (1), then click **Manage Translations**, then select **Export** (2).

You can select one or more enhanced CMS workspace languages to export for translation. Then, the content exports to a .zip file, with each language in its own .xlf file. Check your email for a link to download the exported content.

To import content after translation to non-enhanced CMS workspaces, the content item must have a status of Ready For Translation. Then, from the CMS workspace level, you click Import Translated Content, and upload an .xlf translation file. Now, in enhanced CMS workspaces you click **Manage Translations**, then select **Import**, and upload an .xlf translation file. The content variants are added to the workspace in Draft status.

To publish the content variants, simply publish the managed content. Likewise, when you unpublish the managed content, the content variants unpublish too, and return to Draft status.

Content Variant Page Layout Was Updated

On the content variant detail page, a Status field tells you if the content variant is Draft, Published, or Revised. If you enabled the enhanced CMS during the beta, you need to manually update the page layout to see the field.

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

To make the update, go to Object Manager in Setup and search for *ManagedContentVariant*. From Page Layout, drag the Status field onto the Managed Content Variant detail page.

The Status field displays automatically in orgs that enabled the enhanced CMS in Winter '23 or later.
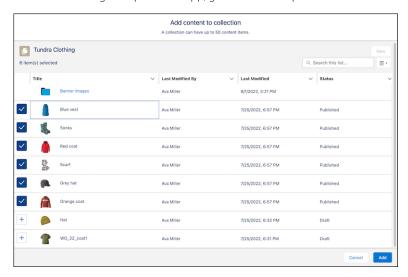
Create Collections from Enhanced CMS Workspaces

Harness the organizational power of content collections right from enhanced CMS Workspaces. Use collections to gather items for repeater displays like grids, lists, and carousels to use and reuse in any channel in the workspace. Previously, you made collections from Experience workspaces. Now you can create collections right from your enhanced CMS workspace. When you create collections here, you benefit from the enhanced CMS authoring functions like content drafts, version control, workflows, and approvals.

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

Why: A collection is a set of content items in Salesforce CMS. In a collection, you can manually curate and order up to 50 items of a single content type. Collect a series of news items to scroll across the top of your site, gather product images for a seasonal promotion, or group related documents for your AI recommendation engine. Collections keep these items grouped and ready to use in your channels.

How: From the Digital Experiences App, go to CMS Workspaces Home. Select an enhanced CMS workspace to create your collection.
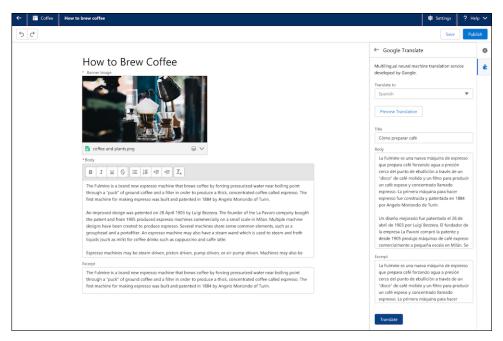
Use Sidebar Extensions in the Revamped Content Editor in Enhanced CMS Workspaces
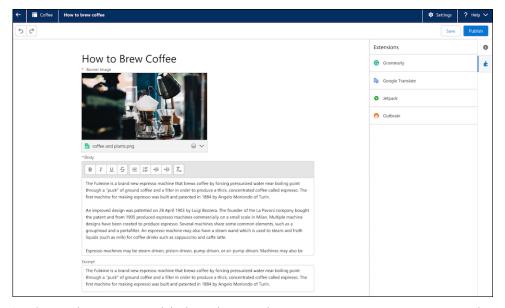
To improve your experience when editing your Salesforce CMS content, we revamped the content editor in enhanced CMS workspaces. Now, use the full screen to edit your Salesforce CMS content, and navigate back to your enhanced CMS workspace when you're done. And add content editor extensions to the sidebar, right where your content creators need them.

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

Why: Sidebar Extensions let you add productivity features to your content workflow like spell checkers, grammar and tone editors, content recommendations, and translation services. Sidebar extension tools have read and write access to your content items so you can work and see updates right in the draft.

How: The extensions panel is visible on the right side of the content editor after you've added at least one extension. You can add as many extensions as your team can use. Content authors can expand and collapse the panel and the extensions within the panel as they work.

Developers who can create and deploy Lightning web components can write custom content editor extensions using the new experience/cmsEditorApi module and load them directly into Salesforce CMS. For more information and code samples, visit the CMS Sidebar Extension GitHub repository. You can also search AppExchange for extensions created by Salesforce partners.

View a List of Related Content Before You Unpublish in Enhanced CMS Workspaces

Before your users can unpublish content from an enhanced CMS workspace, they see a list and count of all the records that use the content. The list is a helpful prompt for your users to replace the content before they unpublish it, so that site visitors have a more seamless experience.

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

Why: When you unpublish content, such as an image, that's used in records, such as news articles, the content becomes unavailable to those records. Site visitors see a blank page or error message.
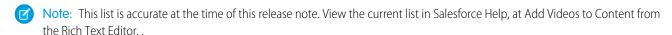
Updated Requirements for Video Content in the Enhanced CMS

Embed video in rich text fields to enliven your content with product reviews, promotional videos, instructional walk-throughs, and more. For enhanced security, all videos must be hosted on an approved site and configured with https.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

From the Salesforce App Launcher, find and open the Digital Experiences app (previously named Salesforce CMS). Select a CMS Workspace, then Create Content. Select the video icon in the rich text editor. Add URL links to videos from any of the following providers:

- youtube.com
- youtube-nocookie.com
- youtube.ca
- youtube.jp
- youtube.com.br
- youtube.co.uk
- youtube.nl
- youtube.pl
- youtube.es
- youtube.ie
- youtube.fr
- player.vimeo.com
- play.vidyard.com
- players.brightcove.net
- bcove.video
- player.cloudinary.com
- fast.wistia.net
- i1.adis.ws
- S1.adis.ws

> **Note:** This list is accurate at the time of this release note. View the current list in Salesforce Help, at Add Videos to Content from the Rich Text Editor. .

Enhanced LWR Sites

Enjoy partial site deployments and improved site search with enhanced LWR sites. Create custom components to show enhanced CMS content on your site.

IN THIS SECTION:

Deploy Partial Site Content via Change Sets

Use clicks, not code, to deploy partial site content with change sets for enhanced LWR sites—no developer required. With partial deployment, you don't finalize and deploy all updates at the same time. Instead, you can move each update from your test environment to production on its own timeline and deliver fresh content to your site visitors faster. Create an outbound change set, add the new Digital Experience component type, select only the updated components, and deploy.

Search for Content Within Components in Your Enhanced LWR Sites

In sites created with the Build Your Own (LWR) template, visitors can now search for content contained within the Rich Content Editor and HTML Editor components. The search results also include content shared from an enhanced CMS workspace. Previously, site visitors used Global Search to find CRM, Knowledge, and CMS content records, but content contained in components on the page wasn't included in the search results.

Create Custom Components to Retrieve Enhanced CMS Content

Use the `experience/cmsDeliveryApi` module to retrieve content from an enhanced CMS workspace. The `getContent` wire adapter retrieves published content from the workspace to use in a custom Lightning web component in an enhanced LWR site.

Assign Different Property Values for Desktop, Tablet and Mobile in Custom Lightning Web Components

Custom Lightning Web Component integer properties can now respond to device screen-size for enhanced LWR Experience Cloud sites. You must programmatically declare the integer properties that you want to be screen-size responsive. Then use Experience Builder to assign the integer property values for the desktop, tablet and mobile view modes. Property values are inherited by smaller screen sizes, unless you assign a different value for the smaller screen sizes.

Upgrade Your Site Deployments with New Metadata API Types (Beta)

Use the new Metadata API types DigitalExperienceBundle and DigitalExperienceConfig to programmatically deploy enhanced LWR sites. Like ExperienceBundle, these new metadata types provide text-based representations of your site elements and settings, such as pages, branding sets, and themes—but reimagined in a more content-focused structure. And now you can partially deploy enhanced LWR sites, giving you more control over which updates to push to production.

Login & Registration Updates for Enhanced LWR Sites

For enhanced LWR sites, we streamlined the Login & Registration settings in the Administration workspace by updating several options and removing others that no longer apply.

Deploy Partial Site Content via Change Sets

Use clicks, not code, to deploy partial site content with change sets for enhanced LWR sites—no developer required. With partial deployment, you don't finalize and deploy all updates at the same time. Instead, you can move each update from your test environment to production on its own timeline and deliver fresh content to your site visitors faster. Create an outbound change set, add the new Digital Experience component type, select only the updated components, and deploy.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Deploy Partial Experience Cloud Site Content with Change Sets (can be outdated or unavailable during release preview)

Search for Content Within Components in Your Enhanced LWR Sites

In sites created with the Build Your Own (LWR) template, visitors can now search for content contained within the Rich Content Editor and HTML Editor components. The search results also include content shared from an enhanced CMS workspace. Previously, site visitors used Global Search to find CRM, Knowledge, and CMS content records, but content contained in components on the page wasn't included in the search results.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Improved site search is available only in enhanced sites created with the Build Your Own (LWR) template.

Connect REST API and Connect in Apex support site search.

Create Custom Components to Retrieve Enhanced CMS Content

Use the `experience/cmsDeliveryApi` module to retrieve content from an enhanced CMS workspace. The `getContent` wire adapter retrieves published content from the workspace to use in a custom Lightning web component in an enhanced LWR site.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: The `getContent` wire adapter retrieves content only from an enhanced CMS workspace.

```
import { LightningElement, api, wire } from 'lwc';
import { getContent } from 'experience/cmsDeliveryApi';
import siteId from '@salesforce/site/Id';

export default class GetContentCmsDeliveryApiV2 extends LightningElement{

    @api
    contentKey;

    data;

    @wire(getContent, {channelOrSiteId: siteId, contentKeyOrId: '$contentKey'})
    onGetContent(result) {
        if result.data) {
            this.data = result.data;
        }
    }
}
```

💡 **Tip:** The `experience/cmsDeliveryApi` is similar to `lightning/cmsDeliveryApi`, which is used for non-enhanced CMS workspaces.

Assign Different Property Values for Desktop, Tablet and Mobile in Custom Lightning Web Components

Custom Lightning Web Component integer properties can now respond to device screen-size for enhanced LWR Experience Cloud sites. You must programmatically declare the integer properties that you want to be screen-size responsive. Then use Experience Builder to assign the integer property values for the desktop, tablet and mobile view modes. Property values are inherited by smaller screen sizes, unless you assign a different value for the smaller screen sizes.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Use Different Property Values for Desktop, Tablet, and Mobile in Custom Lightning Web Components

Upgrade Your Site Deployments with New Metadata API Types (Beta)

Use the new Metadata API types DigitalExperienceBundle and DigitalExperienceConfig to programmatically deploy enhanced LWR sites. Like ExperienceBundle, these new metadata types provide text-based representations of your site elements and settings, such as pages, branding sets, and themes—but reimagined in a more content-focused structure. And now you can partially deploy enhanced LWR sites, giving you more control over which updates to push to production.

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 retrieve and deploy DigitalExperienceBundle and DigitalExperienceConfig, use sfdx legacy commands. DigitalExperienceBundle introduces the concept of content as metadata, with each element of your enhanced LWR site stored on our enhanced sites and content platform as its own content item. Your content items are stored in workspaces, an organized way to view and manage your content resources.

When you retrieve DigitalExperienceBundle, your site workspaces are stored in the site folder (1). Each of your enhanced LWR sites has its own workspace (2), where folders for each content type (3) organize the individual content items (4) that make up the site.

Use DigitalExperience, a subtype of DigitalExperienceBundle, to retrieve and deploy partial site content by selecting specific content items from a site's workspace.

SEE ALSO:

Metadata API Developer Guide: DigitalExperienceBundle (can be outdated or unavailable during release preview)
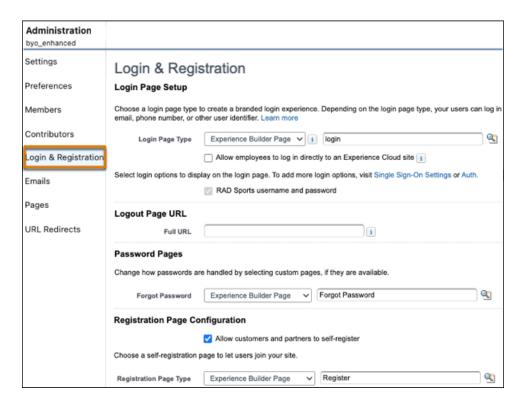
Metadata API Developer Guide: DigitalExperienceConfig (can be outdated or unavailable during release preview)

Login & Registration Updates for Enhanced LWR Sites

For enhanced LWR sites, we streamlined the Login & Registration settings in the Administration workspace by updating several options and removing others that no longer apply.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Check out the changes in the Login & Registration tab to learn more.

- We removed the Branding Options settings because they don't apply to enhanced LWR site pages. Instead, to add a logo to your login pages, you can create a custom component that includes your site logo and drag the component onto the page. See Create a Configurable Site Logo Component.

- For Login Page Type, we renamed `main` to `login` for the Experience Builder Page option.

- For Forgot Password:

  – We removed the Visualforce Page option because it's unsupported.

  – The Experience Builder Page option supports only the `Forgot Password` page, so we removed all other pages from the lookup.

- For Reset Password, we removed the dropdown list entirely. For other site types, you can choose between Default Page and Visualforce Page, but in enhanced LWR sites only the default page is supported.

- For Registration Page Type:

  – We removed the Visualforce Page option because it's unsupported.

  – The Experience Builder Page option supports only the `Register` page, so we removed all other pages from the lookup.

Aura and LWR Sites

With the Flow Orchestration Work Guide, assign interactive steps to authenticated visitors on your Aura and LWR sites, and let those visitors complete the steps on your site. Multilingual LWR sites are now optimized for easy discoverability. Adjust the horizontal section padding on LWR sites from the updated Site Spacing panel in Experience Builder.

IN THIS SECTION:

Allow Site Visitors to Complete Work with the Flow Orchestration Work Guide Component

You can now assign Flow Orchestration interactive steps to credentialed site visitors. All assigned users complete each orchestration work item in the Work Guide on the related record page in the order that the work items were assigned. To allow site visitors to complete their assigned orchestration work, place the Flow Orchestration Work Guide component on the associated record page in your Aura or LWR site. Add the Orchestration Work Item List object page to your Aura or LWR site so that site visitors can see and access all of their assigned Flow Orchestration work items.

Enjoy Improved User Experience on Multilingual LWR Sites

Multilingual LWR sites are optimized for easy discoverability by search engines. Site-content exports are asynchronous, so you can keep working in Experience Builder during the export. And you can offer your LWR site in up to 10 languages, including your default site language, which facilitates more efficient searches on your translated sites. Previously, the maximum number of site translations was 20.

Fine-Tune Your Site Spacing with New and Updated Options for LWR Sites

You can now adjust the horizontal section padding for your LWR sites, in addition to the vertical section padding, to create a wider variety of site designs. Remove all section padding on the left and right for alluring, full-width sites. Add more white space to sections to focus attention on the content in the middle. Revised labels and new tooltips for existing settings on the Site Spacing panel clarify each spacing option.

Offer Your Users Easy File Downloads from Custom Components

Use the `lightning/fileDownload` module's `generateURL` method in your Lightning web components in Experience Cloud sites that use the Build Your Own (LWR) template. The module supports downloads of ContentDocument, ContentVersion, Attachment, and Document content types from desktop and mobile devices.

Secure Components by Default with Lightning Web Security in New Orgs

To protect custom Lightning web components, the setting Use Lightning Web Security for Lightning web components is enabled by default in new Salesforce orgs. The new Lightning Web Security architecture is replacing Lightning Locker over several releases.

Access to Site.com Studio Was Removed from LWR Sites

This bug fix removes the link to Site.com Studio, which is unsupported for LWR sites, from the Workspaces | Administration section of your site. But not to worry—you can create, customize, and publish your LWR site right from Experience Builder.

Allow Site Visitors to Complete Work with the Flow Orchestration Work Guide Component

You can now assign Flow Orchestration interactive steps to credentialed site visitors. All assigned users complete each orchestration work item in the Work Guide on the related record page in the order that the work items were assigned. To allow site visitors to complete their assigned orchestration work, place the Flow Orchestration Work Guide component on the associated record page in your Aura or LWR site. Add the Orchestration Work Item List object page to your Aura or LWR site so that site visitors can see and access all of their assigned Flow Orchestration work items.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions.

Enjoy Improved User Experience on Multilingual LWR Sites

Multilingual LWR sites are optimized for easy discoverability by search engines. Site-content exports are asynchronous, so you can keep working in Experience Builder during the export. And you can offer your LWR site in up to 10 languages, including your default site language, which facilitates more efficient searches on your translated sites. Previously, the maximum number of site translations was 20.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: To achieve search engine optimization for multilingual LWR sites, add your desired languages to the site, upload the translated content, and publish the site. For previously published site translations, republish your site. Either way, the link tags for each translation are then included in the head markup of your site pages, making the translations easier for search engines to find.

When you export your site content for translation, Experience Builder carries out the export process in the background and sends you an email when the export is complete.
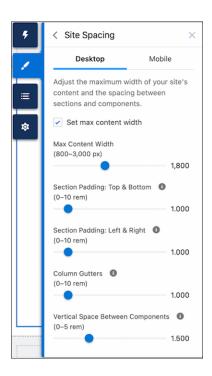
Fine-Tune Your Site Spacing with New and Updated Options for LWR Sites

You can now adjust the horizontal section padding for your LWR sites, in addition to the vertical section padding, to create a wider variety of site designs. Remove all section padding on the left and right for alluring, full-width sites. Add more white space to sections to focus attention on the content in the middle. Revised labels and new tooltips for existing settings on the Site Spacing panel clarify each spacing option.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Use the Site Spacing panel to adjust not only the content width and section padding on your site, but also the space between components and between columns. The spacing options are also reordered on the panel for clearer navigation.

SEE ALSO:

> *LWR Sites for Experience Cloud*: Site Spacing --dxp Styling Hooks (can be outdated or unavailable during release preview)

Offer Your Users Easy File Downloads from Custom Components

Use the `lightning/fileDownload` module's `generateURL` method in your Lightning web components in Experience Cloud sites that use the Build Your Own (LWR) template. The module supports downloads of ContentDocument, ContentVersion, Attachment, and Document content types from desktop and mobile devices.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Import the `generateURL` method from `lightning/fileDownload`. Pass the `recordId` of the file to the `generateURL` method to create a URL to download the file. Use `window.open(url)` to download the file with the generated URL.

- ContentDocument and ContentVersion files download automatically.
- Attachments and Documents open in a new browser tab for preview and download.

```
import { generateUrl } from 'lightning/fileDownload';
const url = generateUrl(recordId);
window.open(url);
```

Authenticated users can download files they have access to. Guest users can download only ContentDocument files that they have access to through Library membership.

Secure Components by Default with Lightning Web Security in New Orgs

To protect custom Lightning web components, the setting Use Lightning Web Security for Lightning web components is enabled by default in new Salesforce orgs. The new Lightning Web Security architecture is replacing Lightning Locker over several releases.

Where: This change applies to new Salesforce orgs that use Lightning Experience in all editions. The Lightning Web Security (LWS) setting affects Lightning web components that are used in Aura sites. It doesn't affect LWR sites.

Why: When LWS is enabled in the org, Lightning web components in an Aura site are protected by LWS. Aura components continue to be protected by Lightning Locker. If you disable Lightning Locker in the Aura site, both Lightning Locker and LWS are disabled for the site.

SEE ALSO:

Use Lightning Web Security by Default in New Salesforce Orgs

Access to Site.com Studio Was Removed from LWR Sites

This bug fix removes the link to Site.com Studio, which is unsupported for LWR sites, from the Workspaces | Administration section of your site. But not to worry—you can create, customize, and publish your LWR site right from Experience Builder.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Components in Experience Builder

Show data from a CRM object record list or an enhanced CMS collection in the new Grid component for LWR sites. The Social Login component for Aura and LWR sites uses site-specific URLs by default for authentication providers. Use the new Site Banner component in Aura and LWR sites to broadcast important updates to your site visitors.

IN THIS SECTION:

Add Enhanced CMS Collections and Record List Data to LWR Sites with the Grid Component

Use the Grid component to show collections or listviews in LWR sites. Select a data source, layout, and pagination option to show content that's saved in Salesforce. In non-enhanced LWR sites, the Grid component shows object listviews. In enhanced LWR sites, the component can display object listviews or CMS collections created in enhanced workspaces.

Enjoy Better Performance for the Social Login Component

To improve single sign-on performance and reduce HTTP redirects, the Social Login component in Aura and LWR sites uses site-specific URLs for authentication providers by default. This change applies to new sites and new Social Login components added to existing sites.

Add a Banner to an Experience Cloud Site
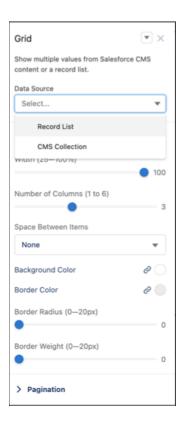
Add the Site Banner component to your Aura and LWR sites to share updates with your customers. The component lets users add a custom banner and message for guest or authenticated site visitors.

Add Enhanced CMS Collections and Record List Data to LWR Sites with the Grid Component
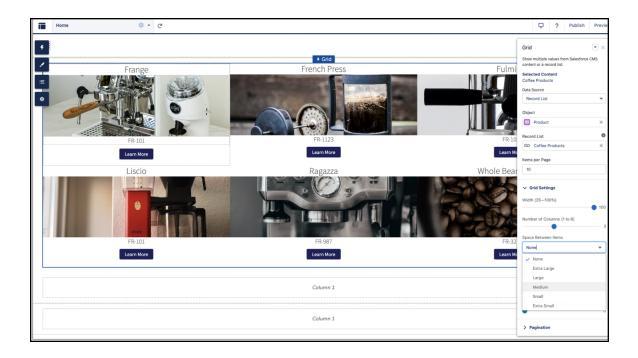
Use the Grid component to show collections or listviews in LWR sites. Select a data source, layout, and pagination option to show content that's saved in Salesforce. In non-enhanced LWR sites, the Grid component shows object listviews. In enhanced LWR sites, the component can display object listviews or CMS collections created in enhanced workspaces.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

How: Add the Grid component to any page on your LWR site, and then use the powerful data binding feature to showcase different values from CMS Collections or record listviews.

The Grid component adds data binding and pagination logic. To show the grid content, add a component such as Image, Tile, or Card to the Grid component.

Enjoy Better Performance for the Social Login Component

To improve single sign-on performance and reduce HTTP redirects, the Social Login component in Aura and LWR sites uses site-specific URLs for authentication providers by default. This change applies to new sites and new Social Login components added to existing sites.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: For Aura and LWR sites, the **Use Experience Builder site auth provider URLs** setting is selected by default. Previously, this setting was deselected by default in Aura sites, and wasn't available in LWR sites.

SEE ALSO:

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

LWR Sites for Experience Cloud: Pages and Components in the LWR Template (can be outdated or unavailable during release preview)

Add a Banner to an Experience Cloud Site

Add the Site Banner component to your Aura and LWR sites to share updates with your customers. The component lets users add a custom banner and message for guest or authenticated site visitors.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions.

How: From the Customer Service Incident Management setup page, enable Customer Service Incident Management, then enable broadcast site banners.

SEE ALSO:

Share Incident Updates with Customers at Scale with Broadcast Communications

Developer Productivity

Use Google Analytics 4 in your enhanced LWR site to track user engagement. Newly created LWR sites default to authenticated sites, and the URLs for these sites no longer include /s at the end. Track events on all LWR sites in two more components now enabled with light DOM.

IN THIS SECTION:

Track User Engagement with Google Analytics 4 (Generally Available)

Use Google Analytics 4 in your enhanced LWR sites to track user engagement and traffic. With a quick connect integration now generally available, you can have deeper insight into how customers are interacting with your site.

Simplify the URLs for Your Authenticated LWR Sites

By popular demand, LWR sites created in Winter '23 or later no longer include /s at the end of their URLs. And all new LWR sites created through Experience Builder or Connect API now default to authenticated. Aura, Visualforce, and existing LWR sites aren't affected by this change.

/services Is No Longer Available as a Base URL for Site Pages

For LWR and Aura sites, you can no longer use `/services` as the base URL when you create site pages or update existing page URLs.

Track Events on LWR Sites in Two More Components Enabled with Light DOM

In the Build Your Own (LWR) and Microsite templates, the HTML Editor and Rich Content Editor components are now light DOM enabled. You can query DOM elements from the document root, which facilitates DOM traversal. And you can listen for events within these components and send the events to multiple third-party analytics services, such as Google Analytics.

Test Custom Domains That Use Your Certificate to Serve Your Sites

Custom Domains in Sandbox now supports customer-owned HTTPS certificates in all orgs.

Track User Engagement with Google Analytics 4 (Generally Available)

Use Google Analytics 4 in your enhanced LWR sites to track user engagement and traffic. With a quick connect integration now generally available, you can have deeper insight into how customers are interacting with your site.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: To start using Google Analytics 4 in your site, go to your site Settings and select Integrations.

Simplify the URLs for Your Authenticated LWR Sites

By popular demand, LWR sites created in Winter '23 or later no longer include /s at the end of their URLs. And all new LWR sites created through Experience Builder or Connect API now default to authenticated. Aura, Visualforce, and existing LWR sites aren't affected by this change.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: This update is applied to new LWR sites automatically, but removing /s from URLs affects these workflows and product behaviors.

- To allow public access to your sites, grant guest user access to those sites in Experience Builder or Connect API.
- You can't update the URL of an existing site. To deploy site updates between sandbox and production orgs, ensure that both URLs include /s or that neither URL includes /s.

- Some URL structures changed. To obtain the correct URL when you configure features like user authentication, from Setup, go to Custom URLs. Copy the full URL of the community with the same name as your Experience Builder site, and paste this URL when prompted during your configuration process.

SEE ALSO:

Experience Cloud Developer Guide: Considerations for Deploying Authenticated LWR Sites (can be outdated or unavailable during release preview)
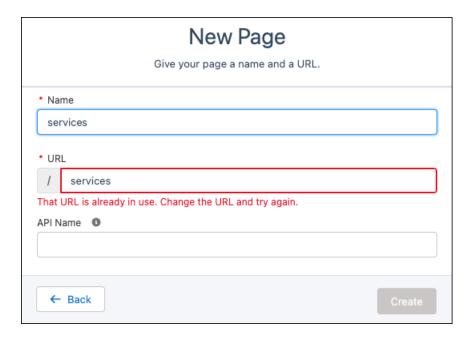
`/services` Is No Longer Available as a Base URL for Site Pages

For LWR and Aura sites, you can no longer use `/services` as the base URL when you create site pages or update existing page URLs.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: This update doesn't affect existing pages that use `/services` in the base URL. However, to move or update the subpages of existing object pages that use `/services`, you must first rename the base URL. For example, you could rename your pages `/service`.

If you try to create pages or update existing page URLs using `/services`, an error message lets you know that the base URL is as already in use.

Track Events on LWR Sites in Two More Components Enabled with Light DOM

In the Build Your Own (LWR) and Microsite templates, the HTML Editor and Rich Content Editor components are now light DOM enabled. You can query DOM elements from the document root, which facilitates DOM traversal. And you can listen for events within these components and send the events to multiple third-party analytics services, such as Google Analytics.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: To take advantage of light DOM on an existing LWR site, republish the site.

SEE ALSO:

Enable Third-Party Integrations with Light DOM (Beta)

Test Custom Domains That Use Your Certificate to Serve Your Sites

Custom Domains in Sandbox now supports customer-owned HTTPS certificates in all orgs.

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. This feature is newly available in Government Cloud, Public Cloud, and Hyperforce sandboxes.

SEE ALSO:

Test Custom Domains That Use Your Certificate in a Sandbox

Site Performance

Enjoy improved image display speed and the ability to cache Apex methods for guest users. Using micro-batching technology, enable faster record creation and improved high volume case creation.

IN THIS SECTION:

Display Images Faster for Guest Users on All Devices

When guest users visit your site, cached images are resized to best suit their phone, tablet, or desktop. Image optimization makes your site's pages load faster, which creates a better browsing experience for your visitors.

Cache Apex Methods for Guest Users (Generally Available)

Caching Apex methods on the Salesforce CDN for Digital Experiences improves the performance of your LWR site. This feature, which is now generally available, includes some changes since the beta release. Control caching of your Apex methods by using caching annotation, and control caching of Apex methods in managed packages by using a site preference. Your site must be served via the Salesforce CDN for Digital Experiences.

Enable Authenticated Users to Create Records More Efficiently

When you implement micro-batching, your authenticated users submit their leads, cases, or custom objects in batches, rather than one at a time. Previously, this feature was available only to guest users.

Help Your Users Create Cases More Efficiently for High-Volume Sites

Your authenticated users can create cases more efficiently when you enable micro-batching on the standard Contact Support Form component. Cases are processed in batches, rather than one at a time, to support a high volume of case creations.

Let Authenticated Users Attach Files to Records Submitted via Micro-Batching

Authenticated users can attach files to records that they submit via micro-batching, boosting the value of high-volume record creation.

Accessibility Improvements in Experience Cloud Sites

Enhancements to Experience Cloud sites make it easier for screen readers to interact with the product. The `header`, `main`, and `search` tags are now included in Aura templates. And after a user opens a Chatter Question in their site by selecting the date link, screen readers announce the title of the question. Both enhancements give users a clearer understanding of where they are on the page.

Display Images Faster for Guest Users on All Devices

When guest users visit your site, cached images are resized to best suit their phone, tablet, or desktop. Image optimization makes your site's pages load faster, which creates a better browsing experience for your visitors.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions with active Experience Cloud licenses.

How: The image optimization setting is enabled for all sites that use Salesforce's CDN for Digital Experiences. To disable this preference, in Experience Workspaces, deselect **Optimize cached images for guest users on all devices** under Administration | Preferences.

Cache Apex Methods for Guest Users (Generally Available)

Caching Apex methods on the Salesforce CDN for Digital Experiences improves the performance of your LWR site. This feature, which is now generally available, includes some changes since the beta release. Control caching of your Apex methods by using caching annotation, and control caching of Apex methods in managed packages by using a site preference. Your site must be served via the Salesforce CDN for Digital Experiences.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

How: To enable caching of your Apex methods, annotate them with @AuraEnabled(cacheable=true scope='global'), and use @wire (LWC) to invoke publicly cacheable Apex actions. To enable caching of Apex methods in managed packages, from the Administration tile of your site's workspace, go to Preferences, then select **Cache public data from Apex methods in Managed Packages**. This preference is enabled by default, and only Apex methods in managed packages that were annotated for caching get cached.

Enable Authenticated Users to Create Records More Efficiently

When you implement micro-batching, your authenticated users submit their leads, cases, or custom objects in batches, rather than one at a time. Previously, this feature was available only to guest users.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

How: On the user's profile, select **Use Micro-Batching to Create Records**. Then invoke micro-batching with the `Network.createRecordAsync` Apex method, or in the Site Performance section of the Create Records Form component, select **Create records in batches**.
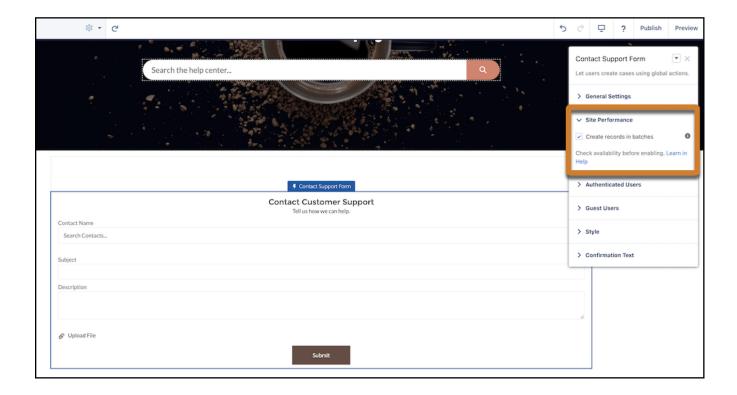
Help Your Users Create Cases More Efficiently for High-Volume Sites

Your authenticated users can create cases more efficiently when you enable micro-batching on the standard Contact Support Form component. Cases are processed in batches, rather than one at a time, to support a high volume of case creations.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Authenticated users with the Use Micro-Batching to Create Records permission.

How: In the Site Performance section of the Contact Support Form component, select **Create cases in batches**.
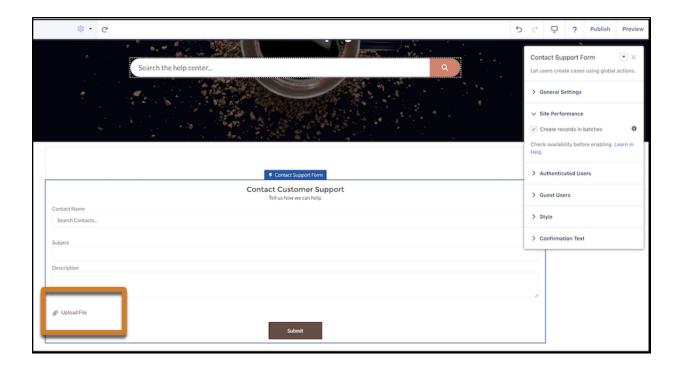
Let Authenticated Users Attach Files to Records Submitted via Micro-Batching

Authenticated users can attach files to records that they submit via micro-batching, boosting the value of high-volume record creation.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Authenticated users with the Use Micro-Batching to Create Records user permission.

How: Invoke micro-batching using the `Network.createRecordAsync` Apex method with the file attachment parameter to create leads, cases, or custom objects with file attachments. You can also use Connect REST API to attach files using micro-batching. In the Site Performance section of the Contact Support Form, you can select **Create cases in batches**. Users can then select **Upload File** on the component to attach a file. Records with files attached are submitted in batches, rather than one at a time.

Accessibility Improvements in Experience Cloud Sites

Enhancements to Experience Cloud sites make it easier for screen readers to interact with the product. The `header`, `main`, and `search` tags are now included in Aura templates. And after a user opens a Chatter Question in their site by selecting the date link, screen readers announce the title of the question. Both enhancements give users a clearer understanding of where they are on the page.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Mobile for Experience Cloud

Create branded mobile apps for your LWR sites, display an app update notification to your users, and enjoy enhanced navigation settings in Mobile Publisher. In enhanced LWR sites, see improved performance with integer properties that can respond to different screen sizes.

IN THIS SECTION:

Create Mobile Publisher for Experience Cloud Apps for LWR Sites (Beta)

The Lightning Web Runtime (LWR) framework focuses on performance and flexibility. LWR sites are faster and more developer-friendly than their Aura counterparts. Mobile Publisher for Experience Cloud apps for LWR sites take advance of this underlying technology to fuel the next generation of Experience Cloud sites.

Use a Message to Urge or Require Your App Users to Update

Show a message to your Mobile Publisher for Experience Cloud app users to encourage or require them to update their app. By updating, your users avoid a service disruption as a result of the impact of the new Enhanced Domains standard.

Set Up App Navigation Settings with Ease

We've streamlined your workflow by consolidating the Mobile Publisher for Experience Cloud navigation settings in Experience Builder. The reconfigured Navigation tab is available from Mobile Publisher Settings.

Additional Mobile Publisher Enhancements for Experience Cloud

Updates to Mobile Publisher can help you get more out of Experience Cloud.

Create Mobile Publisher for Experience Cloud Apps for LWR Sites (Beta)

The Lightning Web Runtime (LWR) framework focuses on performance and flexibility. LWR sites are faster and more developer-friendly than their Aura counterparts. Mobile Publisher for Experience Cloud apps for LWR sites take advance of this underlying technology to fuel the next generation of Experience Cloud sites.

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.

SEE ALSO:

Mobile Publisher for Experience Cloud Supports Lightning Web Runtime (LWR) Sites (Beta)

Use a Message to Urge or Require Your App Users to Update

Show a message to your Mobile Publisher for Experience Cloud app users to encourage or require them to update their app. By updating, your users avoid a service disruption as a result of the impact of the new Enhanced Domains standard.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Urge or Require Users to Update to the Latest Mobile Publisher App Version

Set Up App Navigation Settings with Ease

We've streamlined your workflow by consolidating the Mobile Publisher for Experience Cloud navigation settings in Experience Builder. The reconfigured Navigation tab is available from Mobile Publisher Settings.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Configure Mobile Publisher Navigation Settings More Easily

Additional Mobile Publisher Enhancements for Experience Cloud

Updates to Mobile Publisher can help you get more out of Experience Cloud.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Here are a few of the big changes to keep an eye on.

- Managed Public Distribution Option for Android Is Now Retired
- Kiosk Mode for Barcode Scanner

- Access the Mobile Device Calendar From Mobile Publisher Apps

Guest User Security

Remove guest user assignments from permission sets and require granular flow permissions for your guest users.

IN THIS SECTION:

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. You can no longer assign guest users permission sets or permission set groups that are associated with permission set licenses that contain the restricted permissions. The only standard object permissions allowed for guest users are read and create. This update was first available in Spring '22 and is enforced in Winter '23.

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)
In Winter '22, Salesforce discontinued the Run Flows permission for the Guest User profile 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. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. 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.

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. You can no longer assign guest users permission sets or permission set groups that are associated with permission set licenses that contain the restricted permissions. The only standard object permissions allowed for guest users are read and create. This update was first available in Spring '22 and is enforced in Winter '23.

> ✏️ 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.

During the Winter '23 release, Salesforce enforces this update and removes the affected permission set and permission set group assignments from guest users. If you're affected, Salesforce Customer Support contacts you directly about your process and timeframe for the update.

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 became 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

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

In Winter '22, Salesforce discontinued the Run Flows permission for the Guest User profile 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. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. 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.

Security and Sharing

Improve site security with Salesforce's CDN, upgrade your SAML single sign-on, enjoy improvements to custom domains, and more.

IN THIS SECTION:

Upgrade SAML Single Sign-On Framework (Release Update)

Salesforce is upgrading its SAML framework as part of regular maintenance. This update can affect integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, including Identity for Employees and Salesforce Customer Identity, including Experience Cloud. This update was first made available in Summer '22.

Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)

This update restricts users' access to navigation menus in the Experience Cloud sites that they're a member of. This change improves site security by enforcing existing user access permissions when you use an Apex controller in a custom component to query the NavigationLinkSet or NavigationMenuItem objects. Navigation menus that are queried using Connect APIs already enforce user access permissions and are therefore unaffected by this change. This update was first available in Winter '23.

Use Your Certificate to Serve Your Custom Domain in Your Experience Cloud Sites

Now your custom domain can use your HTTPS certificate to serve your Experience Cloud site in Hyperforce. Previously, this feature was unavailable in Hyperforce.

Now you can specify the third-party domains that you trust to frame your Aura or LWR site. For consistency, the labels for adding trusted domains for clickjack protection on Visualforce pages are updated. Previously, the Trusted Domains list was titled Domains, and the Add Trusted Domain button was labeled Add Domain.

To improve your site's security, custom domain subdomains can no longer use cookies set by the custom domain.

If you use Salesforce Edge Network, update your API client callers to include the SNI extension. This extension is required to provide the correct certificate for incoming custom domain requests.

If you use A records that point to IP addresses for your custom domains serving your Experience Cloud site, you can no longer view or use the IP addresses on the Certificate and Key Management page in Setup.

Upgrade SAML Single Sign-On Framework (Release Update)

Salesforce is upgrading its SAML framework as part of regular maintenance. This update can affect integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, including Identity for Employees and Salesforce Customer Identity, including Experience Cloud. This update was first made available in Summer '22.

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 security posture and can increase the platform's performance. Some single sign-on (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 can be affected.

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.

Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)

This update restricts users' access to navigation menus in the Experience Cloud sites that they're a member of. This change improves site security by enforcing existing user access permissions when you use an Apex controller in a custom component to query the NavigationLinkSet or NavigationMenuItem objects. Navigation menus that are queried using Connect APIs already enforce user access permissions and are therefore unaffected by this change. This update was first available in Winter '23.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

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.

How: Before you enable this update in production, we recommend that you test your sites with this update enabled in a sandbox or Developer Edition org.

When this update is activated, only the NavigationLinkSet and the NavigationMenuItem objects from Experience Cloud sites that a user is a member of are returned when a custom component queries them using Apex controllers. After you enable the test run, ensure that custom navigation menus in your sites work as expected for all users. If they don't, make relevant adjustments.

To activate this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites, follow the testing and activation steps.

SEE ALSO:

    Release Updates

Use Your Certificate to Serve Your Custom Domain in Your Experience Cloud Sites

Now your custom domain can use your HTTPS certificate to serve your Experience Cloud site in Hyperforce. Previously, this feature was unavailable in Hyperforce.

Where: This change applies to Aura, LWR, and Visualforce sites and accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:
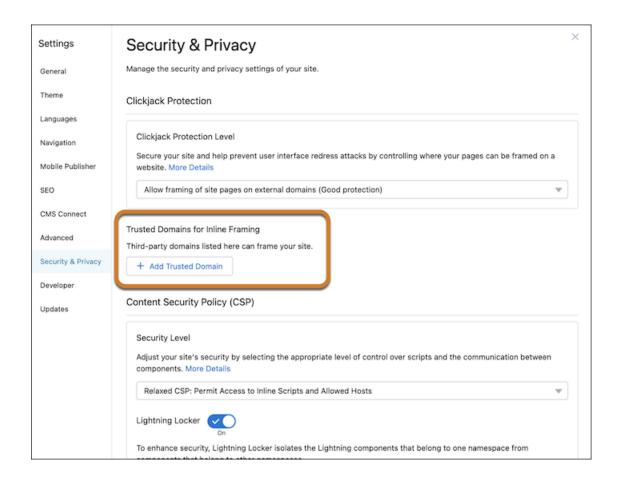
    Serve Your Custom Domain with Your Certificate in Hyperforce

Specify Trusted Domains for Clickjack Protection on Your Site

Now you can specify the third-party domains that you trust to frame your Aura or LWR site. For consistency, the labels for adding trusted domains for clickjack protection on Visualforce pages are updated. Previously, the Trusted Domains list was titled Domains, and the Add Trusted Domain button was labeled Add Domain.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This feature isn't available for enhanced LWR sites.

How: In Experience Builder, select **Settings**, then select **Security & Privacy**. Under Clickjack Protection Level, select **Allow framing of site pages on external domains (good protection)**. To allow a third-party domain to frame your site, click **Add Trusted Domain**.

Test Custom Domain Subdomains That Serve Your Site

To improve your site's security, custom domain subdomains can no longer use cookies set by the custom domain.

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.

Add Server Name Indication (SNI) for Requests to Custom Domains That Serve Your Experience Cloud Site

If you use Salesforce Edge Network, update your API client callers to include the SNI extension. This extension is required to provide the correct certificate for incoming custom domain requests.

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.

SEE ALSO:

Include the Server Name Indicator (SNI) Extension for Custom Domain Requests

IP Addresses Are No Longer Allowed for Domain Certificates That Serve Your Experience Cloud Site

If you use A records that point to IP addresses for your custom domains serving your Experience Cloud site, you can no longer view or use the IP addresses on the Certificate and Key Management page in Setup.

Where: This change applies to Aura, LWR, and Visualforce sites and accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

IP Addresses Are No Longer Allowed for Certificates

Other Changes

Learn about smaller changes that improve Experience Cloud.

IN THIS SECTION:

Manage Cloud Cookies for a Better Experience
Get more control over your cookie experience with documentation that includes more information about individual cookie types and durations.

Updated List of Prohibited HTML Tags and Attributes for CMS Connect
For security, some new tags and attributes are now blocklisted from CMS Connect.

Manage Cloud Cookies for a Better Experience

Get more control over your cookie experience with documentation that includes more information about individual cookie types and durations.

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

SEE ALSO:

Enhance Experience and Performance with Cloud Cookies

Updated List of Prohibited HTML Tags and Attributes for CMS Connect

For security, some new tags and attributes are now blocklisted from CMS Connect.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

These HTML tags and attributes aren't allowed.

Tags

- `<applet>`
- `<base>`
- `<basefont>`
- `<command>`
- `<embed>`
- `<frame>`
- `<frameset>`
- `<iframe>`
- `<keygen>`
- `<link>`
- `<meta>`
- `<noframes>`
- `<noscript>`
- `<object>`
- `<param>`
- `<script>`
- `<title>`

Attributes

- `accept-charset`
- `accesskey`
- `allow`
- `async`
- `autocapitalize`
- `autofocus`
- `autoplay`
- `buffered`
- `challenge`
- `charset`
- `code`
- `codebase`
- `content`
- `contenteditable`
- `contextmenu`
- `controls`
- `data`
- `decoding`
- `defer`

- `dirname`
- `draggable`
- `dropzone`
- `form`
- `formaction`
- `http-equiv`
- `icon`
- `importance`
- `itemprop`
- `keytype`
- `kind`
- `language`
- `lazyload`
- `manifest`
- `minlength`
- `muted`
- `ping`
- `sandbox`
- `scoped`
- `slot`
- `spellcheck`
- `srcdoc`
- `srclang`
- `start`
- `target`
- `translate`
- `wrap`

Note: This list includes tags and attributes that are known to be blocklisted. Some blocklisted tags and attributes may not be listed. Attributes are blocklisted regardless of their value. This list is accurate at the time of this release note. View the current list in Salesforce Help at Before Using CMS Connect

Field Service

Manage assets more intelligently by planning maintenance based on usage or real-world elapsed time between maintenance visits. Smoothly track inventory movement with enhanced serialized products. Check under the hood in the Optimization Hub, with insights such as how your response times and resource utilization improved. Upgrade your scheduling capabilities by creating complex work dependencies and retrieving available appointment times more quickly. Showcase your brand's personality in customized Appointment Assistant messages to your customers. Improve your service by asking for a reason when customers cancel appointments. Envision a custom mobile app for your business, then make it happen with Lightning web components (Beta). And it's easier than ever to use the mobile app with optimized image uploads, deep links to quick actions, and a unified view of the schedule.

IN THIS SECTION:

Field Service Resource Management

Get more capabilities from Enhanced Scheduling and Optimization. Examine the impact of optimization, create more robust scheduling dependencies, and quickly find the next available time slot for your appointment. Nifty travel mode details now appear on the Gantt resource map. You can now switch work between service resources, and leverage the Count work rule type. Start bundling appointments in a flash, and ensure that they have time to be scheduled according to their duration. Allow long bundles to extend over multiple days. Sort bundles by street side for your mobile workers' ease. Monitor the status of your live bundling requests. Protect your data with improved guest user security.

Field Service Asset Management

Assign a serial number to an asset type to track and manage your inventory. Generate work orders on a floating schedule based on the most recent completion date. Use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage. And apply custom logic to the rules based on product characteristics and maintenance conditions.

Field Service Customer Engagement

Appointment Assistant can help you figure out why your customers cancel their appointments. You can also use your own labels in the user interface instead of those provided. And Virtual Remote Assistant now lets you use two-way video sharing, add free text to images, copy and import settings between Salesforce orgs, and link to your own terms of service.

Field Service Mobile

Build the best Field Service app for your business with powerful Lightning web components. See work and absences on the schedule tab in one unified view. Do more and wait less by optimizing image sizes so they upload quickly. Let the app do all the work with improved status changes.

Spotlight on Field Service Content

Streamline Field Service setup with an extended in-app Guidance Center. Watch videos about our new Field Service features.

Field Service Resource Management

Get more capabilities from Enhanced Scheduling and Optimization. Examine the impact of optimization, create more robust scheduling dependencies, and quickly find the next available time slot for your appointment. Nifty travel mode details now appear on the Gantt resource map. You can now switch work between service resources, and leverage the Count work rule type. Start bundling appointments in a flash, and ensure that they have time to be scheduled according to their duration. Allow long bundles to extend over multiple days. Sort bundles by street side for your mobile workers' ease. Monitor the status of your live bundling requests. Protect your data with improved guest user security.

IN THIS SECTION:

Enhanced Scheduling and Optimization

Upgrade your schedule quality by using Enhanced Scheduling and Optimization to examine optimization improvements in a unified hub. Include more service appointments when creating complex work dependencies. Get the first available time slots fast without needing to grade them when scheduling appointments. Easily glance over travel mode details on the Gantt resource map. Resource Scheduling Optimization now supports taking work from one service resource to schedule more efficiently for another and you can now also regulate appointment scheduling using the Count work rule type.

Appointment Bundling

Get the required default policies after enabling the feature. Make sure enough time is allocated for your bundle. Create and schedule multiday appointment bundles. Save time by sorting the bundle members according to the side of the street. Monitor your live bundling requests to check their status.

Tighten Security for Unauthenticated Guest User Scenarios

Create and assign the Field Service Guest User permission set to provide permissions for unauthenticated users to run appointment booking and scheduling actions. Salesforce is improving guest user security, and this new permission set helps you adhere to the security requirements for guest users.

Enhanced Scheduling and Optimization

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IN THIS SECTION:

Explore the Impact of Optimization with Optimization Hub (Generally Available)

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.

Stay on Top of Complex Projects with Enhanced Scheduling and Optimization

Schedule complex work to efficiently account for situations where service appointments are constrained to a specific order, specific resources, or a combination of both. For example, ensure that a particular appointment can't start until a related appointment is complete. Connect up to five related service appointments among service territories using Enhanced Scheduling and Optimization, which now supports complex work. After you create service appointment dependencies, enhanced scheduling and optimization uses all-or-none logic to schedule the entire group of dependent appointments, if room on the schedule allows. Otherwise none of the dependent service appointments is scheduled.

Get Available Time Slots Fast with Gradeless Appointment Booking

Quickly find the first valid, but not necessarily the best, option per appointment slot with Enhanced Scheduling and Optimization. By not specifying objectives in the scheduling policy, the scheduling engine swiftly returns the available time slots for appointments without grading them.

Gain Insights on How a Service Appointment Was Scheduled

Get more information on what service operation caused the most recent change in schedule. Additional options in Schedule Mode, available with Enhanced Scheduling and Optimization, provide more transparency: Manual, Drag and Drop, Schedule, Global Optimization, In-Day Optimization, and Resource Optimization.

View Travel Mode Details Easily on the Gantt Resource Map

The Gantt resource map now shows the travel profile with details such as the vehicle type and the route according to the selected travel mode. For example, quickly see whether the route includes the use of toll roads or whether hazmat considerations exist. Travel modes are applied only to those territories where Enhanced Scheduling and Optimization is enabled.

Get Additional Supported Features with Enhanced Scheduling and Optimization
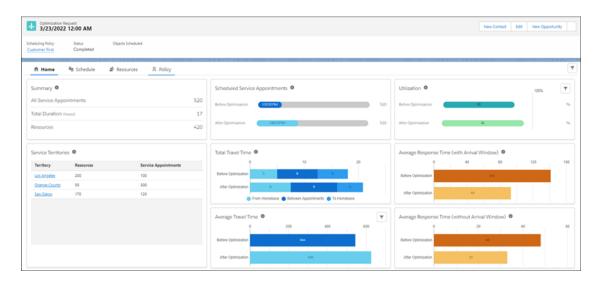
Resource Schedule Optimization now considers candidate service appointments scheduled to other service resources. Fill up your resource's schedule with work more suitable for them so that the work can get done more efficiently. For example, if your resource is in the SoHo area in Manhattan, optimization takes work for the SoHo area from other resources to schedule for that resource. In addition, work rules now support the Count work rule type. Prevent overloading your workers or their vehicles by using a Count work rule type to restrict appointment scheduling based on assignments, hours worked, or a custom value.

Explore the Impact of Optimization with Optimization Hub (Generally Available)

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.

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:
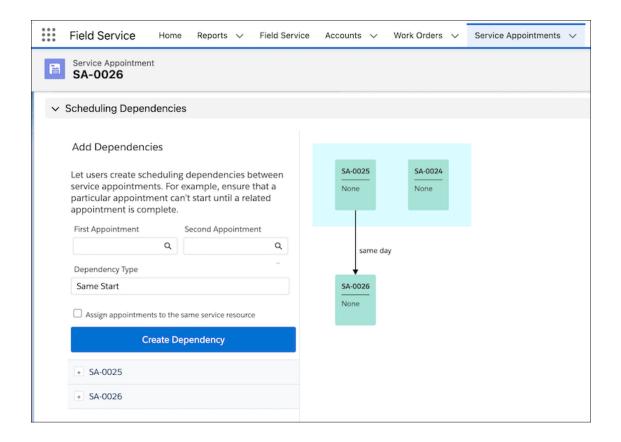
Salesforce Help: Explore Metrics in Optimization Hub (can be outdated or unavailable during release preview)

Stay on Top of Complex Projects with Enhanced Scheduling and Optimization

Schedule complex work to efficiently account for situations where service appointments are constrained to a specific order, specific resources, or a combination of both. For example, ensure that a particular appointment can't start until a related appointment is complete. Connect up to five related service appointments among service territories using Enhanced Scheduling and Optimization, which now supports complex work. After you create service appointment dependencies, enhanced scheduling and optimization uses all-or-none logic to schedule the entire group of dependent appointments, if room on the schedule allows. Otherwise none of the dependent service appointments is scheduled.

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 and set up the service territories that use enhanced scheduling. Then create scheduling dependencies between service appointments.

Salesforce Help: Create Scheduling Dependencies Between Service Appointments (can be outdated or unavailable during release preview)

Salesforce Help: Get Ready for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Salesforce Video: Complex Work

Get Available Time Slots Fast with Gradeless Appointment Booking

Quickly find the first valid, but not necessarily the best, option per appointment slot with Enhanced Scheduling and Optimization. By not specifying objectives in the scheduling policy, the scheduling engine swiftly returns the available time slots for appointments without grading them.

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

Salesforce Help: Get Ready for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Gain Insights on How a Service Appointment Was Scheduled

Get more information on what service operation caused the most recent change in schedule. Additional options in Schedule Mode, available with Enhanced Scheduling and Optimization, provide more transparency: Manual, Drag and Drop, Schedule, Global Optimization, In-Day Optimization, and Resource Optimization.

Where: This change applies to 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. Schedule Mode appears on the service appointment record.

SEE ALSO:
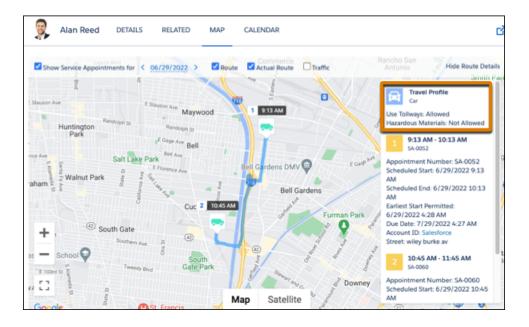
> *Salesforce Help*: Get Ready for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

View Travel Mode Details Easily on the Gantt Resource Map

The Gantt resource map now shows the travel profile with details such as the vehicle type and the route according to the selected travel mode. For example, quickly see whether the route includes the use of toll roads or whether hazmat considerations exist. 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: The travel profile is shown if Enhanced Scheduling and Optimization is enabled in Field Service Settings and a travel mode is assigned to that territory or territory member.

SEE ALSO:

> *Salesforce Help*: Get Ready for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)
> *Salesforce Help*: Set Up Enhanced Optimization per Territory (can be outdated or unavailable during release preview)
> *Salesforce Help*: Set Up Travel Modes (can be outdated or unavailable during release preview)

Get Additional Supported Features with Enhanced Scheduling and Optimization

Resource Schedule Optimization now considers candidate service appointments scheduled to other service resources. Fill up your resource's schedule with work more suitable for them so that the work can get done more efficiently. For example, if your resource is in the SoHo area in Manhattan, optimization takes work for the SoHo area from other resources to schedule for that resource. In addition, work rules now support the Count work rule type. Prevent overloading your workers or their vehicles by using a Count work rule type to restrict appointment scheduling based on assignments, hours worked, or a custom value.

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

How: To enable Enhanced Scheduling and Optimization, go to Field Service Settings and select **Field Service Integration** and **Field Service Enhanced Scheduling and Optimization**.

SEE ALSO:

 Salesforce Help: Get Ready for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

 Salesforce Help: Work Rule Type: Count Rule (can be outdated or unavailable during release preview)

Appointment Bundling

Get the required default policies after enabling the feature. Make sure enough time is allocated for your bundle. Create and schedule multiday appointment bundles. Save time by sorting the bundle members according to the side of the street. Monitor your live bundling requests to check their status.

IN THIS SECTION:

Start Bundling Appointments Quickly

After you enable Appointment Bundling, your dispatcher can start bundling appointments right away. Field Service gives you all the default configuration that you need to get going. Use the default configuration or modify it to fit your company's needs.

Make Sure Your Bundle Fits in the Schedule

Check whether the bundle's duration is longer than the time allocated for it. If there isn't enough time to complete the bundle, the duration is replaced with a predefined value.

Bundle Appointments Over Multiple Days

Create long bundles and schedule them to span over multiple days. Previously, all appointments in a bundle had to be on the same day, which resulted in more bundles. You can now add multiday appointments to your bundle or make the bundle service appointment a multiday appointment.

Sort the Bundle According to the Side of the Street

Save your mobile workers time when completing a bundle. Let them complete all the appointments on one side of the street before continuing to the other side.

Keep an Eye on All Your Automatic Bundling Requests

To monitor the status of your automatic bundling requests, click the light bulb in the Dispatcher Console or go to the Optimization Requests tab. Previously, you could monitor only your automated bundling requests. Now you can keep track of both types of automatic bundling, automated and live.

Start Bundling Appointments Quickly

After you enable Appointment Bundling, your dispatcher can start bundling appointments right away. Field Service gives you all the default configuration that you need to get going. Use the default configuration or modify it to fit your company's needs.

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

How: From Field Service Settings, enable Appointment Bundling. The default policies are created and can be accessed from the App Launcher.

SEE ALSO:
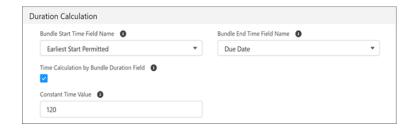
Salesforce Help: Enable Service Appointment Bundling (can be outdated or unavailable during release preview)

Make Sure Your Bundle Fits in the Schedule

Check whether the bundle's duration is longer than the time allocated for it. If there isn't enough time to complete the bundle, the duration is replaced with a predefined value.

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 the Duration Calculation section of the bundle policy, select the checkbox and complete the remaining fields. For example, set the bundle policy to calculate the time between the bundle member with the latest permitted start time and the bundle member with the earliest due date. If that amount of time is shorter than the bundle's duration, replace the duration with a constant value of 120 minutes.

SEE ALSO:

Salesforce Help: Create an Appointment Bundle Policy (can be outdated or unavailable during release preview)

Bundle Appointments Over Multiple Days

Create long bundles and schedule them to span over multiple days. Previously, all appointments in a bundle had to be on the same day, which resulted in more bundles. You can now add multiday appointments to your bundle or make the bundle service appointment a multiday appointment.

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: Create an aggregation policy for the Is MultiDay field. If Is Multiday is selected in at least one of the bundle members, mark the bundle as a multiday appointment.

SEE ALSO:

Salesforce Help: Enable Multiday Service Appointments (can be outdated or unavailable during release preview)

Sort the Bundle According to the Side of the Street

Save your mobile workers time when completing a bundle. Let them complete all the appointments on one side of the street before continuing to the other side.

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: Create a sort policy with a formula field that identifies the odd and even numbers on a street.

SEE ALSO:

    Salesforce Help: Create an Appointment Bundle Sort Policy (can be outdated or unavailable during release preview)

Keep an Eye on All Your Automatic Bundling Requests

To monitor the status of your automatic bundling requests, click the light bulb in the Dispatcher Console or go to the Optimization Requests tab. Previously, you could monitor only your automated bundling requests. Now you can keep track of both types of automatic bundling, automated and live.

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 Live Bundling picklist value for the Type field. If you're upgrading Field Service from a previous version, the picklist value must be created.

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)
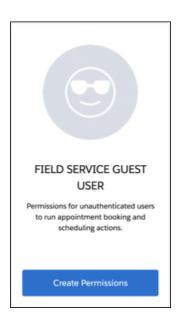
Tighten Security for Unauthenticated Guest User Scenarios

Create and assign the Field Service Guest User permission set to provide permissions for unauthenticated users to run appointment booking and scheduling actions. Salesforce is improving guest user security, and this new permission set helps you adhere to the security requirements for guest users.

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

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. If you're affected, Salesforce Customer Support contacts you directly about your process and timeframe for the update.

How: In the Field Service Admin app, Field Service Settings tab, click **Getting Started**, and then click **Permission Sets**. On the Field Service Guest User tile, click **Create Permissions** or **Update Permissions**.

Field Service Asset Management

Assign a serial number to an asset type to track and manage your inventory. Generate work orders on a floating schedule based on the most recent completion date. Use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage. And apply custom logic to the rules based on product characteristics and maintenance conditions.

IN THIS SECTION:

Streamline Product Management with Enhanced Serialized Product Support

Create one product transfer for each type of serialized product instead of multiple product transfers for each item. After the transfer, your inventory is updated with the quantity, status, and location of your inventory. Your service technicians use the mobile app to scan the barcode as they receive each item. And your inventory quantity, status, and location is updated.

Add Flexibility to Work Order Generation (Generally Available)

On maintenance plans, generate recurring work orders on a floating schedule based on the most recent completion date. Work orders completed ahead of or behind schedule generate the subsequent work order based on the recurrence cadence. For example, a floating work order with a six month recurrence cadence that's completed in May is next scheduled for November. With a fixed schedule, recurring work orders are scheduled at exact intervals based on the work order start date.

Schedule Usage-Based Maintenance Automatically (Generally Available)

Eliminate tedious tasks and ensure that important asset maintenance occurs on time. Use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage. For example, schedule service automatically when an asset reaches mileage

Work Smarter with Custom Logic

Prioritize how maintenance work gets done. Define custom logic with parentheses and the AND and OR Boolean operators, for example 1 AND (2 OR 3). If you add another condition, the custom logic is updated automatically to 1 AND (2 OR 3) AND 4.

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 available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Spring '23.

Streamline Product Management with Enhanced Serialized Product Support

Create one product transfer for each type of serialized product instead of multiple product transfers for each item. After the transfer, your inventory is updated with the quantity, status, and location of your inventory. Your service technicians use the mobile app to scan the barcode as they receive each item. And your inventory quantity, status, and location is updated.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

   Salesforce Help: Learn About Serialized Products (can be outdated or unavailable during release preview)

   Salesforce Video: Serialized Products

Add Flexibility to Work Order Generation (Generally Available)

On maintenance plans, generate recurring work orders on a floating schedule based on the most recent completion date. Work orders completed ahead of or behind schedule generate the subsequent work order based on the recurrence cadence. For example, a floating work order with a six month recurrence cadence that's completed in May is next scheduled for November. With a fixed schedule, recurring work orders are scheduled at exact intervals based on the work order start date.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

   Salesforce Help: Guidelines for Maintenance Work Rules (can be outdated or unavailable during release preview)

   Salesforce Video: Usage-based Preventive Maintenance: Floating Work Orders

Schedule Usage-Based Maintenance Automatically (Generally Available)

Eliminate tedious tasks and ensure that important asset maintenance occurs on time. Use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage. For example, schedule service automatically when an asset reaches mileage

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

How: Create a maintenance plan and add the covered assets. Then add the work rules to schedule maintenance for the plan's assets.
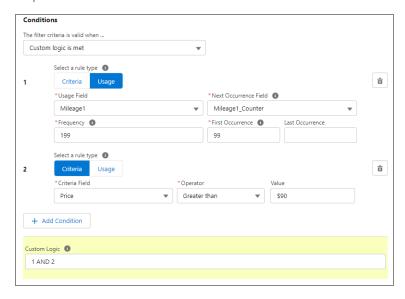
SEE ALSO:

   Salesforce Help: Guidelines for Preventive Maintenance (can be outdated or unavailable during release preview)

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Prioritize how maintenance work gets done. Define custom logic with parentheses and the AND and OR Boolean operators, for example 1 AND (2 OR 3). If you add another condition, the custom logic is updated automatically to 1 AND (2 OR 3) AND 4.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

How: Create a usage-based maintenance plan and add recordset filter criteria. Then define the conditions that trigger maintenance for the plan's assets.

SEE ALSO:

Salesforce Help: Guidelines for Preventive Maintenance (can be outdated or unavailable during release preview)

Salesforce Video: Preventive Maintenance: Custom Logic

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 available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Spring '23.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, 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: The Maintenance Plan Frequency and Frequency Type fields will not be accessible in the UX in Spring '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 Spring '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.

SEE ALSO:

    Salesforce Help: Release Updates

    Salesforce Knowledge Article: Migration Retirement Migration Retirement Tips and Tricks

    Salesforce Knowledge Article: Get Excited about Using Maintenance Work Rules

    Salesforce Video: Spotlight on Implementing Preventative Maintenance

Field Service Customer Engagement

Appointment Assistant can help you figure out why your customers cancel their appointments. You can also use your own labels in the user interface instead of those provided. And Virtual Remote Assistant now lets you use two-way video sharing, add free text to images, copy and import settings between Salesforce orgs, and link to your own terms of service.

IN THIS SECTION:

Appointment Assistant

Gather information about why customers cancel their appointments. And adapt the language used in Appointment Assistant to suit your company's culture.

Visual Remote Assistant

Enhance Visual Remote Assistant by sharing your screen during video meetings, adding free text to images, copying and importing the settings between Salesforce orgs, and configuring the terms of service.

Appointment Assistant

Gather information about why customers cancel their appointments. And adapt the language used in Appointment Assistant to suit your company's culture.

IN THIS SECTION:

Find Out Why Customers Cancel Their Appointments

Ask your customers to provide a reason for canceling their appointment. Collecting this information can help you figure out why customers cancel appointments so that you can find ways to minimize these cancellations.

Personalize Your Appointment Assistant Experience
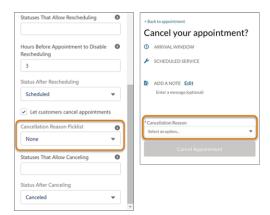
Modify the Appointment Assistant labels in the user interface to better suit your company's culture. For example, change the term Team Member to Technician.

Find Out Why Customers Cancel Their Appointments

Ask your customers to provide a reason for canceling their appointment. Collecting this information can help you figure out why customers cancel appointments so that you can find ways to minimize these cancellations.

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: From the Self-Service Scheduling settings, select a custom or standard picklist field from the Service Appointment object. The field contains the cancellation reasons. If you select None, the customer isn't asked for a cancellation reason.

SEE ALSO:

 Salesforce Help: Add Self-Service Scheduling to Your Experience Builder Site (can be outdated or unavailable during release preview)

Personalize Your Appointment Assistant Experience

Modify the Appointment Assistant labels in the user interface to better suit your company's culture. For example, change the term Team Member to Technician.

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: Edit the required values in Custom Labels in Setup.

SEE ALSO:

 Salesforce Video: Appointment Assistant - Personalization (can be outdated or unavailable during release preview)

Visual Remote Assistant

Enhance Visual Remote Assistant by sharing your screen during video meetings, adding free text to images, copying and importing the settings between Salesforce orgs, and configuring the terms of service.

IN THIS SECTION:

Benefit from Screen Sharing During a Remote Visual Session

Improve collaboration with customers and boost your sales with screen-sharing capabilities during a two-way video session. The agent or the customer can share their screen to easily troubleshoot and solve customer issues. Both participants in the call must be connected via desktop for screen sharing.

Enhance Images with Text Annotation

Add text to images to classify and tag content, record and track customer issues, or to improve troubleshooting. Agents can add the text using the Visual Dashboard and then share the image with the customer.

Migrate the Visual Remote Assistant Settings

Save time and avoid errors by copying the Visual Remote Assistant account settings. Use the account management settings to copy and import settings between Salesforce orgs, for example, between sandbox and production.

Customize Your Terms of Service

Add your own specifics to the Terms of Service to suit your business needs. For example, ensure customers understand your Terms of Service in their own languages. The mobile user acknowledges the Terms of Service when initiating a Visual Remote Assistant session.

Blur the Background on Two-Way Video Calls (Beta)

Make your agents' background blurry on two-way video calls to ensure that their surrounding isn't getting in the way of having a productive conversation.

Benefit from Screen Sharing During a Remote Visual Session

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Blur the Background on Two-Way Video Calls (Beta)

Make your agents' background blurry on two-way video calls to ensure that their surrounding isn't getting in the way of having a productive conversation.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer 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.

Field Service Mobile

Build the best Field Service app for your business with powerful Lightning web components. See work and absences on the schedule tab in one unified view. Do more and wait less by optimizing image sizes so they upload quickly. Let the app do all the work with improved status changes.

IN THIS SECTION:

Extend and Customize the Field Service Mobile App with Lightning Web Components (Beta)

Create amazing experiences for your mobile app users with Lightning web components. Use standard components to build robust guided procedures, create specialized documents with prefilled data from work orders, or bring your vision to life by building your own custom components.

Where: This feature is available in the Field Service mobile app for Android and iOS.

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

How: In this example, a Lightning web component is used to display a list of parts. You can search the table for specific parts (1), tap a column header once to sort ascending, then tap it again to sort descending (2), or tap a part name to view associated child records (3).
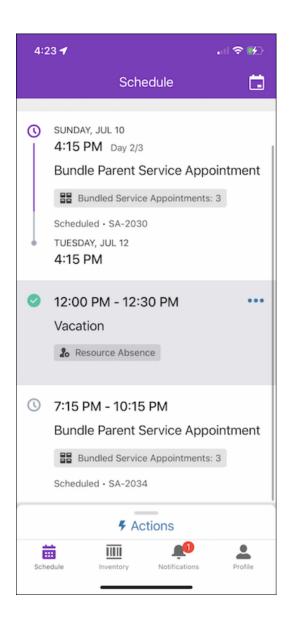
Show Absences and Work Together in the Schedule (Generally Available)

Give users a unified view of their schedule without switching between tabs. Choose whether resource absences appear on the Schedule tab of the Field Service mobile app along with service appointments and work orders. This setting doesn't affect desktop users. This feature, which is now generally available, includes some updates since the last release to make the design more consistent across Android and iOS devices.

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

How: From Setup, edit any Field Service Mobile Settings configuration. Then turn on **Display resource absences in the Schedule page**. Absences are added only to calendar-based service appointment list views.

Salesforce Help: Create Resource Absences in the Field Service Mobile App (can be outdated or unavailable during release preview)

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

Upload Images Faster with Optimized Image Upload

Mobile workers can quickly upload images by letting the app resize images before upload. Now there's less wait time, especially in areas of low network connectivity.

Where: This feature is available in the Field Service mobile app for Android and iOS.

How: From Connected Apps, set the value of the MAX_IMAGE_UPLOAD_SIZE custom attribute to 0.2 MB and above. If no value is set, images aren't optimized and can take longer to upload.

SEE ALSO:

Salesforce Help: Set Up Optimized Image Upload (can be outdated or unavailable during release preview)

Ease App Switching and Save Time with Deep Link Global Actions

Deep link global actions expand deep linking beyond records and let you launch any action in the Field Service mobile app. Now you can create more intuitive workflows between apps by eliminating navigation steps and extra taps.

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

How: Create a deep link from any mobile application to launch a global action in the Field Service app. For example, use a deep link to open the Field Service app to immediately launch an action to create a work order.

SEE ALSO:

Salesforce Developers: Deep Linking Schema (can be outdated or unavailable during release preview)

Get Better Automatic Status Updates When Using Drip Feed

Relieve your mobile workers from updating the appointment's status at the beginning of the day. If you're using drip feed to dispatch even one appointment at a time, the Travel status now automatically updates.

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

SEE ALSO:

Salesforce Help: Automatic Status Change (can be outdated or unavailable during release preview)

Spotlight on Field Service Content

Streamline Field Service setup with an extended in-app Guidance Center. Watch videos about our new Field Service features.

IN THIS SECTION:

Get More Guidance to Set Up Field Service

More topics and new videos give clear-cut steps to set up Field Service. Guidance Center topics now account for setup dependencies so you can tackle tasks in the right order. Watch videos to help you install the managed package, install the connected app, and create users and permission sets.

Watch Videos

New instructional videos help your users learn about new and improved Field Service features.

Get More Guidance to Set Up Field Service

More topics and new videos give clear-cut steps to set up Field Service. Guidance Center topics now account for setup dependencies so you can tackle tasks in the right order. Watch videos to help you install the managed package, install the connected app, and create users and permission sets.

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

Who: System admins who've ordered licenses in the last 180 days.

How: In Lightning experience, click the Trailhead icon to open the Guidance Center.

SEE ALSO:

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

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

Watch Videos

New instructional videos help your users learn about new and improved Field Service features.

- The Serialized Products video shows how to use serialized products to track transfers and products consumed.

- The Usage-based Preventive Maintenance: Floating Work Orders video shows how to use maintenance work rules to generate work orders and schedule preventive maintenance based on asset usage.

- The Preventive Maintenance: Custom Logic video shows how to define maintenance work rules based on product characteristics and maintenance conditions.

- The Appointment Assistant - Personalization video shows how to modify the Appointment Assistant labels to better suit your company's culture.

- The Complex Work video shows how to use scheduling dependencies to stay on top of related service appointments.

Hyperforce

Hyperforce is the trusted foundation of the Salesforce Customer Engagement Platform.With Hyperforce, you can scale globally while meeting local compliance regulations on a foundation of security, privacy, and agility.

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.

Starting in November, you can upgrade to Hyperforce with help from Hyperforce Assistant. To use the assistant, you must be scheduled for an upgrade to Hyperforce through a mass org migration (MOM). You can launch Hyperforce Assistant via in-app prompts or you can select it manually.

Access Salesforce in More Regions with Hyperforce

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Where: Delivery via Hyperforce of the Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is available in Australia, Canada, France, Germany, India, Japan, Singapore, and the United States. The Salesforce Customer 360 application suite is available on Hyperforce by request only in the United Kingdom. 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
Marketing	Marketing Cloud Engagement	Marketing Cloud Engagement helps build customer relationships efficiently with personalized marketing messages and automated journeys.	India
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, 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.	Australia, Brazil, Canada, France, Germany, India, Japan, Singapore, United States

Migrate to Hyperforce with Hyperforce Assistant

Starting in November, you can upgrade to Hyperforce with help from Hyperforce Assistant. To use the assistant, you must be scheduled for an upgrade to Hyperforce through a mass org migration (MOM). You can launch Hyperforce Assistant via in-app prompts or you can select it manually.

Where: Hyperforce Assistant is available in Lightning Experience and Salesforce Classic in all editions.

When: Hyperforce Assistant is available starting in November 2022.

How: After you schedule your upgrade, you're prompted to launch the assistant. If you don't see the prompt but are scheduled for an MOM, manually launch the assistant. From Setup, in the Quick Find Box, enter `Hyperforce Assistant` and then select **Hyperforce Assistant**.

Industries

Accelerate productivity and drive customer success with Automotive Cloud, launching as generally available this release. Gain critical insights into your company's carbon footprint with Net Zero Cloud. Build stronger relationships with partner visits and the Service Console for Manufacturing. Get started quickly with more guided setups in Financial Services Cloud. Public Sector Solutions offers composable case management to help caseworkers deliver custom services that result in successful outcomes for individuals and families.

IN THIS SECTION:

Automotive Cloud (Generally Available)

Drive lightning-speed growth of your automotive company with the all-new Automotive Cloud. Automotive Cloud empowers automotive companies, such as original equipment manufacturers (OEMs) and dealers, to transform the experience of their customers and partners. Get 360-degree visibility into your customers and vehicles, build a robust sales pipeline, intelligently manage your product portfolio, deliver meaningful service experiences, and nurture meaningful relationships with stakeholders in the automotive ecosystem.

Consumer Goods Cloud

Integrate your digital operations quickly using MuleSoft Accelerator for Consumer Goods. And with the Analytics for Consumer Goods - Advanced Data Model app, get insights on territory, account, and sales rep performance.

Financial Services Cloud

The Actionable Relationship Center shows more information with fewer clicks and is easier to set up with new templates. Streamline the Group Builder Edit window to show only the sections and fields that your users need. Maximize review and minimize customer churn with the new CRM Analytics templates for Retail Banking and Wealth Management.

Health Cloud

Health Cloud offers new and improved solutions that help make your operations run smoother and better. Health Cloud has a new flavor designed for key use cases in the Life Sciences segment. Advanced Therapy Management is a new solution that helps therapy coordinators book multiple appointments across multiple sites at one go. Virtual Care now integrates with Amazon Chime to offer your users an easy-to-use, feature-rich video platform. Make video visits even more convenient for patients by providing self-service scheduling and easy access links to the video platform. The Discovery Framework powers Assessments that provide a clearer picture of a patient's health. Provider Search transforms provider data into a searchable format using Data Processing Engine to improve performance and scalability. Medication Therapy Management helps pharmacists conduct comprehensive and targeted medication reviews that help improve medication adherence and patient safety. Utilization Management helps your users to review prior authorization requests with ease. Unified Health Scoring adds support for Enhanced Timeline to display action history.

Loyalty Management

Use templates to get a head start on designing everyday processes for your loyalty programs. Use a single Business API to run your processes. Put widgets on your website to drive enrollment and give members a quick view of their membership details. Recognize member achievement by assigning badges. Automatically merge and unmerge memberships. Get a simplified view of a member's promotion eligibility. Use field values instead of referenced object record IDs in APIs. Design flows that cancel accrual and redemption transactions. Use rules in loyalty program processes to create and update records, to add steps between existing steps, and to pick Loyalty Management field values as action inputs.

Manufacturing Cloud

Do more with enhancements to Sales Agreements and Advanced Account Forecasts and build strong relationships with the new Service Console for Manufacturing and Partner Visit Management capabilities. Define sales agreements with weekly schedules. Mass update multiple values in Advanced Account Forecasts and view the necessary forecast information with advanced filters. Use Service Console for Manufacturing to deliver a seamless service experience to your customers. Enhance collaboration with your manufacturing partners by helping sales managers schedule effective visits and field reps complete visit tasks.

Public Sector Solutions

Get closer to your constituents by understanding their lives, relationships, and history with your agencies. Add enrollees with greater ease and add tasks to your care plans. Configure more of your org with ease with new assistants in Guided Setup. Give constituents insights into the reasoning behind application decisions.

Net Zero Cloud

Exceed your business goals by tracking your loaded reference data, managing carbon credits, and monitoring water-related activities. You can also calculate a supplier's quantity-based emissions and set object-level permissions.

Industries: Common Components

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, we've enhanced filtering and performance for the data processing engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex classes for loyalty management, and much more.

Automotive Cloud (Generally Available)

Drive lightning-speed growth of your automotive company with the all-new Automotive Cloud. Automotive Cloud empowers automotive companies, such as original equipment manufacturers (OEMs) and dealers, to transform the experience of their customers and partners. Get 360-degree visibility into your customers and vehicles, build a robust sales pipeline, intelligently manage your product portfolio, deliver meaningful service experiences, and nurture meaningful relationships with stakeholders in the automotive ecosystem.

IN THIS SECTION:

Accelerate Growth and Steer Customer Success with Automotive Cloud

Use Automotive Cloud to create a smart, resilient, and connected business experience across sales, service, operations, and vehicle management.

Automotive Lead Management

Increase your lead conversion rates and build a strong pipeline of opportunities by using Automotive Cloud's lead management capabilities. Record the period during which leads are interested in a transaction and qualify the leads accordingly. Personalize engagement with leads by capturing granular information, and route leads to the appropriate dealers. You can capture information such as a lead's desired products, type of transaction, and condition of products by using lead line items. Relate a lead to the lead's preferred dealer and the lead's source by using lead preferred sellers to optimize lead qualification, distribution, and conversion. When you convert a lead, information about the lead's desired products, preferred dealers, and lead providers transfer over to the converted opportunity. You can easily access the lead's preferences through the entire lead and opportunity lifecycle.

Vehicle and Asset Management

Manage your product portfolio with simplicity and versatility. You can capture granular information about each item in the automotive lifecycle, such as vehicles, parts, and accessories. Use the comprehensive, extensible Vehicle page to view details about a vehicle and track related parts and accessories. Supercharge users' productivity by giving them easy access to information about stakeholders, important events, key changes, and more on the Vehicle page.

Stakeholder Management

Capture and use information about stakeholders involved in the automotive lifecycle with flexibility and ease. Create business profiles to record granular details about automotive dealers, such as the operating name, reference number, service type, and region. Link physical assets, such as vehicles and accessories, with the accounts and contacts of related stakeholders by using Asset Account Participant and Asset Contact Participant records. Get visibility into the cumulative lifetime purchases of various types of groups, such as households and co-operatives, by using Party Relationship Groups.

Customer Service Management

Customize every step of your service journey to make the experience more intelligent and connected for your dealers and customers. Customer service reps can use the Service Console for Automotive to holistically manage the customer service experience. The Service Excellence components help you deliver exceptional service interactions that increases customer satisfaction and customer lifetime value.

Dealer Performance Management

Original equipment manufacturers (OEMs) and dealers can use Automotive Cloud to collaborate better and achieve common goals. Dealers can create retail delivery reports (RDRs) to report sales of vehicles to OEMs. Dealers can also submit proof-of-sales for parts and accessories. OEMs can use the information for rebate calculations and analytics. OEMs and dealers can use sales agreements, forecasts, targets, and program-based business for greater accuracy, predictability, and alignment. OEMs can plan effective visits to dealers and ensure dealer compliance, analyze dealer performance, and upsell products. OEMs and dealers can also use CRM Analytics dashboards to show actionable insights on dealer performance, sales lifecycle, revenue trends, and more.

New Metadata Types for Automotive Cloud

Make the most of the new metadata types of Automotive Cloud.

New and Changed Objects for Automotive Cloud

Do more with the new and changed objects in Automotive Cloud.

Accelerate Growth and Steer Customer Success with Automotive Cloud

Use Automotive Cloud to create a smart, resilient, and connected business experience across sales, service, operations, and vehicle management.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Why: Enhance lead generation, qualification, and conversion. Capture granular details about leads' preferences, configure personalized and timely engagements, and set up targeted distribution.

Manage your product portfolio, including vehicles, parts, and accessories effectively. Get a holistic view of your customers and vehicles. Get visibility into all stakeholders during a vehicle's lifecycle and cultivate deeper, long-term relationships with the stakeholders. Enhance user experience by using the Events and Milestones, Timeline, Relationship Cards, Actionable Relationship Center, Record Alerts, Action Plans, and Interest Tags components.

Deliver a proactive and memorable service experience to boost customer loyalty and satisfaction. Collaborate closely with your partners by planning productive visits. Bring predictability and accuracy to your processes by using sales agreements, account manager targets, advanced account forecasting, and program-based business. Use CRM Analytics dashboards to gain actionable, relevant insights.

Automotive Lead Management

Increase your lead conversion rates and build a strong pipeline of opportunities by using Automotive Cloud's lead management capabilities. Record the period during which leads are interested in a transaction and qualify the leads accordingly. Personalize engagement with leads by capturing granular information, and route leads to the appropriate dealers. You can capture information such as a lead's desired products, type of transaction, and condition of products by using lead line items. Relate a lead to the lead's preferred dealer and the lead's source by using lead preferred sellers to optimize lead qualification, distribution, and conversion. When you convert a lead, information about the lead's desired products, preferred dealers, and lead providers transfer over to the converted opportunity. You can easily access the lead's preferences through the entire lead and opportunity lifecycle.

IN THIS SECTION:

Know When Your Lead Is Interested

Qualify a lead at the appropriate time by recording the period during which a lead is interested in a business transaction. For example, a lead is interested in buying a new car before the current month ends and in buying a new entertainment system for the car next year. A dealer can record the information and contact the lead at the appropriate time. Use the Earliest Interest Date and Latest Interest Date fields on a Lead record to capture the interest period.

Capture Item-Level Information for Leads

Record granular, relevant details about leads' interests in the Product related list of a Lead record so that original equipment manufacturers can distribute the leads to relevant dealers. Dealers can customize their engagements to match the lead's interests. Create lead line items for leads and then record details, such as the desired asset and the asset's identification number, transaction type, quantity, price, and condition. After the lead gets converted to an opportunity, the details in the lead line item are transferred to the new opportunity line item.

Record Information About Lead Providers and Preferred Dealers

A customer can prefer a particular dealer for various reasons, such as previous interactions or living close to the dealer's location. In such cases, original equipment manufacturers (OEMs) can relate a lead to the lead's preferred dealer. OEMs can also relate leads to lead providers, such as digital marketing agencies, to assess the quality of leads generated from various sources.

Convert Leads Into Opportunities with Line Items and Preferred Sellers
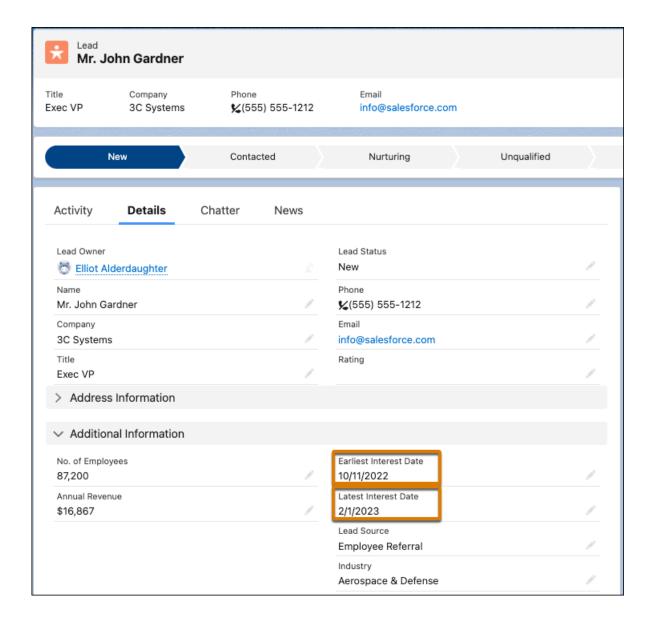
Get visibility into a prospective customer's preferred products and dealers as you move leads through your sales pipeline. When you convert a lead to an opportunity, related lead line items automatically convert to opportunity line items and lead preferred sellers convert to opportunity preferred sellers.

Know When Your Lead Is Interested

Qualify a lead at the appropriate time by recording the period during which a lead is interested in a business transaction. For example, a lead is interested in buying a new car before the current month ends and in buying a new entertainment system for the car next year. A dealer can record the information and contact the lead at the appropriate time. Use the Earliest Interest Date and Latest Interest Date fields on a Lead record to capture the interest period.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Partner Lead Management are enabled.

Who: This feature is available only to users who have the Partner Lead Management permission set.

Capture Item-Level Information for Leads

Record granular, relevant details about leads' interests in the Product related list of a Lead record so that original equipment manufacturers can distribute the leads to relevant dealers. Dealers can customize their engagements to match the lead's interests. Create lead line items for leads and then record details, such as the desired asset and the asset's identification number, transaction type, quantity, price, and condition. After the lead gets converted to an opportunity, the details in the lead line item are transferred to the new opportunity line item.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Partner Lead Management are enabled.

Who: This feature is available only to users who have the Partner Lead Management permission set.

SEE ALSO:

Salesforce Help: Create Lead Line Items(can be outdated or unavailable during release preview)
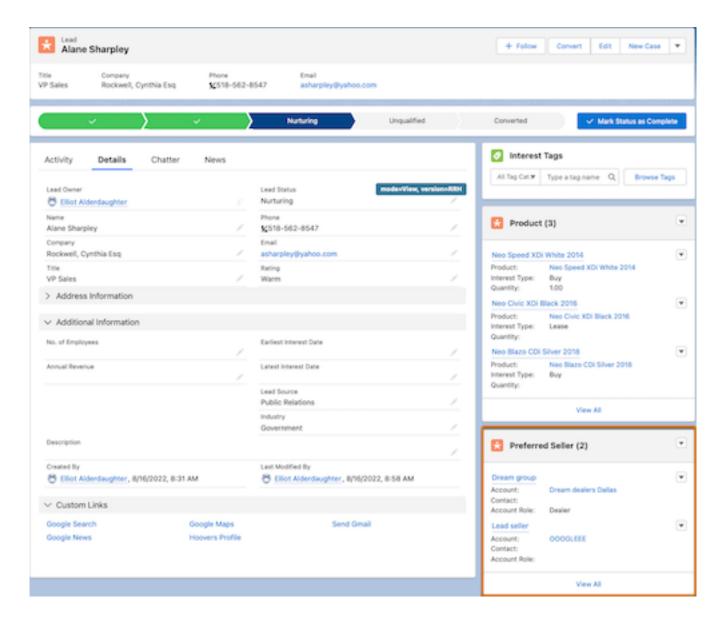
Record Information About Lead Providers and Preferred Dealers

A customer can prefer a particular dealer for various reasons, such as previous interactions or living close to the dealer's location. In such cases, original equipment manufacturers (OEMs) can relate a lead to the lead's preferred dealer. OEMs can also relate leads to lead providers, such as digital marketing agencies, to assess the quality of leads generated from various sources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Partner Lead Management are enabled.

Who: This feature is available only to users who have the Partner Lead Management permission set.

How: On the Preferred Sellers related list of a Lead record, create a Lead Preferred Seller record, and then specify the details of a lead's preferred dealer or lead provider.

SEE ALSO:

Salesforce Help: Create Lead Preferred Sellers(can be outdated or unavailable during release preview)

Convert Leads Into Opportunities with Line Items and Preferred Sellers

Get visibility into a prospective customer's preferred products and dealers as you move leads through your sales pipeline. When you convert a lead to an opportunity, related lead line items automatically convert to opportunity line items and lead preferred sellers convert to opportunity preferred sellers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Partner Lead Management are enabled.

Who: This feature is available only to users who have the Partner Lead Management permission set.

How: Use the ObjectHierarchyRelationship Metadata API to map fields between Lead Line Item and Opportunity Line Item, and between Lead Preferred Seller and Opportunity Preferred Seller. Create and map custom fields between the objects as necessary.

SEE ALSO:

Salesforce Help: Convert Leads Into Opportunities and Distribute with Dealers(can be outdated or unavailable during release preview)

Vehicle and Asset Management

Manage your product portfolio with simplicity and versatility. You can capture granular information about each item in the automotive lifecycle, such as vehicles, parts, and accessories. Use the comprehensive, extensible Vehicle page to view details about a vehicle and track related parts and accessories. Supercharge users' productivity by giving them easy access to information about stakeholders, important events, key changes, and more on the Vehicle page.

IN THIS SECTION:

Capture Granular Details About Vehicles

Track each vehicle in your product portfolio by creating Product records and then record information, such as the vehicle's model name, model year, make name, and trim type. Create Vehicle Definitions to record additional specifications about vehicle models, such as the vehicle's fuel economy details, engine details, dimensions, and speed details. Additionally, create Product records for parts and accessories, and record details, such as manufacturer part number, universal product code, and availability date.

Manage Automotive Assets

An asset is a physical item that you manufacture, sell, or install. An asset can be a vehicle, a part, such as the engine and the chassis, or a standalone accessory, such as the entertainment system or the navigation system. Create asset records to capture key details such as, price, quantity, purchase and installation dates. Associate related accounts, contacts, and products to asset records. You can also capture the hierarchy of assets to view parent and child assets. And by using asset relationships, you can track upgrades and replacements for an asset.

Get a Holistic View of a Vehicle

Use the Vehicle page to view all the information related to a vehicle in one page. Capture information about each vehicle that's manufactured, stocked, or sold. Record details, such as the vehicle identification number (VIN), odometer reading, market price, registration details, features, and service details. Get visibility into installed parts and accessories of a vehicle as well as compatible parts and accessories that you can recommend or upsell. Track warranties related to a vehicle and the vehicle's parts and accessories. View the hierarchy of assets related to a vehicle. View a vehicle and the vehicle parts' replacement, upgrade, or crossgrade assets.

Know More About a Vehicle

Enhance your visibility into a vehicle's lifecycle with information about related stakeholders, important events, record changes, and more. Easily customize the Vehicle page with additional components to enrich your users' experience.

Track Products and Locations

Track products, product locations, and product movement with Automotive Cloud. Create Associated Location, Product Item, Product Item Transfer, and Product Request records to monitor your inventory.

Capture Granular Details About Vehicles
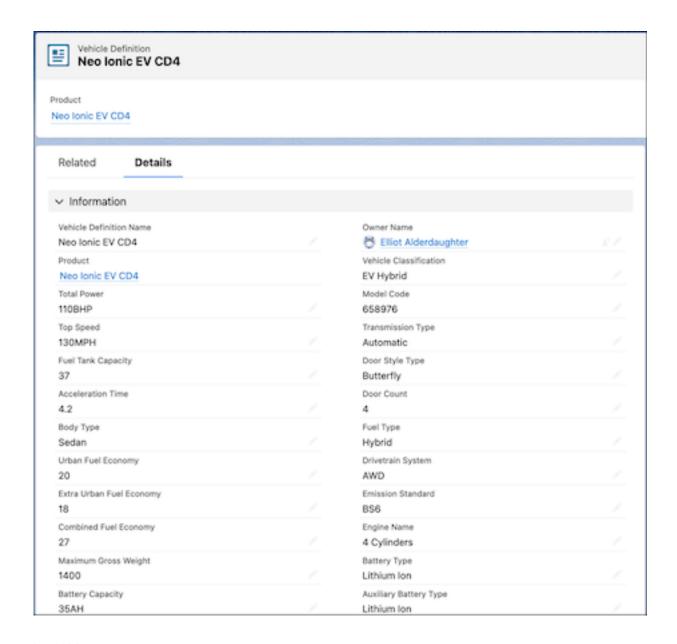
Track each vehicle in your product portfolio by creating Product records and then record information, such as the vehicle's model name, model year, make name, and trim type. Create Vehicle Definitions to record additional specifications about vehicle models, such as the vehicle's fuel economy details, engine details, dimensions, and speed details. Additionally, create Product records for parts and accessories, and record details, such as manufacturer part number, universal product code, and availability date.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

**Who:** This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, find and select **Products** or **Vehicle Definitions**, and then click **New**. Specify the details of the record.

Manage Automotive Assets

An asset is a physical item that you manufacture, sell, or install. An asset can be a vehicle, a part, such as the engine and the chassis, or a standalone accessory, such as the entertainment system or the navigation system. Create asset records to capture key details such as, price, quantity, purchase and installation dates. Associate related accounts, contacts, and products to asset records. You can also capture the hierarchy of assets to view parent and child assets. And by using asset relationships, you can track upgrades and replacements for an asset.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, find and select **Assets**, and then click **New**. Specify the details of the asset.

Get a Holistic View of a Vehicle

Use the Vehicle page to view all the information related to a vehicle in one page. Capture information about each vehicle that's manufactured, stocked, or sold. Record details, such as the vehicle identification number (VIN), odometer reading, market price, registration details, features, and service details. Get visibility into installed parts and accessories of a vehicle as well as compatible parts and accessories that you can recommend or upsell. Track warranties related to a vehicle and the vehicle's parts and accessories. View the hierarchy of assets related to a vehicle. View a vehicle and the vehicle parts' replacement, upgrade, or crossgrade assets.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, search and select **Vehicles**, and then click **New**. Specify details about the vehicle.

SEE ALSO:

Salesforce Help: Customize the Vehicle Page for Automotive(can be outdated or unavailable during release preview)

Know More About a Vehicle

Enhance your visibility into a vehicle's lifecycle with information about related stakeholders, important events, record changes, and more. Easily customize the Vehicle page with additional components to enrich your users' experience.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

Why: You can configure and add these components to the Vehicle page:

Events and Milestones

Use predefined and custom Asset Milestones to capture key milestones and events related to a vehicle, such as vehicle delivery, 5-year anniversary, ownership change, and critical recalls.

Timeline

Track activities related to a vehicle on an interactive, visual, and chronological timeline. A timeline can draw information from the Vehicle and Asset objects, objects related to Vehicle and Asset, and the parent objects of Vehicle.

Relationship Cards

View all the information that you need about stakeholders related to a vehicle on the Vehicle page itself, instead of going to different pages. Relationship cards can draw information from related objects up to three levels away and show the information in one place.

Actionable Relationship Center (ARC)

Get a deeper understanding of assets, products, accounts, contacts, and more related to a vehicle with an easy-to-navigate graph.

Record Alerts

Show actionable, timely alerts on information related to a vehicle, such as upcoming engine warranty expiration and pending car insurance renewal. You can integrate data from external sources and set up alerts on telematics, advanced driver assistance, service history, repair history, and more.
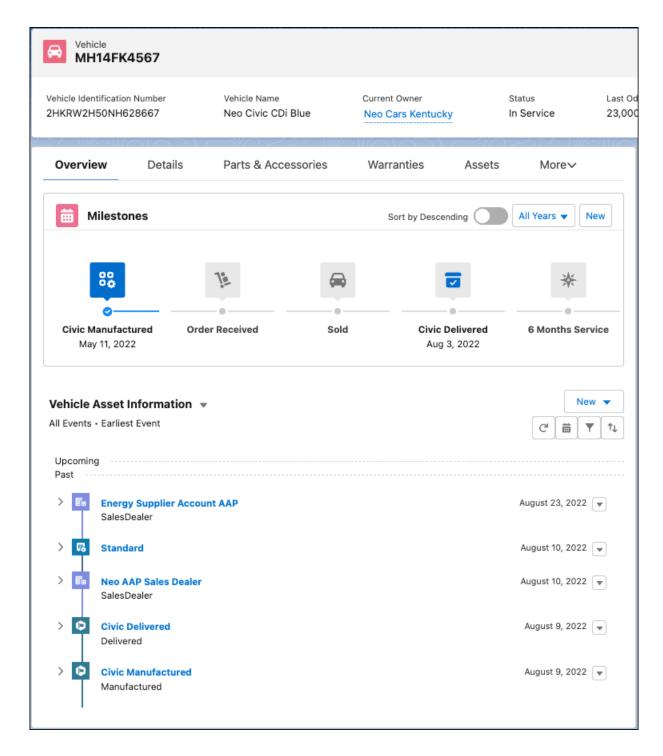
Interest Tags

Be mindful of a customer's interest and identify trends of common interests by adding Interest Tags to vehicle records.

Action Plans

Define a set of tasks to complete a business process by using Action Plans. For example, you can define action plans for scheduling maintenance or extending warranties, and relate the action plan to a specific vehicle.

How: To add the components to your Vehicle page, open a Vehicle record, then click **Edit Page** from Setup. Add the required components.

SEE ALSO:

Salesforce Help: Customize the Vehicle Page for Automotive(can be outdated or unavailable during release preview)

Track Products and Locations

Track products, product locations, and product movement with Automotive Cloud. Create Associated Location, Product Item, Product Item Transfer, and Product Request records to monitor your inventory.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

SEE ALSO:

Salesforce Help: Track Product Inventory and Transfers(can be outdated or unavailable during release preview)

Stakeholder Management

Capture and use information about stakeholders involved in the automotive lifecycle with flexibility and ease. Create business profiles to record granular details about automotive dealers, such as the operating name, reference number, service type, and region. Link physical assets, such as vehicles and accessories, with the accounts and contacts of related stakeholders by using Asset Account Participant and Asset Contact Participant records. Get visibility into the cumulative lifetime purchases of various types of groups, such as households and co-operatives, by using Party Relationship Groups.

IN THIS SECTION:

Develop a Detailed Business Profile of Your Partners

Capture comprehensive details about your partners, such as sales dealers, service dealers, vendors, and suppliers. Create Business Profile records for partner accounts and record details, such as registered name, service type, tax identifier, and partner code.

Link Each Asset to Multiple Stakeholders

Physical assets, such as vehicles, parts, and accessories can be related to multiple stakeholders during the asset lifecycle. Link assets with related accounts by creating Asset Account Participant records and with related contacts by creating Asset Contact Participants records. For example, relate a vehicle to the accounts of the vehicle's dealers and financiers. And relate the vehicle to the contacts of the vehicle's owner and driver.

Track Cumulative Purchase Details for Dealer and Customer Groups

Original equipment manufacturers and dealers can track the cumulative lifetime purchase of products and services of a group of related members. Create party relationship groups for related members, such as households, dealer groups, and supplier groups.

Get Greater Visibility Into Your Stakeholder Information

Manage your stakeholders effectively with enhanced visibility into affiliated groups, important events, related accounts, contacts, vehicles, and assets. Add components to the Account and Contact pages to make the information more readily available.

Develop a Detailed Business Profile of Your Partners
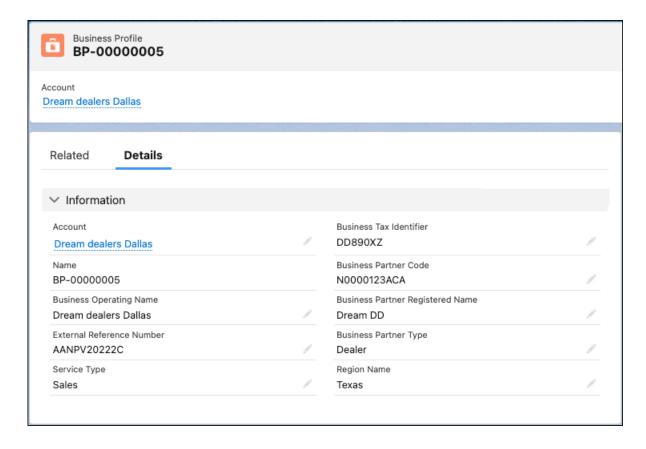
Capture comprehensive details about your partners, such as sales dealers, service dealers, vendors, and suppliers. Create Business Profile records for partner accounts and record details, such as registered name, service type, tax identifier, and partner code.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, find and select **Business Profiles**, and then click **New**. Select the Account record for which you want to create a business profile. Specify the details of the business profile.

SEE ALSO:

> Salesforce Help: Create Business Profiles(can be outdated or unavailable during release preview)
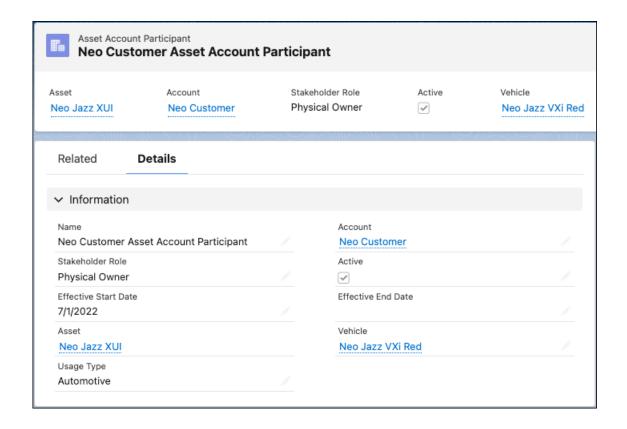
Link Each Asset to Multiple Stakeholders
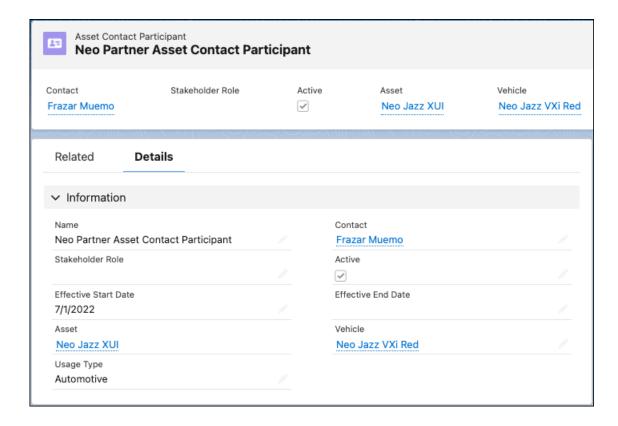
Physical assets, such as vehicles, parts, and accessories can be related to multiple stakeholders during the asset lifecycle. Link assets with related accounts by creating Asset Account Participant records and with related contacts by creating Asset Contact Participants records. For example, relate a vehicle to the accounts of the vehicle's dealers and financiers. And relate the vehicle to the contacts of the vehicle's owner and driver.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, find and select **Asset Account Participants** or **Asset Contact Participants**, and then click **New**. Specify the details of the record.

SEE ALSO:

Salesforce Help: Create Asset Account Participants(can be outdated or unavailable during release preview)

Salesforce Help: Create Asset Contact Participants(can be outdated or unavailable during release preview)
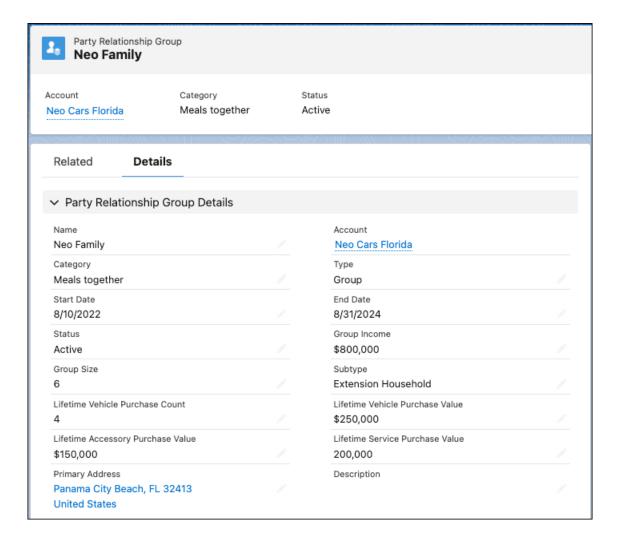
Track Cumulative Purchase Details for Dealer and Customer Groups

Original equipment manufacturers and dealers can track the cumulative lifetime purchase of products and services of a group of related members. Create party relationship groups for related members, such as households, dealer groups, and supplier groups.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

How: From the App Launcher, find and select **Party Relationship Groups** and click **New**. Specify the details of the party relationship group.

Get Greater Visibility Into Your Stakeholder Information

Manage your stakeholders effectively with enhanced visibility into affiliated groups, important events, related accounts, contacts, vehicles, and assets. Add components to the Account and Contact pages to make the information more readily available.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User permission set.

Why: You can configure and add these components to the Account and Contact pages:

Events and Milestones

Show key life events for contacts or person accounts, such as promotion, retirement, and relocation. Also, view business milestones for business accounts, such as new product launch, merger & acquisition, and bankruptcy.

Relationship Cards

Show comprehensive information about stakeholders on compact cards, instead of going to multiple pages. Relationship cards can draw information from related objects up to three levels away and show the information in one place.

Actionable Relationship Center (ARC)

View party relationship groups, business profiles, contacts, vehicles, assets, and more related to a stakeholder on an intuitive, interactive graph.

How: To customize the Account or Contact page layout, open an Account or Contact record, then click **Edit Page** from Setup. Add the relevant components.

SEE ALSO:

Salesforce Help: Configure Events and Milestones for Your Vehicles and Stakeholders(can be outdated or unavailable during release preview)

Salesforce Help: Configure Relationship Cards for Vehicles(can be outdated or unavailable during release preview)

Salesforce Help: Configure Actionable Relationship Center Graphs for Accounts and Vehicles(can be outdated or unavailable during release preview)

Customer Service Management

Customize every step of your service journey to make the experience more intelligent and connected for your dealers and customers. Customer service reps can use the Service Console for Automotive to holistically manage the customer service experience. The Service Excellence components help you deliver exceptional service interactions that increases customer satisfaction and customer lifetime value.

IN THIS SECTION:

Transform Your Customer Service Experience Using the Service Console for Automotive

Customer service representatives (CSRs) can use the Service Console for Automotive to get a comprehensive view of customers' activities in one page. The console is designed to help service agents proactively engage with customers, and resolve customer queries to boost customer loyalty and satisfaction. CSRs can also track previous interactions on a timeline and check related Vehicle, Order, and Case records. CSRs can search for relevant knowledge articles, get alerts for related records that need attention, and run actions to resolve customer requests.

Orchestrate the Automotive Service Journey with Service Excellence Components

Boost the productivity of your customer service representatives (CSRs) and deliver proactive, useful service interactions by using a suite of powerful Service Excellence components for Automotive. Verify the identity of your customers or the customers' authorized representatives and protect their personal information with Identity Verification. Prevent privacy breaches by inspecting customer identity verification records with Audit Trail. Track a customer's activities on a visual, interactive, and chronological timeline. Receive actionable alerts on changes related to your customers with Record Alerts. Run relevant actions to resolve queries with Action Launcher.

Transform Your Customer Service Experience Using the Service Console for Automotive

Customer service representatives (CSRs) can use the Service Console for Automotive to get a comprehensive view of customers' activities in one page. The console is designed to help service agents proactively engage with customers, and resolve customer queries to boost customer loyalty and satisfaction. CSRs can also track previous interactions on a timeline and check related Vehicle, Order, and Case records. CSRs can search for relevant knowledge articles, get alerts for related records that need attention, and run actions to resolve customer requests.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Service Cloud for Automotive are enabled.

Who: This feature is available only to users who have the Automotive Foundation User and the Industry Service Excellence permission sets.
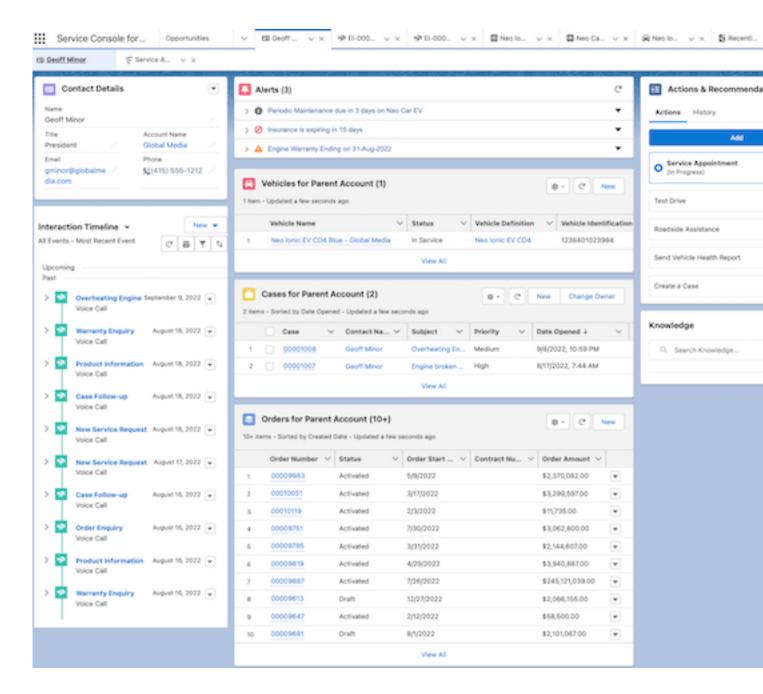
Why: The Service Console for Automotive brings together the powerful Service Excellence components and platform capabilities to a unified console.

The console comes with the following preconfigured components:

- Identity Verification flow
- Timeline component that shows Engagement Interaction records
- Snapshots of related Vehicle, Order, and Case records
- Record Alerts component
- Actions & Recommendations component
- Knowledge component

You can configure the components to individually work with other standard navigation apps too.

How: From the App Launcher, find and select **Service Console for Automotive**.

SEE ALSO:

Salesforce Help: Get to Know the Service Console for Automotive(can be outdated or unavailable during release preview)

Orchestrate the Automotive Service Journey with Service Excellence Components

Boost the productivity of your customer service representatives (CSRs) and deliver proactive, useful service interactions by using a suite of powerful Service Excellence components for Automotive. Verify the identity of your customers or the customers' authorized representatives and protect their personal information with Identity Verification. Prevent privacy breaches by inspecting customer identity verification records with Audit Trail. Track a customer's activities on a visual, interactive, and chronological timeline. Receive actionable alerts on changes related to your customers with Record Alerts. Run relevant actions to resolve queries with Action Launcher.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User and the Industry Service Excellence permission sets.

Why: Help your CSRs deliver exceptional service by configuring Service Excellence components. These components are available with the Service Console for Automotive. The components can also be configured to work in standard navigation apps.

How:

To configure Identity Verification, go to Flows in Setup. Create an Identity Verification flow or customize a preconfigured flow.

To use Audit Trail, from the App Launcher, go to Audit Trail. Specify the criteria to generate customer Identity Verification records, and then generate the records.

To configure Timeline, go to Timeline in Setup. Click **New Timeline**, and then specify the details of the timeline.

To configure Record Alerts, go to Record Alerts in Setup. Follow the setup flow to set up access to Record Alerts. Configure data sources and categories for the alerts. Add the Record Alerts component to the relevant pages.

To configure Action Launcher, go to Action Launcher in Setup. Create an Action Launcher Deployment that includes the settings for the Action Launcher component.

SEE ALSO:

Salesforce Help: Work with Automotive Service Excellence Components(can be outdated or unavailable during release preview)

Dealer Performance Management

Original equipment manufacturers (OEMs) and dealers can use Automotive Cloud to collaborate better and achieve common goals. Dealers can create retail delivery reports (RDRs) to report sales of vehicles to OEMs. Dealers can also submit proof-of-sales for parts and accessories. OEMs can use the information for rebate calculations and analytics. OEMs and dealers can use sales agreements, forecasts, targets, and program-based business for greater accuracy, predictability, and alignment. OEMs can plan effective visits to dealers and ensure dealer compliance, analyze dealer performance, and upsell products. OEMs and dealers can also use CRM Analytics dashboards to show actionable insights on dealer performance, sales lifecycle, revenue trends, and more.

IN THIS SECTION:

Report Sales of Vehicles and Parts

Dealers can create retail delivery reports (RDRs) for vehicle sales and proof-of-sales for part and accessory sales to collaborate better with original equipment manufacturers (OEMs). After approving the RDRs, OEMs can use these records to meet advanced business needs, such as rebate calculations and analysis of dealer performance. Dealers can create Rebate Claim records for sold vehicles and Transaction Journal records for sold parts and accessories.

Optimize Sales and Operations for Automotive

Get greater visibility into your business transactions by using sales agreements and distribute measurable targets across your team hierarchy. Get insights on your operations and sales with holistic, accurate forecasts and plan for new product and component requirements with program-based business.

Plan and Execute Effective Dealer Visits

Plan timely, productive dealer visits to cultivate deeper relationships with dealers. Use visits to analyze dealer performance, ensure dealer compliance, and upsell new vehicle accessories. Sales managers can plan visits by specifying visit details, assigning field reps, and adding the tasks to complete during the visits. District managers or evaluation officers on the ground can view a list of all visits, go to a dealer's location, complete tasks, and capture key performance indicators.

Accelerate Your Business by Using Analytics for Automotive

Empower your sales team with the new CRM Analytics app exclusively created for the dealership-based automotive industry. The Analytics for Automotive app provides a comprehensive set of dashboards for dealers and original equipment manufacturers. The dashboards can analyze dealer performance, sales lifecycle, revenue trends, inventory, dealer-sales agreements, team targets, and more.

Report Sales of Vehicles and Parts
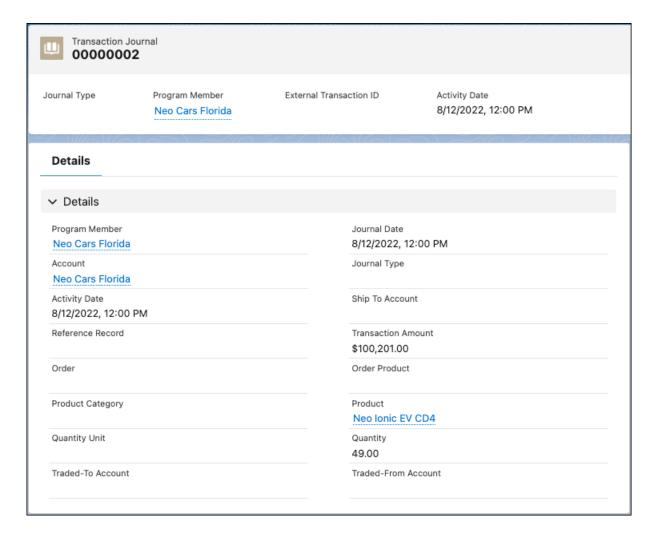
Dealers can create retail delivery reports (RDRs) for vehicle sales and proof-of-sales for part and accessory sales to collaborate better with original equipment manufacturers (OEMs). After approving the RDRs, OEMs can use these records to meet advanced business needs, such as rebate calculations and analysis of dealer performance. Dealers can create Rebate Claim records for sold vehicles and Transaction Journal records for sold parts and accessories.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Automotive Foundation User and Partner Performance Management permission sets.

How: From the App Launcher, find and select **Rebate Claims** or **Transaction Journals**, and then click **New**. Specify the details of the record.

Salesforce Help: Manage Dealer Sales Reports and Claims(can be outdated or unavailable during release preview)

Optimize Sales and Operations for Automotive

Get greater visibility into your business transactions by using sales agreements and distribute measurable targets across your team hierarchy. Get insights on your operations and sales with holistic, accurate forecasts and plan for new product and component requirements with program-based business.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud is enabled.

Who: Sales Agreements is available only to users who have the Manufacturing Sales Agreements permission set. Advanced Account Forecasting is available only to users who have the Manufacturing Advanced Account Forecast permission set. Account Manager Targets is available only to users who have the Manufacturing Account Manager Targets permission set. Program Based Business is available only to users who have the Manufacturing Program Based Business permission set.
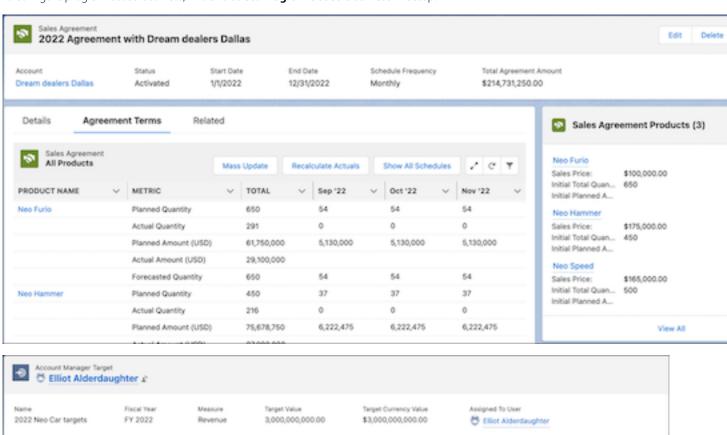
How:
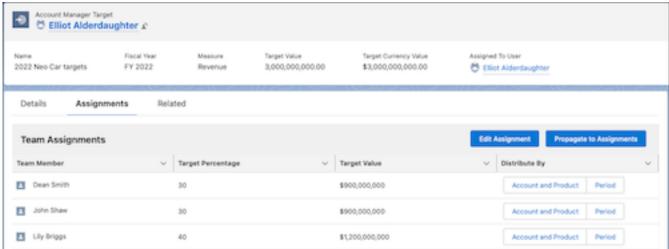
To configure sales agreements, find and select **Sales Agreements** in Setup.
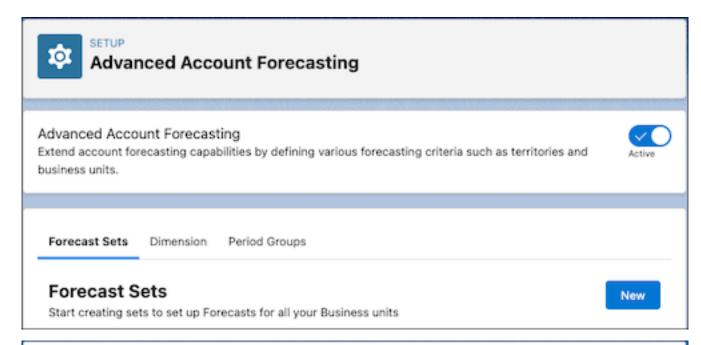
To configure advanced account forecasting, find and select **Advanced Account Forecasting** in Setup.
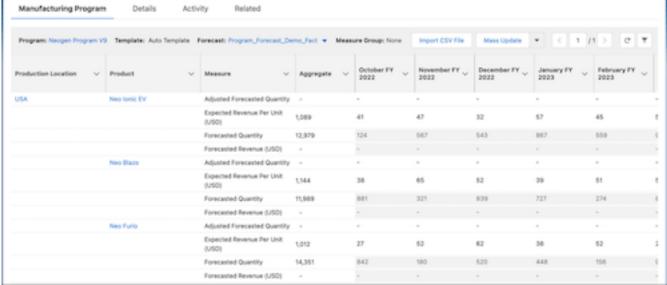
To configure account manager targets, find and select **Account Manager Targets** in Setup.

To configure program based business, find and select **Program Based Business** in Setup.

SEE ALSO:

Salesforce Help: Strengthen Dealer Relationships with Improved Sales and Operations(can be outdated or unavailable during release preview)

Plan and Execute Effective Dealer Visits

Plan timely, productive dealer visits to cultivate deeper relationships with dealers. Use visits to analyze dealer performance, ensure dealer compliance, and upsell new vehicle accessories. Sales managers can plan visits by specifying visit details, assigning field reps, and adding the tasks to complete during the visits. District managers or evaluation officers on the ground can view a list of all visits, go to a dealer's location, complete tasks, and capture key performance indicators.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Partner Visit Management are enabled.

Who: This feature is available only to users who have the Partner Visit Management and Action Plans permission sets.

How: To plan and perform visits, from the App Launcher, find and select **Partner Visits**.

SEE ALSO:

[Salesforce Help: Evaluate Dealer Performance with Visits and Assessments](can be outdated or unavailable during release preview)

Accelerate Your Business by Using Analytics for Automotive

Empower your sales team with the new CRM Analytics app exclusively created for the dealership-based automotive industry. The Analytics for Automotive app provides a comprehensive set of dashboards for dealers and original equipment manufacturers. The dashboards can analyze dealer performance, sales lifecycle, revenue trends, inventory, dealer-sales agreements, team targets, and more.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited editions where Automotive Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Analytics Plus and Automotive Foundation User permission sets.

Why: Get time series projections to analyze dealer performance. Assess seller efficiency by identifying top sellers based on vehicle model, region, and revenue. Interpret customer behavior by viewing the position of each lead and opportunity in the pipeline, analyzing the conversion ratio, and determining the dropout reasons by source.

How: Go to CRM Analytics Studio, and then create your app by using the Analytics for Automotive template.

SEE ALSO:

[Salesforce Help: Use Analytics for Automotive Dashboards](can be outdated or unavailable during release preview)

New Metadata Types for Automotive Cloud

Make the most of the new metadata types of Automotive Cloud.

Manage the end-to-end lifecycle of vehicles, related stakeholders, and parts and accessories
Use the new `enableAutomotiveCloud` field on the IndustriesAutomotiveSettings metadata type.

Deliver excellent service to your partners in the automotive ecosystem
Use the new `enableAutomotiveServiceExcellence` field on the IndustriesAutomotiveSettings metadata type.

Manage the end-to-end lead lifecycle right from lead generation to conversion into opportunities
Use the new `enablePartnerLeadManagement` field on the IndustriesManufacturingSettings metadata type.

Assess dealer and distributor performance
Use the new `enablePartnerPerformanceManagement` field on the IndustriesManufacturingSettings metadata type.

Manage visits and its associated task flows
Use the new `enablePartnerVisitManagement` field on the IndustriesManufacturingSettings metadata type.

New and Changed Objects for Automotive Cloud

Do more with the new and changed objects in Automotive Cloud.

New Objects

Here are the new objects in Automotive Cloud.

Associate an account with an asset
Use the new `AssetAccountParticipant` object.

Associate a contact with an asset
Use the new `AssetContactParticipant` object.

Store the key events in an asset's lifecycle
Use the new `AssetMilestone` object.

Associate a lead with a product
Use the new `LeadLineItem` object.

Associate a lead with a dealer or source account
Use the new `LeadPreferredSeller` object.

Associate an opportunity with a dealer or source account
Use the new `OpportunityPreferredSeller` object.

Store the details about a vehicle
Use the new `Vehicle` object.

Store the details about a vehicle model
Use the new `VehicleDefinition` object.

Changed Objects

Here are the changed objects in Automotive Cloud.

Store additional details about a business partner account
Use the new `Business Partner Type`, `External Reference Number`, `Business Partner Registered Name`, `Service Type`, `Business Partner Code`, and `Region Name` fields on the BusinessProfile object.

Record the time during which a lead is interested in a transaction
Use the new `EarliestInterestDate` and `LatestInterestDate` fields on the Lead object.

Associate a vehicle with an asset
Use the new `Vehicle` field on the Asset object.

Create proof-of-sales for parts and accessories

Use the new `TradedToAccount` and `TradedFromAccount` fields on the TransactionJournal object.

Report sales of vehicles

Use the new `VehicleDlvrOdometerReading`, `Vehicle`, `VehicleDeliveryStatus`, `AssetSaleType`, `Asset`, `AssetIdentificationNumber`, `TradedToAccount`, `TradedFromAccount`, and `SaleApprovalDate` fields on the RebateClaim object.

Store details about a vehicle, part, or accessory

Use the new `HarmonizedSystemCode`, `HarmonizedTariffScheduleCode`, `ManufacturerName`, `ManufacturerPartNumber`, `ProductLineCode`, `ProductCategoryCode`, `UniversalProductCode`, `AvailabilityDate`, `DiscontinuedDate`, `IsEnvrPrtcRegCompliant`, and `IsCertified` fields on the Product object.

Track the cumulative lifetime sales for a group of members

Use the new `LifetimeVehPurchaseCount`, `LifetimeVehPurchaseValue`, `LifetimeAcsryPurchaseValue`, and `LifetimeSvcPurchaseCount` fields on the PartyRelationshipGroup object.

Associate an account with an internal organization unit

Use the new `account` field on the InternalOrganizationUnit object.

Indicate whether an initiating attendee is authenticated

Use the new `IsAuthenticated` field on the EngagementAttendee object.

Indicate whether an initiating attendee is verified

Use the new `IsVerified` field on the EngagementAttendee object.

Indicate the role of an attendee

Use the new `Role` field on the EngagementAttendee object.

Specify the time an engagement attendee is verified for an engagement interaction

Use the new `VerificationTime` field on the EngagementAttendee object.

Auto-calculate the duration of an engagement interaction by updating the end time

Use the new `Duration` field on the EngagementInteraction object. The field is now read-only.

Store the reason for an engagement interaction

Use the new `Reason` field on the EngagementInteraction object.

Summarize an engagement interaction

Use the new `InteractionSummary` field on the EngagementTopic object.

Configure reasons for the failure of an identity verification process

Use the new `ProcessFailureReason` field on the EngagementTopic object.

Configure the status values of a process run during an engagement interaction

Use the new `ProcessStatus` field on the EngagementTopic object.

Specify either the external or the internal attendee of an engagement interaction

Use the updated `ExternalAttendeeId` or `InternalAttendeeId` field on the EngagementAttendee object. You must specify the value of at least one of these fields.

Connect an engagement attendee to either an engagement interaction or a voice call

Use the updated `EngagementId` field on the EngagementAttendee object. The field is now required.

Configure more channels of communication between a customer and a customer service representative

Use the updated `AttendeeVerificationTime` field on the EngagementInteraction object. The field is now required.

Configure custom channels of communication between a customer and a customer service representative

Use the updated `CommunicationChannel` field on the EngagementInteraction object. The field is now required.

Configure custom values to indicate how an initiating attendee feels about an engagement interaction

Use the updated `Sentiment` field on the EngagementInteraction object.

Configure custom values to indicate the status of an engagement interaction

Use the updated `Status` field on the EngagementInteraction object.

Configure custom values to indicate the type of an engagement interaction

Use the updated `Type` field on the EngagementInteraction object.

Connect an engagement topic to either an engagement interaction or a voice call

Use the updated `EngagementId` field on the EngagementTopic object. The field is now required.

Consumer Goods Cloud

Integrate your digital operations quickly using MuleSoft Accelerator for Consumer Goods. And with the Analytics for Consumer Goods - Advanced Data Model app, get insights on territory, account, and sales rep performance.

IN THIS SECTION:

Integrate Your Digital Operations Quickly with MuleSoft Accelerator

Use pre-built APIs, integration templates, and connectors to integrate your external systems with the Consumer Goods cloud. Seamlessly consolidate relevant product, product hierarchy, customer, and customer hierarchy master data for informed promotion planning and retail execution.

Improve Business by Using Analytics for Consumer Goods - Advanced Data Model

Get insights on territory, account, and sales rep performance with the new Analytics for Consumer Goods - Advanced Data Model app. Sales managers can use the app to improve account compliance, identify accounts at risk, and maximize sales rep effectiveness. Sales reps get account-level insights on visit performance, sales, compliance, and top-selling products.

Integrate Your Digital Operations Quickly with MuleSoft Accelerator

Use pre-built APIs, integration templates, and connectors to integrate your external systems with the Consumer Goods cloud. Seamlessly consolidate relevant product, product hierarchy, customer, and customer hierarchy master data for informed promotion planning and retail execution.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

MuleSoft Accelerator for Consumer Goods

Improve Business by Using Analytics for Consumer Goods - Advanced Data Model

Get insights on territory, account, and sales rep performance with the new Analytics for Consumer Goods - Advanced Data Model app. Sales managers can use the app to improve account compliance, identify accounts at risk, and maximize sales rep effectiveness. Sales reps get account-level insights on visit performance, sales, compliance, and top-selling products.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Analytics for Consumer Goods - Advanced Data Model is available only to Consumer Goods Cloud users. To create an app from the Analytics for Consumer Goods - Advanced Data Model template, you must also have the Consumer Goods Cloud Intelligence add-on license.

How: Go to Analytics Studio, and then create your app by using the **Analytics for Consumer Goods - Advanced Data Model** template.

Financial Services Cloud

The Actionable Relationship Center shows more information with fewer clicks and is easier to set up with new templates. Streamline the Group Builder Edit window to show only the sections and fields that your users need. Maximize review and minimize customer churn with the new CRM Analytics templates for Retail Banking and Wealth Management.

IN THIS SECTION:

Actionable Relationship Center (ARC)

Show even more relevant customer relationship data to your users with enhancements to the Actionable Relationship Center. Save time building graphs with ARC graph templates, customize graphs to deepen relationships with Einstein Relationship Insights, and more.

Interest Tags

Quickly search for interest tags and tag categories using the browse interest tags window.

Householding

You can now streamline the Group Builder Edit window and only include the sections and fields that are relevant to your team.

Verify Caller Identity for Financial Services Cloud

Verify the identity of a caller before you share any sensitive information with them. Keep your customers' trust and protect their personal information related to your financial services institution. Set up flows that bankers and advisors can use to verify customers or their authorized representatives. You can even verify a caller's identity using external data.

Enhanced Timeline for Financial Services Cloud

Enable bankers to view all past interactions with a customer chronologically. Within each interaction, bankers can see more information and related details.

Financial Services Cloud Community Licenses

Make updates to Financial Services Cloud permission set licenses.

FlexCard-Based Policy 360 Component

Adopt the new FlexCard-based Policy 360 component for an improved end user experience and simplified configuration.

Wealth Management and Retail Banking

Minimize customer churn by using the new CRM Analytics templates for Wealth Management and Retail Banking. Maximize your revenue by using the other new CRM Analytics templates for Wealth Management. With these templates, you can get predictions about customers who are likely to churn, customers who are likely to add more assets, and recommended products that you can pitch to customers.

Tear Sheet Generation

You users can now generate a document with information from one or more objects and attach it to a record page.

Streamline the Know Your Customer Process For Your Users

Your users can now easily perform identity verification, risk assessment, and screening checks of parties. By using the new Know Your Customer (KYC) data model, your users can use data from external sources to verify documents submitted during an assessment, know more about a prospect, or categorize parties based on their risk assessment. Parties here can be accounts, contacts, or leads.

Create a Financial Services Cloud Pre-Release Trial Org

Sign up for a Financial Services Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Get Started Faster with Guided Setups

Discover the new guided setups for Financial Services Cloud.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Get Started with FSC Insurance Analytics Fast Start

Create an app from the FSC Insurance Analytics Fast Start template and give the Financial Services Cloud customers a quick way to apply the power of CRM Analytics to the data in their Book of Business. Use the FSC Insurance Analytics Fast Start dashboards to analyze the Book of Business and identify cross-sell opportunities in the existing customer base.

Improve Business and Customer Relationship with Analytics for Retail Banking

Manage your branch and customers better by using the new dashboards in Analytics for Retail Banking. The Branch Unit Related Records Analysis dashboard provides insights into the Branch Unit Related Records and identifies the branches and bankers with the maximum number of leads and opportunities. Use these insights to identify the areas that need attention and devise strategies to improve branch performance. The Interest Tags dashboard focuses more on your customers' areas of interest and identifies the top-rated interest tags for each customer segment and category. Use these insights to devise strategies and personalize customer interactions and offers to enhance customer experience and build a deep customer relationship.

Referral Scoring for Financial Services Cloud is Being Retired

Referral Scoring for Financial Services Cloud is being retired on October 03, 2022. After Referral Scoring is retired, you can't set up referral scoring models or view referral scoring cards. The Referrals Lightning component is also being removed from the home page. We recommend you to migrate to Einstein Prediction Builder and rebuild your Referral Scoring models.

Life Events or Business Milestones Has a New Name

We've renamed the Life Events or Business Milestones component and the Life Events and Business Milestones Setup page to Events and Milestones. We didn't make changes to this component's functionality—you can still use it to show life events for contacts or person accounts, and business milestones for accounts.

Actionable Relationship Center (ARC)

Show even more relevant customer relationship data to your users with enhancements to the Actionable Relationship Center. Save time building graphs with ARC graph templates, customize graphs to deepen relationships with Einstein Relationship Insights, and more.

IN THIS SECTION:

Create ARC Relationship Graphs Quickly Using Templates

Save time when creating relationship graphs in the Actionable Relationship Center by using templates. Two templates give you a head start on building graphs by providing you with pre-configured nodes that show relationships for your Business to Customer and Business to Business clients.

View Einstein Relationship Insights for Accounts and Contacts on an ARC Graph

Build stronger customer relationships with deeper relationship insights from the new ARC Einstein Relationship Insights component. From an ARC Relationship Graph, show web recommendations for account or contact records. View the recommendations as smart tags or a graph.

Show All Child Records for an Object in an ARC Graph

Users can view important relationship data in a single, unified view by showing child records in the same node as the parent node on an ARC Relationship Graph. Previously, users had to click on each card on a graph to view child records.

Show even more information at a glance in an ARC Relationship Graph. If two objects have a one-to-one lookup relationship with each other, you can now show fields from both objects on a single node.

Create ARC Relationship Graphs Quickly Using Templates
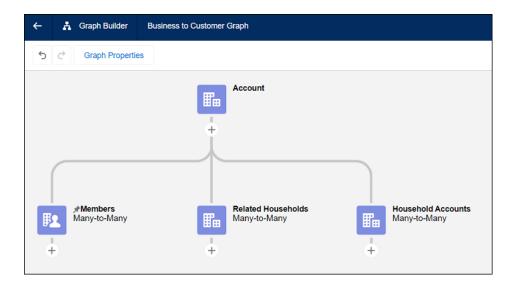
Save time when creating relationship graphs in the Actionable Relationship Center by using templates. Two templates give you a head start on building graphs by providing you with pre-configured nodes that show relationships for your Business to Customer and Business to Business clients.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.
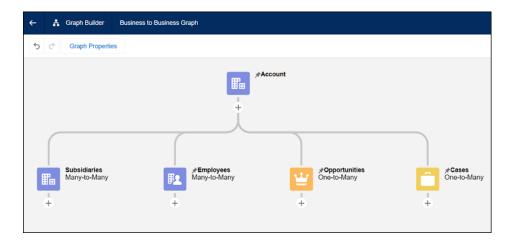
Who: Users need the Financial Services Cloud Extension permission set to use this feature.

How: In Setup, create a new Actionable Relationship Center relationship graph. Select **Default Templates** and select **B2C Graph**.

Or select **B2B Graph**.

View Einstein Relationship Insights for Accounts and Contacts on an ARC Graph

Build stronger customer relationships with deeper relationship insights from the new ARC Einstein Relationship Insights component. From an ARC Relationship Graph, show web recommendations for account or contact records. View the recommendations as smart tags or a graph.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: The Financial Services Cloud Package must be enabled in your Salesforce org. Users need the Financial Services Cloud Extension permission set and Einstein Relationship Insights Growth or Einstein Relationship Insights Starter to view the ARC Einstein Relations Insights component.

Why: On an ARC Relationship Graph, click an account record to see the record relationship insights. In the chart view, the colorful recommendations are records in your Salesforce org and the gray recommendations are new. Click a recommendation to take actions such as linking the recommendation to the record or creating a record.

How: In Lightning App Builder, add the ARC Einstein Relationship Insights component to the same record pages where you added the ARC Relationship Graph component.

SEE ALSO:

Salesforce Help: Einstein Relationship Insights on an ARC Graph (can be outdated or unavailable during release preview)

Salesforce Help: Install the Managed Package (can be outdated or unavailable during release preview)

Person Accounts

Create and Configure Lightning Experience Record Pages
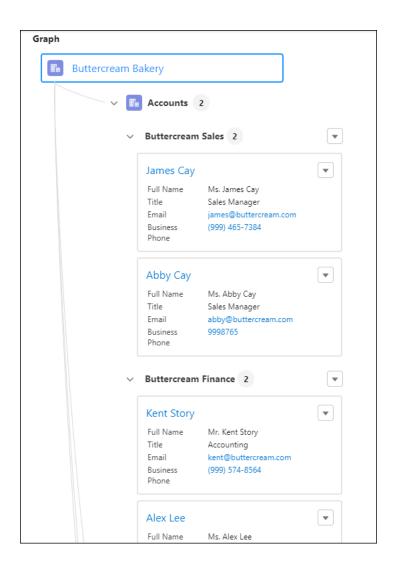
Show All Child Records for an Object in an ARC Graph

Users can view important relationship data in a single, unified view by showing child records in the same node as the parent node on an ARC Relationship Graph. Previously, users had to click on each card on a graph to view child records.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.
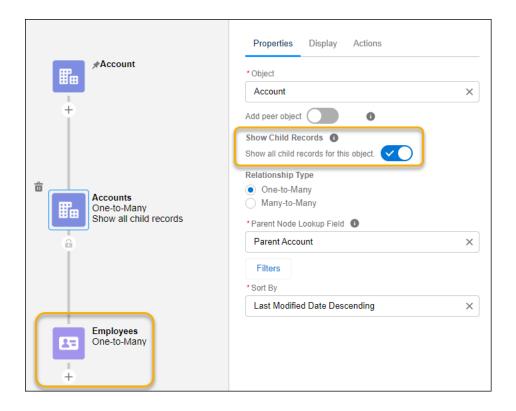
Who: Users need the Financial Services Cloud Extension permission set to use this feature.

Why: Showing child records saves users time. For example, if you want to show all employees for accounts, on the account node, turn on **Show all child records for this object**, and then add a contact node as the child of account. When you view the ARC Relationship Graph, all contacts are shown in the graph, and you don't have to click to expand each contact to view employees.

How: In Setup, on an ARC Relationship Graph, turn on **Show Child Records** for a node. Then add and configure one child node.

SEE ALSO:

Salesforce Help: Configure Show Child Records on an ARC Relationship Graph (can be outdated or unavailable during release preview)

Show Peer Object Fields on an ARC Graph
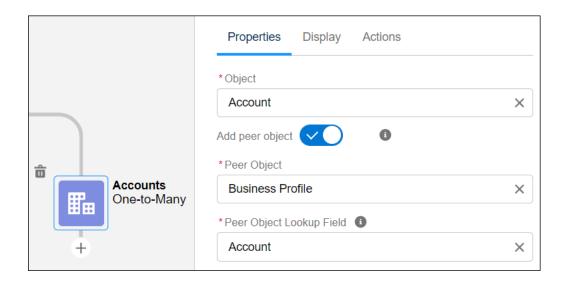
Show even more information at a glance in an ARC Relationship Graph. If two objects have a one-to-one lookup relationship with each other, you can now show fields from both objects on a single node.

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: There is a hard limit on the total number of custom fields allowed per object. If you have objects that have more than the maximum number of fields that an object can hold, and use peer objects with a one-to-one lookup relationship to hold those fields, you can now show those fields in a single record card on an ARC Relationship Graph.

How: In the ARC Relationship Graph Builder, select **Add Peer Object**. Select an object with a one-to-one lookup relationship to the node object, and a field from the peer object that points to the node object. On the Display tab and the Actions tab, select fields and record actions from both the node object and the peer object to show on the record card.

Interest Tags

Quickly search for interest tags and tag categories using the browse interest tags window.

IN THIS SECTION:

Browse for Interest Tags and Tag Categories

You can now search for interest tags by tag name and tag category name in the new Browse for Interest Tags window. Select and
add multiple tags at the same time to your record.

Browse for Interest Tags and Tag Categories
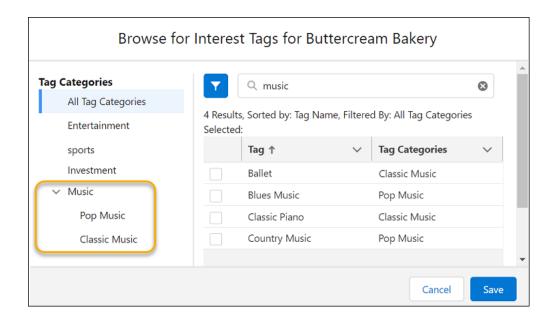
You can now search for interest tags by tag name and tag category name in the new Browse for Interest Tags window. Select and add
multiple tags at the same time to your record.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud
is enabled.

Who: To use browse for Interest Tags and Tag Categories, users need the Financial Services Cloud Extension permission set .

Why: The new browse window lets you view your tag category hierarchies. For example, search for music to show music tag category
and pop music and classic music as tag categories nested below music in the hierarchy. Clear the search and click **All Tag Categories**
to see all tag categories and interest tags in each category.

Householding

You can now streamline the Group Builder Edit window and only include the sections and fields that are relevant to your team.

IN THIS SECTION:

Configure the Group Builder Edit Window

Show your users the household and group data that's most relevant to them by configuring the Group Builder Edit window. Show or hide sections in the window to let your users manage important customer relationships in a household or group. Create field sets to show standard and custom fields that are the most relevant to your users. Previously, the group edit window wasn't customizable.

Disable Automatic Related Role Field Updates on Account Account Relationship Records

Use the new Update Related Role on associated record setting to disable automatic updates to the related role field on the inverse account-account relationship record.

Show the Group Builder Edit Window on an ARC Graph

You can now add the Group Builder Edit window as an Account record action on an ARC relationship graph. The Group Builder Edit window lets your users visualize and manage important customer relationships in a household or group.

Configure the Group Builder Edit Window

Show your users the household and group data that's most relevant to them by configuring the Group Builder Edit window. Show or hide sections in the window to let your users manage important customer relationships in a household or group. Create field sets to show standard and custom fields that are the most relevant to your users. Previously, the group edit window wasn't customizable.

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: Only show sections and fields that are most relevant to your users so that they can quickly find key information to manage customer relationships.

How: In Setup, show or hide a section using the Feature Flag Setting for the section. Also in Setup, click **Object Manager**, customize the fields to show in each section by creating and updating the field sets.

SEE ALSO:

Salesforce Help: Configure the Group Builder Edit Window (can be outdated or unavailable during release preview)

Work with Groups (Householding) in Financial Services Cloud

Disable Automatic Related Role Field Updates on Account Account Relationship Records

Use the new Update Related Role on associated record setting to disable automatic updates to the related role field on the inverse account-account relationship record.

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 you update an account account relationship record, the related role field on the inverse account account relationship record is automatically updated. If you use custom logic to update the related role on the inverse account account relationship record, disable the Update Related Role on associated records setting.

How: In Setup, click **Custom Settings**. Click **Manage** for Wealth Application Config to find the setting. This feature is turned on by default in the Winter '23 release.

Show the Group Builder Edit Window on an ARC Graph
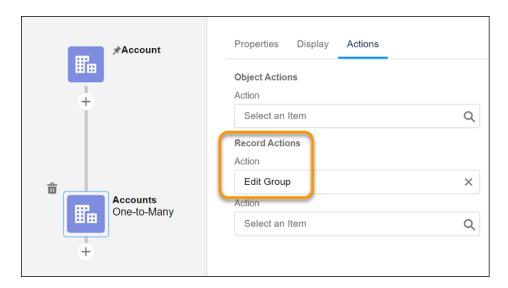
You can now add the Group Builder Edit window as an Account record action on an ARC relationship graph. The Group Builder Edit window lets your users visualize and manage important customer relationships in a household or group.

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 show the Group Builder Edit window on an ARC Relationship Graph, the Account record type must be Group. For example, Household is a Group record type. Use the Group Record Type Mapper to set Accounts to record type Group.

How: In Setup, on an ARC Relationship Graph, create an Account node or select an existing Account node. On the Actions tab, add the Edit Group record action.

SEE ALSO:

    Salesforce Help: Create a Custom ARC Relationship Graph (can be outdated or unavailable during release preview)

Verify Caller Identity for Financial Services Cloud

Verify the identity of a caller before you share any sensitive information with them. Keep your customers' trust and protect their personal information related to your financial services institution. Set up flows that bankers and advisors can use to verify customers or their authorized representatives. You can even verify a caller's identity using external data.

IN THIS SECTION:

Verify Your Financial Caller's Identity
The verification flow template guides bankers and advisors through the process of verifying a caller'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 Both an Authorized Representative and a Customer

Even if a representative is authorized to inquire about customer information, the banker verifies the identities of both the representative and the customer. Use the Verify Customer Identity flow to verify the representative and the Verify Linked Caller Identity flow to verify 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 by Using Custom Flow Screen Components

To create an identity verification flow, you have three 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, that's outside of Salesforce? No problem. You can now set up verification to search an external data source for caller records and verification data.

Translate Custom Field Labels for Global Users

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 bankers always see those labels in their preferred language.

Get Caller Identity Verification Up and Running with Ease

Set up caller verification with a new guided setup. All setup steps are listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

SEE ALSO:

Salesforce Help: Verify Caller Identity (can be outdated or unavailable during release preview)

Verify Your Financial Caller's Identity

The verification flow template guides bankers and advisors through the process of verifying a caller'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 Financial Services Cloud is enabled.

Who: This flow template is available to users with the Financial Services Cloud Extension permission set or the Financial Services Cloud Foundations permission set.

How: In Flow Builder, create a new flow by using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Finally, make the flow available to agents by adding the flow to the Engagement Interaction Lightning record page in Lightning App Builder.

Verify Both an Authorized Representative and a Customer

Even if a representative is authorized to inquire about customer information, the banker verifies the identities of both the representative and the customer. Use the Verify Customer Identity flow to verify the representative and the Verify Linked Caller Identity flow to verify 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 Financial Services Cloud is enabled.

Who: This flow template is available to users with the Financial Services Cloud Extension permission set or the Financial Services Cloud Foundations permission set.

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 by using the Linked Identity Verification Process Detail field in the process detail record for primary verification. Next, in Flow Builder, create a flow by using the Verify Customer Identity flow template. Next, create an Engagement Interaction Lightning record page. Then, make the flow available to bankers by adding the flow to the Engagement Interaction Lightning record page in Lightning App Builder.

Extend Your Identity Verification Flows by Using Custom Flow Screen Components

To create an identity verification flow, you have three 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 Financial Services Cloud is enabled.
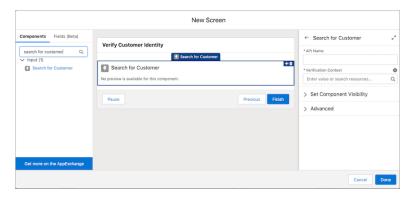
Who: These flow screen components are available to users who are assigned the Financial Services Cloud Extension permission set or the Financial Services Cloud Foundations permission set.

Why: Create screen flows that show data in a way that makes it easier for your users to search for callers and verify their identity.
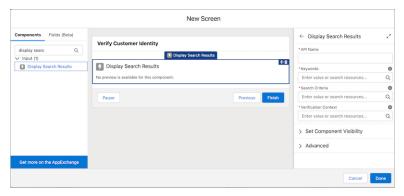
- The Search for Customer flow screen component is used to search for callers and customers in Salesforce. This component is available for both primary and secondary verification.

- The Display Search Results flow screen component is used to show 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 show 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 the custom flow that you're creating or customizing. Select **Search for Customer**, **Display Search Results**, or **Display Verification Results** in the New Screen window, and then enter the screen properties.

Search for Customer
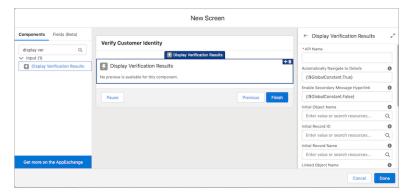
Display Search Results

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, that's outside of Salesforce? No problem. You can now set up 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 Financial Services Cloud is enabled.

Who: This feature is available to users with the Financial Services Cloud Extension permission set or the Financial Services Cloud Foundations permission set.

Translate Custom Field Labels for Global Users

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 bankers always see those labels in their preferred language.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services 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, use Translate and select **Identity Verification Process Custom Field Label** as the setup component.

Get Caller Identity Verification Up and Running with Ease

Set up caller verification with a new guided setup. All setup steps are 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 Financial Services Cloud is enabled.

Who: This feature is available to users with the Financial Services Cloud Extension permission set or the Financial Services Cloud Foundations permission set.

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

Enhanced Timeline for Financial Services Cloud

Enable bankers to view all past interactions with a customer chronologically. Within each interaction, bankers can see more information and related details.

IN THIS SECTION:

View Customer Information Chronologically with Enhanced Timeline
Now bankers can see the key activities relating to a customer all in one place. Bankers can see up to 2,000 records in one timeline.

View Customer Information Chronologically with Enhanced Timeline

Now bankers can see the key activities relating to a customer all in one place. Bankers can see up to 2,000 records in one timeline.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: This feature is available to users with the Financial Services Cloud Extension permission set OR Financial Services Cloud Foundations permission set.

How: In Setup, turn on **Timeline**. Create a timeline using a standard or custom object. Then add the Timeline component to the object's record page.

SEE ALSO:

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

Financial Services Cloud Community Licenses

Make updates to Financial Services Cloud permission set licenses.

IN THIS SECTION:

Update Your Experience Cloud Sites Permission Set Licenses
The permission set licenses for Financial Services Cloud Experience Cloud sites have changed to align more closely with the Experience Cloud licenses. **Complete the required update by Friday January 13, 2023.**

Update Your Experience Cloud Sites Permission Set Licenses

The permission set licenses for Financial Services Cloud Experience Cloud sites have changed to align more closely with the Experience Cloud licenses. **Complete the required update by Friday January 13, 2023.**

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 Experience Cloud offers a permission set license for each product version so that new capabilities can be added to each license as appropriate. The new licenses are:

- Financial Services For Customer Community
- Financial Services For Customer Community Login
- Financial Services For Customer Community Plus
- Financial Services For Customer Community Plus Login
- Financial Services For Partner Community
- Financial Services For Partner Community Login

These licensing changes don't impact existing capabilities. Relevant permissions are carried over to the new permission set licenses. New Financial Services Cloud capabilities are added only to the new permission set licenses so make the updates to access new features. Note that the old permission sets can no longer be assigned to users.

How: Reassign the new permission set licenses to your users.

1. Assign the new permission set licenses to your users.

2. Unassign the **Financial Services Community** and **Financial Services Community Extension** permission sets.

3. Unassign the **Financial Services Community** and **Financial Services Community Extension** permission set licenses.

> 📝 Note: You can perform this operation in Setup or by using Data Loader for bulk assignment. For information on using Data Loader to bulk assign permissions, see **Bulk-Assign Permission Set Licenses**. The context for this procedure is Health Cloud but the process is the same for Financial Services Cloud.

> 🛑 Important: If you have custom code that automatically manages the assignment of permission set licenses for Experience Cloud users, update the custom code to use the new permission set licenses.

SEE ALSO:

   Salesforce Help: Financial Services Cloud Experience Cloud (can be outdated or unavailable during release preview)

FlexCard-Based Policy 360 Component

Adopt the new FlexCard-based Policy 360 component for an improved end user experience and simplified configuration.

IN THIS SECTION:

Do More with the New FlexCard-Based Policy 360 Component
Use the new, easily customizable FlexCard-based Policy 360 component to show contextualized information at a glance. Provide user actions based on the context of the record details page that you view. Using this comprehensive view, agents can easily scan the available details and resolve customer queries quickly. You can embed FlexCards in other FlexCards and show more details on demand with a flyout.

Do More with the New FlexCard-Based Policy 360 Component

Use the new, easily customizable FlexCard-based Policy 360 component to show contextualized information at a glance. Provide user actions based on the context of the record details page that you view. Using this comprehensive view, agents can easily scan the available details and resolve customer queries quickly. You can embed FlexCards in other FlexCards and show more details on demand with a flyout.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions that have Financial Services Cloud enabled.

How: In Lightning App Builder, on the record page that you're editing or creating, drag FlexCard from the Components panel to the Lightning page canvas location where you want to position the component. In the component properties panel, in the FlexCard Name field, select a FlexCard.

SEE ALSO:

Salesforce Help: FlexCard–Based Policy 360 Component for Financial Services Cloud

Wealth Management and Retail Banking

Minimize customer churn by using the new CRM Analytics templates for Wealth Management and Retail Banking. Maximize your revenue by using the other new CRM Analytics templates for Wealth Management. With these templates, you can get predictions about customers who are likely to churn, customers who are likely to add more assets, and recommended products that you can pitch to customers.

IN THIS SECTION:

Reduce Churn of Wealth Management Customers

Determine wealth management customers who are likely to churn and get actionable insights to reduce their likelihood to churn. Reducing customer churn improves customer loyalty and spend.

Increase Your Assets Under Management from Wealth Management Customers

Determine which wealth management customers are likely to add more assets in a specific period. Pursue such customers by pitching products for sale to increase your assets under management.

Maximize Your Revenue by Recommending the Right Products to Customers

Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.

Reduce Churn of Retail Banking Customers

Identify retail banking customers who are likely to churn and get actionable insights to reduce their likelihood to churn. Reducing customer churn increases loyalty and spend.

Reduce Churn of Wealth Management Customers
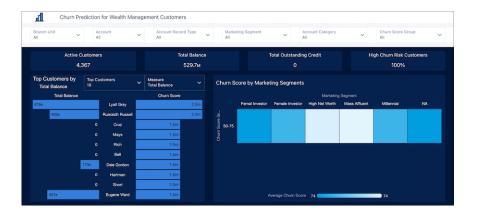
Determine wealth management customers who are likely to churn and get actionable insights to reduce their likelihood to churn. Reducing customer churn improves customer loyalty and spend.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Financial Services Cloud.

Who: The Customer Churn Risk for Wealth Management template is available to users with the Revenue Intelligence for Financial Services license.

How: Go to CRM Analytics Studio, and then create your app by using the Customer Churn Risk for Wealth Management template.

The Churn Prediction for Wealth Management dashboard shows details of customers who are likely to churn based on prediction scores.

SEE ALSO:

> *Financial Services Cloud Administrator Guide*: Reduce Churn of Wealth Management Customers (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Use Wealth Management Customer Churn Prediction Dashboards (can be outdated or unavailable during release preview)

Increase Your Assets Under Management from Wealth Management Customers

Determine which wealth management customers are likely to add more assets in a specific period. Pursue such customers by pitching products for sale to increase your assets under management.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Financial Services Cloud.

Who: The Customer Likelihood of Adding Assets template is available to users with the Revenue Intelligence for Financial Services license.

How: Go to CRM Analytics Studio, and then create your app by using the Customer Likelihood of Adding Assets template.

The Customer Likelihood of Adding Assets dashboard shows details of customers who are likely to add more assets based on their Assets under Management and prediction scores.

SEE ALSO:

> *Financial Services Cloud Administrator Guide*: Increase Your Assets Under Management from Wealth Management Customers (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Use the Customer Likelihood of Adding Assets Dashboard (can be outdated or unavailable during release preview)

Maximize Your Revenue by Recommending the Right Products to Customers

Get predictions about recommended products that you can pitch to customers who are likely to buy the products in a certain period. Maximize your revenue by persuading the customers to buy the recommended products.
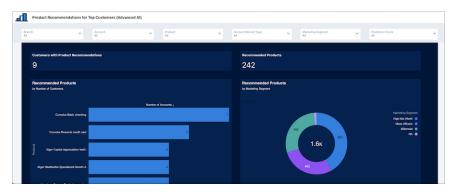
Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Financial Services Cloud.

Who: The Advanced AI for Product Recommendations and Basic AI for Product Recommendations templates are available to users with the Revenue Intelligence for Financial Services license.

How: Go to CRM Analytics Studio, click **Create**, and then select **App**:

- To use external data for getting product recommendations by using snapshot data in Salesforce, select the **Advanced AI for Product Recommendations** template.
- To get product recommendations by using cluster transformation, select the **Basic AI for Product Recommendations** template.

The Product Recommendations for Top Customers dashboard shows details of the recommended products based on the number of customers and marketing segments.

SEE ALSO:

 Financial Services Cloud Administrator Guide: Maximize Your Revenue by Recommending the Right Products to Customers (can be outdated or unavailable during release preview)

 Salesforce Help: Use the Product Recommendations Dashboards (can be outdated or unavailable during release preview)

Reduce Churn of Retail Banking Customers
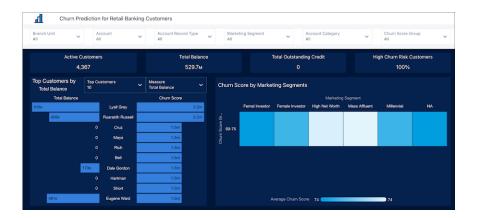
Identify retail banking customers who are likely to churn and get actionable insights to reduce their likelihood to churn. Reducing customer churn increases loyalty and spend.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Financial Services Cloud.

Who: The Customer Churn Risk for Retail Banking template is available to users with the Revenue Intelligence for Financial Services license.

How: Go to CRM Analytics Studio, and then create your app by using the Customer Churn Risk for Retail Banking template.

The Churn Prediction for Retail Banking Customers dashboard shows details of customers who are likely to churn based on prediction scores.

SEE ALSO:

    Financial Services Cloud Administrator Guide: Reduce Churn of Retail Banking Customers (can be outdated or unavailable during release preview)

    Salesforce Help: Use the Retail Banking Customer Churn Prediction Dashboards (can be outdated or unavailable during release preview)

Tear Sheet Generation

You users can now generate a document with information from one or more objects and attach it to a record page.

IN THIS SECTION:

Summarize Valuable Information from Objects in a Document
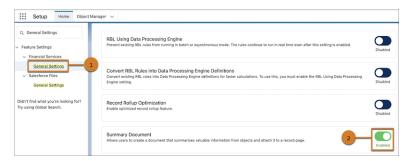
To be prepared for client meetings, your users need information quickly and easily. By using the new Summary Document component, your users can quickly generate a tear sheet that contains information from one or more objects. To quickly access the document, your users can attach the document to a record page where the component is added. The Summary Document component leverages the Document Generation feature to generate documents that use the specified sample server-side OmniScripts. You can also create your own OmniScripts to generate documents.

Summarize Valuable Information from Objects in a Document
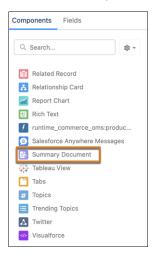
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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled, OmniStudio Winter '23 or later with DocGen functionality is installed.

How:

From Setup, in the Quick Find box, enter `General Settings`, and then under Financial Services Cloud, select **General Settings** (1). Enable **Summary Document** (2).

Next, add the Summary Document component to the Account, Contact, or Financial Deal record page layout.

SEE ALSO:
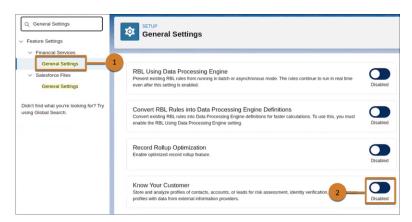
    Salesforce Help: Summarize Valuable Information from Objects in a Document(can be outdated or unavailable during release preview)

Streamline the Know Your Customer Process For Your Users

Your users can now easily perform identity verification, risk assessment, and screening checks of parties. By using the new Know Your Customer (KYC) data model, your users can use data from external sources to verify documents submitted during an assessment, know more about a prospect, or categorize parties based on their risk assessment. Parties here can be accounts, contacts, or leads.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud is enabled.

How:

From Setup, in the Quick Find box, enter `General Settings`, and then under Financial Services Cloud, select **General Settings** (1). Enable **Know Your Customer** (2).

SEE ALSO:

> *Salesforce Help*: Know Your Customers (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Financial Services Cloud Developer Guide (can be outdated or unavailable during release preview)

Create a Financial Services Cloud Pre-Release Trial Org

Sign up for a Financial Services Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Who: This pre-release trial org is great for admins, architects, and developers. You don't need any special permissions to sign up for an org.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/signup/financialservices-cloud-prerelease-trial/. The page is available when the pre-release is open. After your org is created, you'll receive an email with login details.

> 🗒️ Note:
>
> - Winter '23 pre-release trial orgs are available until October 15, 2022.
> - Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

SEE ALSO:

> *Salesforce Help*: Create a Financial Services Cloud Trial Org and Explore (can be outdated or unavailable during release preview)

Get Started Faster with Guided Setups

Discover the new guided setups for Financial Services Cloud.

IN THIS SECTION:

Get ARC 1.0 Up and Running with Ease

View ARC Relationship Graphs with objects that are important to your users. With a new guided setup, we'll walk you through some preliminary steps, adding the ARC 1.0 component to a page layout, and creating and assigning permission sets.

Get Branch Management Up and Running with Ease

Track branch performance and productivity with Branch Management. With a new guided setup, we'll walk you through setting up permissions and adding the Branch Selector components to apps.

Get Compliant Data Up and Running with Ease

Compliant Data Sharing lets admins and compliance managers configure advanced data sharing rules, so that they can improve compliance with regulations and company policies. With a new guided setup, we'll walk you through setting up Compliant Data Sharing.

Get Financial Accounts, Financial Account Roles, and Financial Account Transactions Up and Running with Ease

Agents need a comprehensive view of financial account details to resolve a customer query quickly and efficiently. Depending on your requirements, you can configure Financial Accounts, Roles, and Transactions. With a new guided setup, we'll walk you through assigning permissions, providing access to financial account record types and page layouts, and customizing lightning pages to view financial accounts and transactions.

Get Households Up and Running with Ease

Householding gives you the flexibility to organize your customers in ways that are meaningful to you. With a new guided setup, we'll walk you through configuring relationship visualization, customizing the Group Builder Edit window, and defining relationship roles.

Get Interest Tags Up and Running with Ease

Wealth managers, bankers, and other users can add custom Interest Tags to client records to capture client needs, interests, and prospecting opportunities. With a new guided setup, we'll walk you through some preliminary steps, configuring interest tags and categories, and working with interest tags.

Get Life Events Up and Running with Ease

The Life Events or Business Milestones component provides you an at-a-glance view of your customers' life events or business milestones. You can use these details to identify upcoming opportunities and devise timely personalized offers and engagement. With a new guided setup, we'll walk you through adding and configuring the Life Events component, activating or deactivating event or milestone types, capturing unique events, and configuring contextual actions.

Get Mortgage Up and Running with Ease

Mortgage for Financial Services Cloud includes a data model for mortgage applications, standard flow templates, and flow screen components. With a new guided setup, we'll walk you through setting up the permission and access you must work with mortgage features.

Get Record Association Builder Up and Running with Ease

Define your own criteria for automatically linking new or changed records with the branches that work with them. With a new guided setup, we'll walk you through setting up permissions, enabling Record Association Builder, and getting started with defining criteria.

Get Record Rollups Up and Running with Ease

Record rollups aggregate information from related records for a number of objects at a client or group level. With a new guided setup, we'll walk you through turning on record rollups, enabling it for some key objects, and optimizing the performance.

Get Rollup by Lookup Rules Using Data Processing Engine Up and Running with Ease

By using the new guided setup, your users can now perform Rollup-by-Lookup (RBL) calculations with Data Processing Engine (DPE) faster. They can follow simple step-by-step instructions to complete all tasks from enabling RBL using the Data Processing Engine framework, to reviewing and assigning permissions, and converting RBL Rules into DPE definitions.

Get ARC 1.0 Up and Running with Ease

View ARC Relationship Graphs with objects that are important to your users. With a new guided setup, we'll walk you through some preliminary steps, adding the ARC 1.0 component to a page layout, and creating and assigning permission sets.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Actionable Relationship Center (ARC) (can be outdated or unavailable during release preview)

Get Branch Management Up and Running with Ease

Track branch performance and productivity with Branch Management. With a new guided setup, we'll walk you through setting up permissions and adding the Branch Selector components to apps.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

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

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Compliant Data Sharing lets admins and compliance managers configure advanced data sharing rules, so that they can improve compliance with regulations and company policies. With a new guided setup, we'll walk you through setting up Compliant Data Sharing.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Compliant Data Sharing (can be outdated or unavailable during release preview)

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Agents need a comprehensive view of financial account details to resolve a customer query quickly and efficiently. Depending on your requirements, you can configure Financial Accounts, Roles, and Transactions. With a new guided setup, we'll walk you through assigning permissions, providing access to financial account record types and page layouts, and customizing lightning pages to view financial accounts and transactions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Provide a Comprehensive View of Customers' Financial Account Details (can be outdated or unavailable during release preview)

Get Households Up and Running with Ease

Householding gives you the flexibility to organize your customers in ways that are meaningful to you. With a new guided setup, we'll walk you through configuring relationship visualization, customizing the Group Builder Edit window, and defining relationship roles.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

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The Life Events or Business Milestones component provides you an at-a-glance view of your customers' life events or business milestones. You can use these details to identify upcoming opportunities and devise timely personalized offers and engagement. With a new guided setup, we'll walk you through adding and configuring the Life Events component, activating or deactivating event or milestone types, capturing unique events, and configuring contextual actions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

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How: Navigate to Guided Setup from Setup.

Get Record Association Builder Up and Running with Ease

Define your own criteria for automatically linking new or changed records with the branches that work with them. With a new guided setup, we'll walk you through setting up permissions, enabling Record Association Builder, and getting started with defining criteria.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Record Association Builder (can be outdated or unavailable during release preview)

Get Record Rollups Up and Running with Ease

Record rollups aggregate information from related records for a number of objects at a client or group level. With a new guided setup, we'll walk you through turning on record rollups, enabling it for some key objects, and optimizing the performance.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

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

Get Rollup by Lookup Rules Using Data Processing Engine Up and Running with Ease

By using the new guided setup, your users can now perform Rollup-by-Lookup (RBL) calculations with Data Processing Engine (DPE) faster. They can follow simple step-by-step instructions to complete all tasks from enabling RBL using the Data Processing Engine framework, to reviewing and assigning permissions, and converting RBL Rules into DPE definitions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Rollup-by-Lookup with Data Processing Engine (can be outdated or unavailable during release preview)

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Group Benefits

Represents the association of a Contract Group Plan to a Group Class
Use the new `ContractGroupPlanGroupClass` object.

Insurance Transaction Management

Associate the insurance policy participant with the claim coverage
Use the new `InsurancePolicyParticipantId` field on the `ClaimCoverage` object.

Store the name of the writing insurance carrier associated with the account
Use the new `WritingCarrierAccountId` field on the `InsurancePolicy` object.

Associate the intermediary account with the insurance policy
Use the new `IntermediaryAccountId` field on the `InsurancePolicy` object.

The name of the billing insurance carrier associated with the account
Use the new `BillingCarrierAccountId` field on the `InsurancePolicy` object.

The amount past due for the policy

Use the new `PastDueAmount` field on the `InsurancePolicy` object.

The current amount due for the policy

Use the new `CurrentDueAmount` field on the `InsurancePolicy` object.

The current total term premium of all policy versions

Use the new `TotalTermPremiumAmount` field on the InsurancePolicy object.

The current total term taxes of all policy versions

Use the new `TotalTermTaxAmount` field on the `InsurancePolicy` object.

The current total term fees of all policy versions

Use the new `TotalTermFeeAmount` field on the `InsurancePolicy` object.

View the current status of a policy transaction

Use the new `Status` field on the `InsurancePolicyTransaction` object.

Interaction

View the date and time when a sync is performed to create or update an interaction from an email client or other solutions in Salesforce

Use the new `LastSyncedDateTime` field on the Interaction and Interaction Attendee object.

Know Your Customer

View information about the profile of a party, such as a contact, account, or lead

Use the new `PartyProfile` object.

View information about the address of a party

Use the new `PartyProfileAddress` object.

View information about the risk assessment done for a party

Use the new `PartyProfileRisk` object.

View information about the identity verification checks done for a party

Use the new `PartyIdentityVerification` object.

View information about the identity verification done for a party

Use the new `PartyIdentityVerificationStep` object.

View information about the individual screening done for a party

Use the new `PartyScreeningSummary` object.

View information about the screening process conducted for a party

Use the new `PartyScreeningStep` object.

Workers Compensation

Represents the payout plan details for a claim, such as payment frequency, duration, and payouts

Use the new `ClaimPayoutPlan` object.

Represents the information captured from the certificate of capacity, such as the party's capacity to work, a timeline for recovery, and return to work

Use the new `PartyCertifiedCapacity` object.

Associate the claim payout plan with the claim coverage payment detail

Use the new `ClaimPayoutPlan` field on the `ClaimCoveragePaymentDetail` object.

View the date when payment is scheduled

Use the new `ScheduledPaymentDate` field on the `ClaimCoveragePaymentDetail` object.

Specify the application using the party income to populate data

Use the new `UsageType` field on the `PartyIncome` object.

Associate the claim with the party income.

Use the new `ClaimId` field on the `PartyIncome` object.

SEE ALSO:

Salesforce Help: Financial Services Cloud Developer Guide (can be outdated or unavailable during release preview)

Get Started with FSC Insurance Analytics Fast Start

Create an app from the FSC Insurance Analytics Fast Start template and give the Financial Services Cloud customers a quick way to apply the power of CRM Analytics to the data in their Book of Business. Use the FSC Insurance Analytics Fast Start dashboards to analyze the Book of Business and identify cross-sell opportunities in the existing customer base.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud is enabled.

Who: To create an app from the FSC Insurance Analytics Fast Start template, you need the FSCAnalyticsPlus add-on license.

How: Go to CRM Analytics Studio and create your app by using the FSC Insurance Analytics Fast Start template.

Improve Business and Customer Relationship with Analytics for Retail Banking

Manage your branch and customers better by using the new dashboards in Analytics for Retail Banking. The Branch Unit Related Records Analysis dashboard provides insights into the Branch Unit Related Records and identifies the branches and bankers with the maximum number of leads and opportunities. Use these insights to identify the areas that need attention and devise strategies to improve branch performance. The Interest Tags dashboard focuses more on your customers' areas of interest and identifies the top-rated interest tags for each customer segment and category. Use these insights to devise strategies and personalize customer interactions and offers to enhance customer experience and build a deep customer relationship.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To create an app from the Analytics for Retail Banking template, you need the FSCAnalyticsPlus add-on license.

How: Go to CRM Analytics Studio and create your app by using the Analytics for Retail Banking template.

Referral Scoring for Financial Services Cloud is Being Retired

Referral Scoring for Financial Services Cloud is being retired on October 03, 2022. After Referral Scoring is retired, you can't set up referral scoring models or view referral scoring cards. The Referrals Lightning component is also being removed from the home page. We recommend you to migrate to Einstein Prediction Builder and rebuild your Referral Scoring models.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, and Unlimited editions with Financial Services Cloud and the CRM Analytics for Financial Services add-on license.

SEE ALSO:

Knowledge Article: Referral Scoring Feature for Financial Services Retirement

Financial Services Cloud Administrator Guide: Einstein Referral Scoring for Financial Services Cloud

Salesforce Help: Einstein Prediction Builder

Life Events or Business Milestones Has a New Name

We've renamed the Life Events or Business Milestones component and the Life Events and Business Milestones Setup page to Events and Milestones. We didn't make changes to this component's functionality—you can still use it to show life events for contacts or person accounts, and business milestones for accounts.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Health Cloud

Health Cloud offers new and improved solutions that help make your operations run smoother and better. Health Cloud has a new flavor designed for key use cases in the Life Sciences segment. Advanced Therapy Management is a new solution that helps therapy coordinators book multiple appointments across multiple sites at one go. Virtual Care now integrates with Amazon Chime to offer your users an easy-to-use, feature-rich video platform. Make video visits even more convenient for patients by providing self-service scheduling and easy access links to the video platform. The Discovery Framework powers Assessments that provide a clearer picture of a patient's health. Provider Search transforms provider data into a searchable format using Data Processing Engine to improve performance and scalability. Medication Therapy Management helps pharmacists conduct comprehensive and targeted medication reviews that help improve medication adherence and patient safety. Utilization Management helps your users to review prior authorization requests with ease. Unified Health Scoring adds support for Enhanced Timeline to display action history.

IN THIS SECTION:

Health Cloud for Life Sciences

Health Cloud has a new flavor designed for key use cases in the Life Sciences sector. If you're a player in these spaces, this leaner version of Health Cloud provides a more focused experience that streamlines provider engagement, commercial excellence, and access to therapy.

Advanced Therapy Management

Book multiple appointments across multiple sites concurrently with Health Cloud's new Advanced Therapy Management feature. Create a series of steps that are part of a procedure, configure site-to-site relationships for the territories where the steps are performed, and configure appointment slots by setting up available capacity of multiple work types and service resources assigned to a service territory.

Identity Verification

A customer service representative or contact center agent (CSR or CCA) can now verify the identity of a patient or member and their authorized representative for engagements initiated via OpenCTI, Omni-Channel, and for in-person or physical engagements. CSRs or CCAs can access the verification flow from the utility bar and from an Engagement Interaction or a Voice Call record page. If just two levels of verification aren't sufficient for your business requirements, configure tertiary or more levels of verification. If a person initiating an engagement doesn't exist in the system, you can now enable your CSRs and CCAs to create a lead. Save non-personal verification data to help detect potential cases of compliance violations and identity breach. Disable auto-creation of engagement attendees. Enable CSRs and CCAs to visually track progress of engagement interactions. Finally, change the organization-wide default sharing settings of engagement interactions. Also, your users can now share and transfer ownership of engagement interactions with their peers..

Enable Performance and Scalability for Provider Search

To improve performance and scalability, an upgraded version of Provider Search now uses Data Processing Engine (DPE) for transforming provider data into a format that users can search. With the new provider search, you can run a data sync in production on demand.

Lower Costs and Increase Healthcare Access with Virtual Care

Transportation barriers, geographic barriers, mobility barriers, and limited appointment availability are significant obstacles to obtaining healthcare. Increase access to care by enabling Virtual Care between consumers and healthcare providers. Virtual Care uses an integration with Amazon Chime to offer your users an easy-to-use, feature-rich video platform.

Administer Health Assessments to Collect Patient Data Efficiently

Get a better picture of a patient's health through easy to administer health assessments. Use the power of OmniStudio and Discovery Framework to create custom assessments. Add the assessments component to a patient's record page and have easily accessible data to identify gaps in care and uncover health issues.

Medication Management

Health Cloud's Medication Management is now equipped with Medication Therapy Management, a range of services that help patients optimize their medication regimen. By conducting comprehensive and targeted medication therapy reviews for patients, your pharmacists can proactively improve patient safety and reduce medication-related errors.

Review Prior Authorization Requests with Utilization Management

Optimize cost of care, improve health outcomes, and manage your authorization requests more efficiently with the new prior authorization review processes. The OmniScript processes reduce decision time by gathering information about benefits coverage and providers' participation in payer networks, all in one place.

Unified Health Scoring Enhancements

Unified Health Scoring now gives your users greater visibility into interventions with their patients or members.

Care Coordination for Slack

Help your care coordinators stay up to date on the healthcare status of their patients using notifications from Slack. These notifications help care coordinators connect with patients at the right time, resulting in greater patient engagement and reduced healthcare costs. Your care coordinators can use dedicated Slack channels to get critical notifications for higher priority changes in their patients' health.

Refresh the Patient Card

You can now refresh the patient card component to show the latest patient data. A useful timestamp lets you know that you're viewing the latest information.

Objects in the FHIR R4-Aligned Clinical Data Model have Updated Sharing Options

You now have more options when deciding how records created in the FHIR R4-aligned Clinical data model are shared with your users.

Replacing the EHR Data Model with the Clinical Data Model

We've extended the timeline for when the EHR data model is replaced with the Clinical data model. Starting with the Spring '23 release, new customers can't create records for 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.

Create a Health Cloud Pre-Release Trial Org

Sign up for a Health Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

Salesforce Healthcare API

Health Cloud includes new Healthcare API that can interact with any system that utilizes Fast Healthcare Interoperability Resources (FHIR) API.

New Invocable Action in Health Cloud

Do more with the new invocable action.

Health Cloud for Life Sciences

Health Cloud has a new flavor designed for key use cases in the Life Sciences sector. If you're a player in these spaces, this leaner version of Health Cloud provides a more focused experience that streamlines provider engagement, commercial excellence, and access to therapy.

Here's the list of Health Cloud features included in Winter '23:

- Advanced Therapy Management
- Care Program Management
- Intelligent Sales
- Sales Agreements
- Account Manager Targets
- Sales Forecasts
- Advanced Account Forecasting
- Enhanced Timeline
- Intelligent Document Automation
- Digital Process Automation (Omnistudio, Business Rules Engine, Data Processing Engine)
- Assessments

SEE ALSO:

Salesforce Help: Health Cloud for Life Sciences

Advanced Therapy Management

Book multiple appointments across multiple sites concurrently with Health Cloud's new Advanced Therapy Management feature. Create a series of steps that are part of a procedure, configure site-to-site relationships for the territories where the steps are performed, and configure appointment slots by setting up available capacity of multiple work types and service resources assigned to a service territory.

IN THIS SECTION:

Guided Setup for Advanced Therapy Management

Use Advanced Therapy Management's guided setup to correctly configure data in your org so that users can start booking appointments. The easy-to-follow set of tasks ensures that you don't miss any prerequisites, that your licenses are in place, and that you configured work procedures and related steps correctly. Readily accessible links to help topics provide the necessary details and context for each task. In-app links help you create records and track your progress.

Access the Appointment Booking Screen with the Appointment Slot Lightning Component

Help users save time by adding the new Appointment Slot Lightning App Builder component to the record page of the Account, Case, Opportunity, or Care Program Enrollee object. Easily accessible buttons like Book New Slots, Reschedule Slots, and Cancel Slots help users quickly navigate to the Schedule Appointment and Reschedule Appointment tabs. Users can also view the details of scheduled and rescheduled slot chains at a glance.

Schedule Multiple Appointments Concurrently

Multi-Step Scheduling makes it possible to book a chain of appointment slots for a series of work procedure steps all at once. Find the exact appointments that you need with basic search criteria such as work procedure, work procedure organization, and date ranges of a work type. Or opt for an advanced search of work types and their locations. Results show available slots for all steps that are part of a work procedure—such as apheresis, manufacturing, and infusion—configured according to their lead times and service territory relationships.

Schedule Appointments When No Slots Are Published

Users can book slots for a work type even if the associated service territory hasn't published available slots for the work type.

Easily Cancel and Reschedule a Series of Appointments

Users can easily accommodate sudden changes in availability by canceling slot chains or rescheduling new appointments according to the patients' availability.

Seamlessly Accept Requests with the New Confirm Booking Request Flow

Make it easier for internal bio pharmaceutical users like gene therapy coordinators to confirm and accept slot booking requests with the new Confirm Booking Request Flow.

View Total Enrollee Count in Advanced Therapy Management

Be ready for any increase in the number of advanced therapy enrollees by keeping track of the total number of enrollees.

Advanced Therapy Management Has an Add-On License for Added Capacity

Easily accommodate increases in number of advanced therapy enrollees with Advanced Therapy Management's add-on license. Advanced Therapy Management - Patients (500) offers an added capacity of 500 enrollees.

Guided Setup for Advanced Therapy Management

Use Advanced Therapy Management's guided setup to correctly configure data in your org so that users can start booking appointments. The easy-to-follow set of tasks ensures that you don't miss any prerequisites, that your licenses are in place, and that you configured work procedures and related steps correctly. Readily accessible links to help topics provide the necessary details and context for each task. In-app links help you create records and track your progress.

How: From Setup, go to Feature Settings. Under Health Cloud, select **Multi-Step Scheduling**.

SEE ALSO:

Salesforce Help: Set Up Data For Advanced Therapy Management in Your Org
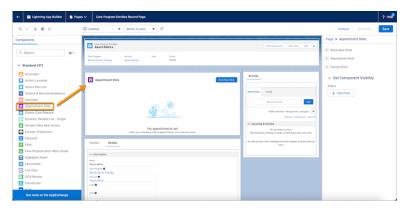
Access the Appointment Booking Screen with the Appointment Slot Lightning Component

Help users save time by adding the new Appointment Slot Lightning App Builder component to the record page of the Account, Case, Opportunity, or Care Program Enrollee object. Easily accessible buttons like Book New Slots, Reschedule Slots, and Cancel Slots help users quickly navigate to the Schedule Appointment and Reschedule Appointment tabs. Users can also view the details of scheduled and rescheduled slot chains at a glance.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.

How: In Lightning App Builder, drag the Appointment Slots components onto an editable part of the page. In the Properties pane for Appointment Slots, select **Book New Slots**, **Reschedule Slots**, and **Cancel Slots**.

SEE ALSO:

  Salesforce Help: Learn About the Advanced Therapy Management Licenses

  Salesforce Help: Create Profiles for Advanced Therapy Management Users

  Salesforce Help: Create Internal and External Users for Advanced Therapy Management

  Salesforce Help: Add the Appointment Slots Lightning Component to a Record Page

Schedule Multiple Appointments Concurrently
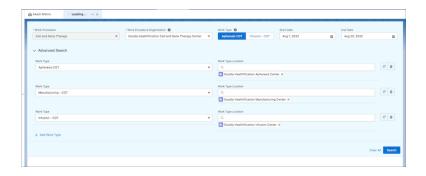
Multi-Step Scheduling makes it possible to book a chain of appointment slots for a series of work procedure steps all at once. Find the exact appointments that you need with basic search criteria such as work procedure, work procedure organization, and date ranges of a work type. Or opt for an advanced search of work types and their locations. Results show available slots for all steps that are part of a work procedure—such as apheresis, manufacturing, and infusion—configured according to their lead times and service territory relationships.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud or Health Cloud for Life Sciences license, and the Asset Scheduler Add-On license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.

How: First, add the Appointment Slots Lightning App Builder component to an enrollee record page. You can also add it to the record pages of the Account, Case, or Opportunity objects.

From the App Launcher, find and select Care Program Enrollee. Select the enrollee's record and click **Book New Slots** to open the Schedule Appointment tab. Enter search criteria, then select from the list of available slots to book appointments.

SEE ALSO:

Salesforce Help: Schedule Appointments Using Published Slots

Schedule Appointments When No Slots Are Published

Users can book slots for a work type even if the associated service territory hasn't published available slots for the work type.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud or Health Cloud for Life Sciences license, and the Asset Scheduler Add-On license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.
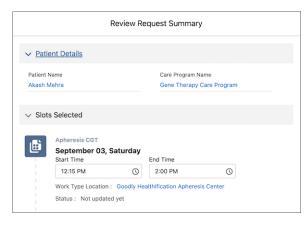
How: First, add the Appointment Slots Lightning App Builder component to an enrollee record page. You can also add it to the record pages of the Account, Case, or Opportunity objects.

Enter the search criteria in the Schedule Appointment tab. Even if a work type has no published slots, select slots in the same chain for other work types that have published slots, and click **Book New Slots**. In the Review Request Summary window, enter start time and end time for the work type that has no published slots, and click **Submit**.

Note: If no slots are published for the Manufacturing work type, reach out to the service territory contact for details.

SEE ALSO:

Salesforce Help: Schedule Appointments When Slots Are Not Published

Easily Cancel and Reschedule a Series of Appointments

Users can easily accommodate sudden changes in availability by canceling slot chains or rescheduling new appointments according to the patients' availability.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud or Health Cloud for Life Sciences license, and the Asset Scheduler Add-On license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.

How: First, add the Appointment Slots Lightning App Builder component to an enrollee record page. You can also add it to the record pages of the Account, Case, or Opportunity objects.

On the care program enrollee record page, click **Reschedule Slots** next to a slot chain. Enter search criteria to find alternative appointment times.

To cancel a slot chain, click **Cancel Slots** to remove the upcoming appointments.

SEE ALSO:

Salesforce Help: Reschedule a Series of Appointments for an Advanced Therapy

Salesforce Help: Cancel a Series of Appointments for an Advanced Therapy

Seamlessly Accept Requests with the New Confirm Booking Request Flow

Make it easier for internal bio pharmaceutical users like gene therapy coordinators to confirm and accept slot booking requests with the new Confirm Booking Request Flow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with Health Cloud or Health Cloud for Life Sciences license, and the Asset Scheduler Add-On license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.

Why: The automated Salesforce Flow enables the user to confirm that they want to approve the booking, and schedules the service appointments.

How: First, add the quick action button for confirming booking requests.

From App Launcher, go to the record page where you added the quick action. To launch the automated Confirm Booking Slots Salesforce Flow, click the quick action button in the highlights panel of the record page. To schedule the requested appointments, click **Confirm**.

SEE ALSO:

Salesforce Help: Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management

Salesforce Help: Confirm Slot Booking Request

View Total Enrollee Count in Advanced Therapy Management

Be ready for any increase in the number of advanced therapy enrollees by keeping track of the total number of enrollees.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users who are assigned the new Multi-Step Scheduling permission set, and the new Multi-Step Scheduling permission set license.

How: From Setup, go to Multi-step Scheduling Settings. Under Feature Settings, click **Multi-step Scheduling Settings**, and then select the Utilization Count tab.

Advanced Therapy Management Has an Add-On License for Added Capacity

Easily accommodate increases in number of advanced therapy enrollees with Advanced Therapy Management's add-on license. Advanced Therapy Management - Patients (500) offers an added capacity of 500 enrollees.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud or Health Cloud for Life Sciences license.

How: Contact your Salesforce representative to learn about purchasing the Advanced Therapy Management - Patients (500) license.

Identity Verification

A customer service representative or contact center agent (CSR or CCA) can now verify the identity of a patient or member and their authorized representative for engagements initiated via OpenCTI, Omni-Channel, and for in-person or physical engagements. CSRs or CCAs can access the verification flow from the utility bar and from an Engagement Interaction or a Voice Call record page. If just two levels of verification aren't sufficient for your business requirements, configure tertiary or more levels of verification. If a person initiating an engagement doesn't exist in the system, you can now enable your CSRs and CCAs to create a lead. Save non-personal verification data to help detect potential cases of compliance violations and identity breach. Disable auto-creation of engagement attendees. Enable CSRs and CCAs to visually track progress of engagement interactions. Finally, change the organization-wide default sharing settings of engagement interactions. Also, your users can now share and transfer ownership of engagement interactions with their peers..

IN THIS SECTION:

Verify the Identity of a Member When an Engagement Is Physically Initiated

Your users can now verify the identity of a member or their authorized representative who has reached out to your organization in person.

Verify the Identity of a Customer When an Engagement Is Initiated Via Omni-Channel

Enable your users to verify the identity of a member or their authorized representative who initiates an engagement over voice call via Omni-Channel.

Enable Users to Access the Verification Flow from the Record Page or the Utility Bar

If your users must perform identity verification whether an engagement interaction or a voice call record ID is passed into the configured identity verification flow, then use the Verify Customer Identity Base Flow flow template. Add this flow to the utility bar and to the engagement interaction and the voice call record pages. If a record ID is passed into a flow, users access the flow from the corresponding record page. If there's no record ID, users launch the flow from the utility bar.

Implement Tertiary Verification

Earlier, you could configure a two-level verification process for the CSR or the CCA to verify the identities of the persons calling on behalf of members and of the members themselves. Consider an authorized member representative (the caller), the member, and the legal ward of the member. If the representative calls on behalf of the member with a request involving the legal ward's account details, the CSR or the CCA would have to verify the identities of 1) the caller, 2) the member, and 3) the legal ward. The two-level verification process isn't adequate to handle this requirement. Now you can configure 3 or more levels of verification depending on your requirements.

Enable Users to Take Appropriate Actions for Prospective Members

What if a person connecting with the CSR or the CCA doesn't have a presence in the configured data source (Salesforce or external)? Earlier, the CSR or the CCA would have no choice but to say that they couldn't find their record in the system. You can now enable them to take an appropriate action, for example, create a lead.

Disable Auto-Creation of Engagement Attendees

When a person initiates an engagement with a CCA or CSRCCA\CSR, an internal engagement attendee record is automatically created. To disable automatic creation of internal engagement attendee records, turn the Auto-creation of Internal Attendee Record org permission off.

Enable Users to Visually Track the Process of Engagement Interactions

Use Path Assistant to create paths to guide your users through the steps of a business process, such as working on an engagement interaction from initiation to successful resolution. Configure a path assistant on the Engagement Interaction object and then add the Path component to the Engagement Interaction record page.

Manage Sharing and Ownership of Engagement Interactions

Use the Sharing Settings page to manage your organization-wide sharing defaults for Engagement Interaction. Manage user access to engagement interactions using role hierarchies. Facilitate prioritization and assignment of engagement interactions using queues. Your users too can change ownership of engagement interactions. If they need inputs on an engagement interaction from someone else, they can share the engagement interaction.

Save Member Verification Steps Invocable Action

The Verify Customer Identity flow template uses the Save Member Verification Steps action. This action stores the verification data (non-personal information) collected from the identity verification flow for auditing and reporting purposes.

Verify the Identity of a Member When an Engagement Is Physically Initiated

Your users can now verify the identity of a member or their authorized representative who has reached out to your organization in person.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: No setup is required to enable users to verify the identity of a person who has made in-person contact. Users have to create an engagement interaction record, fill in the required details, and get started with the verification flow.

Verify the Identity of a Customer When an Engagement Is Initiated Via Omni-Channel

Enable your users to verify the identity of a member or their authorized representative who initiates an engagement over voice call via Omni-Channel.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: In Flow Builder, create a flow using the Verify Customer Identity flow template. Next, create a Voice Call Lightning record page. Finally, make the flow available to agents by adding it to the Voice Call record page in Lightning App Builder.

Enable Users to Access the Verification Flow from the Record Page or the Utility Bar

If your users must perform identity verification whether an engagement interaction or a voice call record ID is passed into the configured identity verification flow, then use the Verify Customer Identity Base Flow flow template. Add this flow to the utility bar and to the engagement interaction and the voice call record pages. If a record ID is passed into a flow, users access the flow from the corresponding record page. If there's no record ID, users launch the flow from the utility bar.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: In Flow Builder, create a flow using the Verify Customer Identity Base Flow flow template. Next, create an Engagement Interaction and a Voice Call Lightning record page. Adding the flow to the Engagement Interaction and the Voice Call record pages in Lightning App Builder. Next, add the flow to the utility bar of a Lightning app using the App Manager.

Implement Tertiary Verification

Earlier, you could configure a two-level verification process for the CSR or the CCA to verify the identities of the persons calling on behalf of members and of the members themselves. Consider an authorized member representative (the caller), the member, and the legal ward of the member. If the representative calls on behalf of the member with a request involving the legal ward's account details, the CSR or the CCA would have to verify the identities of 1) the caller, 2) the member, and 3) the legal ward. The two-level verification process isn't adequate to handle this requirement. Now you can configure 3 or more levels of verification depending on your requirements.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: Create three records in the Identity Verification Process Detail object to represent primary, secondary, and tertiary stages of verification. Use the Linked Identity Verification Process Detail field to reference the record that represents the next stage of verification after the current one. The rest of the requirements are similar to other Identity Verification setup procedures.

Enable Users to Take Appropriate Actions for Prospective Members

What if a person connecting with the CSR or the CCA doesn't have a presence in the configured data source (Salesforce or external)? Earlier, the CSR or the CCA would have no choice but to say that they couldn't find their record in the system. You can now enable them to take an appropriate action, for example, create a lead.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

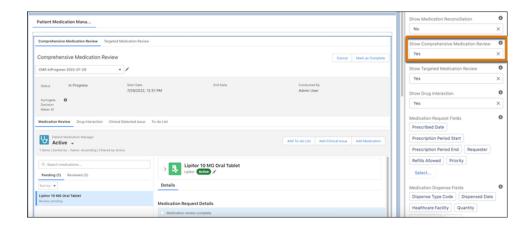**How:** In Flow Builder, create a flow using the Verify Customer Identity flow template. Open the Display Search Results screen component by double-clicking it. In the Edit Screen window, select Display Search Results. Notice the attributes, Allow Next When No Search Results Found and No Search Results. The attributes have the !CanContinueWithNoSearchResults and !HasSearchResults variables, which are booleans. If !HasSearchResults is set to False and !CanContinueWithNoSearchResults is set to True, the CCA or the CSR is allowed to click Next on the search results screen, even if the initiating attendee can't be found in the system.

In the Flow Builder, search for !CanContinueWithNoSearchResults in the resources and edit it to set its value to True.

Similarly, search for !HasSearchResults and make sure that it's set to False. As a result, the CCA or the CSR can continue with the verification process even if search results are empty. However, what must the next course of action be (create a lead record for example) is something that you have to configure by further customizing the flow.

Disable Auto-Creation of Engagement Attendees

When a person initiates an engagement with a CCA or CSRCCA\CSR, an internal engagement attendee record is automatically created. To disable automatic creation of internal engagement attendee records, turn the Auto-creation of Internal Attendee Record org permission off.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: From Setup, in the Quick Find box, enter Attendee Settings, and then select Attendee Settings. Turn off the org permission.

Enable Users to Visually Track the Process of Engagement Interactions

Use Path Assistant to create paths to guide your users through the steps of a business process, such as working on an engagement interaction from initiation to successful resolution. Configure a path assistant on the Engagement Interaction object and then add the Path component to the Engagement Interaction record page.
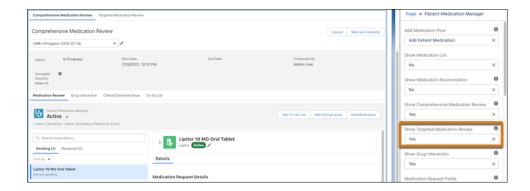
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Manage Sharing and Ownership of Engagement Interactions

Use the Sharing Settings page to manage your organization-wide sharing defaults for Engagement Interaction. Manage user access to engagement interactions using role hierarchies. Facilitate prioritization and assignment of engagement interactions using queues. Your users too can change ownership of engagement interactions. If they need inputs on an engagement interaction from someone else, they can share the engagement interaction.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: To set organization-wide default sharing settings, from Setup, in the Quick Find box, enter and select **Sharing Settings**. Search for Engagement Interactions and then edit the entry to change the default internal access value.

To manage access using role hierarchies, from Setup, in the Quick Find box, enter and select **Roles** and then set up roles.

To enable users to better manage their engagement interaction workload, from Setup, in the Quick Find box, enter and select **Queues**, and then create a queue.

You and the owner of an engagement interaction record can share the record with other org users. When sharing, you or the record owner can assign users Read or Read\Write access to the record. If the organization-wide default internal access is set to Public Read Only and you or the record owner provide Read access to other users when sharing a record, an error is thrown. Also, you or the owner of an engagement interaction record can change the ownership of a record to any other org user.

Save Member Verification Steps Invocable Action

The Verify Customer Identity flow template uses the Save Member Verification Steps action. This action stores the verification data (non-personal information) collected from the identity verification flow for auditing and reporting purposes.
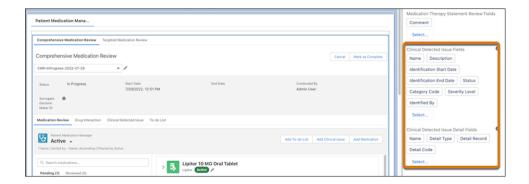
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

How: To use the Build Identity Verification Context action, in the Flow Builder, add an action to the flow you're creating or customizing and select **Save Member Verification Steps**.

Enable Performance and Scalability for Provider Search

To improve performance and scalability, an upgraded version of Provider Search now uses Data Processing Engine (DPE) for transforming provider data into a format that users can search. With the new provider search, you can run a data sync in production on demand.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to admin users with Data Pipelines Base user permission.

Why: Legacy Provider Search can continue to be used by existing orgs until Winter '24 release. Upgrading to the new version will allow you to take advantage of the performance benefits and future enhancements.

How: First, enable Data Pipelines. To turn on the upgraded Provider Search, go to the new **Provider Search Settings** page in Setup. Then select **Enable** Provider Search. Enabling Provider Search automatically disables Legacy Provider Search.

SEE ALSO:

Salesforce Help: Configure Provider Search to Help People Find Providers

Lower Costs and Increase Healthcare Access with Virtual Care

Transportation barriers, geographic barriers, mobility barriers, and limited appointment availability are significant obstacles to obtaining healthcare. Increase access to care by enabling Virtual Care between consumers and healthcare providers. Virtual Care uses an integration with Amazon Chime to offer your users an easy-to-use, feature-rich video platform.

IN THIS SECTION:

Enable and Set Up Virtual Care

Enable Video Visits, Provider Search, Intelligent Appointment Management, and Salesforce Scheduler so that your customers can schedule video visits with their providers.

Self-Schedule Video Calls

Make Video Visits even more convenient for patients by creating an Experience site with self-scheduling. Provide an intuitive video platform, automated appointment notifications, and easy access links for authenticated and guest users.

Use Guided Setup to Enable Video Visits

Configure Video Visits with efficiency and confidence by taking advantage of the Video Visits Guided Setup experience. A simple outline of the steps with links to other in-app Setup pages is available to keep you on track.

SEE ALSO:

Salesforce Help: Virtual Care

Enable and Set Up Virtual Care

Enable Video Visits, Provider Search, Intelligent Appointment Management, and Salesforce Scheduler so that your customers can schedule video visits with their providers.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled with Video Calls Add-On license.

Who: Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States. This feature is available to moderators who are assigned the Health Cloud Foundation license and Health Cloud Video Calls permission set. Enabling Virtual Care requires a separate Amazon account. Video Call access is available to authenticated and guest users with the Health Cloud Video Calls for Experience Cloud Permission Set.

Why: Provide the video call features that patients now expect such as the ability to adjust video and audio settings, use closed captioning, and rejoin a dropped call.

How: From Setup, in the Quick Find box, enter `Video Call`, and then select **Video Call Settings**. To enable Virtual Care, enable **Provider Search**, **Intelligent Appointment Management**, and **Salesforce Scheduler**. Virtual Care uses the Amazon Chime SDK and admins collaborate with their Amazon administrator to install a Cloud Formation template to configure the connection to the service.

SEE ALSO:

Salesforce Help: Get Your Org Ready for Virtual Care

Salesforce Help: Enable Video Calls

Self-Schedule Video Calls

Make Video Visits even more convenient for patients by creating an Experience site with self-scheduling. Provide an intuitive video platform, automated appointment notifications, and easy access links for authenticated and guest users.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled with the Video Calls Add-On license.

Who: Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States. 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. Video Call Scheduling is available to guests and authenticated users with Health Cloud Video Calls for Experience Cloud Permission Set.

How: Enable and configure Video Visits. Create an Experience site for patients. Drag the My Appointments component to your site from the Experience Builder Components panel for scheduling. Then add the Video Call component to a page for accessing the video appointment. Finally, configure a flow to send automated emails that use the provided email templates.

SEE ALSO:

Salesforce Help: Virtual Care Self Service

Use Guided Setup to Enable Video Visits

Configure Video Visits with efficiency and confidence by taking advantage of the Video Visits Guided Setup experience. A simple outline of the steps with links to other in-app Setup pages is available to keep you on track.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled with Video Calls Add-On license.

Who: Video Visits are currently only available to customers in Australia, Spain, United Kingdom, and the United States. This feature is available to moderators who are assigned the Health Cloud Foundation license and Health Cloud Video Calls permission set. Enabling Virtual Care requires a separate Amazon account.

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

SEE ALSO:

   Salesforce Help: Get Your Org Ready for Virtual Care

Administer Health Assessments to Collect Patient Data Efficiently

Get a better picture of a patient's health through easy to administer health assessments. Use the power of OmniStudio and Discovery Framework to create custom assessments. Add the assessments component to a patient's record page and have easily accessible data to identify gaps in care and uncover health issues.

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 platform license.

How: Download and Install the OmniStudio package. Configure the Assessments component in Lightning App Builder. In the Properties pane, customize the default Tab Label options and save your changes. You can also customize the fields shown in the list views of the Assessments component.

SEE ALSO:

   Salesforce Help: Provide Assessments to Analyze a Patient's Health

Medication Management

Health Cloud's Medication Management is now equipped with Medication Therapy Management, a range of services that help patients optimize their medication regimen. By conducting comprehensive and targeted medication therapy reviews for patients, your pharmacists can proactively improve patient safety and reduce medication-related errors.

IN THIS SECTION:

Improve Patient Health Outcomes with Comprehensive Medication Reviews

Help your pharmacists perform all-inclusive annual reviews with their patients to increase adherence to medication and ensure patient safety. Comprehensive Medication Review's structured and extensive evaluation process includes all of a patient's active medications and health conditions.

Overcome Medication-Related Problems with Targeted Medication Reviews

Help your pharmacists perform a focused review for actual or potential problems with specific medications in the patient's medication regimen. Targeted Medication Review's ongoing monitoring approach is a cost-effective option that helps to identify and proactively prevent or resolve medication issues.

Enhance Patient Safety by Identifying Clinical Issues during Medication Therapy Reviews

Detecting actual or potential clinical issues early and keeping patients informed about their medications and treatment prevents medication-related adverse events and improves safety.

Increase Patient Engagement by Helping Patients Take an Active Role in their Health Care

Set up predefined tasks for healthcare issues so that pharmacists can easily recommend to-do lists with important patient-specific action items to help mitigate patient issues, enhance patient-self care, and improve patient experience.

Simplify Medication Therapy Reviews Using the Start Medication Therapy Review Flow

Help pharmacists initiate comprehensive and targeted medication reviews seamlessly with the new Start Medication Therapy Review flow.

Get More Information on Each Medication

Now your users can get more information on their patients' medications. The Patient Medication Manager Lightning component now includes the medication category and branded alternative for generic medications.

Get Up and Running Quickly by Using the Guided Setup

Configure Medication Review and Medication Management 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 have to complete to set up your org. 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.

Improve Patient Health Outcomes with Comprehensive Medication Reviews

Help your pharmacists perform all-inclusive annual reviews with their patients to increase adherence to medication and ensure patient safety. Comprehensive Medication Review's structured and extensive evaluation process includes all of a patient's active medications and health conditions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

Why: Help your pharmacists to conduct a comprehensive medication review for patients who meet eligibility criteria and are enrolled in the Medication Therapy Management care program.

How: To turn on Medication Management and To-Do Lists, go to the Medication Management and Medication Review Settings page in Setup. Acknowledge the terms of use, and then enable **Medication Management** and **To-Do Lists**.

Next, edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, enable the **Comprehensive Medication Review** tab, and then select the fields that you need from the **Medication Therapy Statement Review Fields** section.

SEE ALSO:

Medication Therapy Management

Comprehensive Medication Review
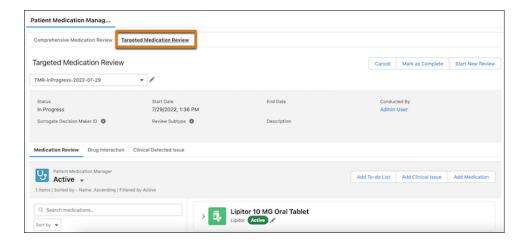
Overcome Medication-Related Problems with Targeted Medication Reviews

Help your pharmacists perform a focused review for actual or potential problems with specific medications in the patient's medication regimen. Targeted Medication Review's ongoing monitoring approach is a cost-effective option that helps to identify and proactively prevent or resolve medication issues.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

Why: Your pharmacists can now conduct a targeted medication review, along with comprehensive medication review, for eligible patients either quarterly or whenever required.

How: To turn on Medication Management, go to the Medication Management and Medication Review Settings page in Setup. Acknowledge the terms of use, and then enable **Medication Management**.

Next, edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, enable the **Targeted Medication Review** tab, and then select the fields that you need from the **Medication Therapy Statement Review Fields** section.

SEE ALSO:

[Medication Therapy Management](#)

[Targeted Medication Review](#)
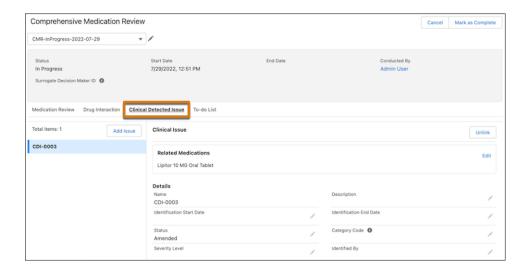
Enhance Patient Safety by Identifying Clinical Issues during Medication Therapy Reviews

Detecting actual or potential clinical issues early and keeping patients informed about their medications and treatment prevents medication-related adverse events and improves safety.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

Why: Making a record of clinical issues such as incorrect dosage or frequency during a comprehensive or targeted medication review helps patients to take recommended action to reduce medication risks.

How:

Edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, enable the **Comprehensive Medication Review** and **Targeted Medication Review** tabs. Then select the standard and custom fields that you need from the **Clinical Detected Issue Fields** and **Clinical Detected Issue Detail Fields** sections.

SEE ALSO:

Medication Therapy Management

Detect Clinical Issues with Patient's Medications

Increase Patient Engagement by Helping Patients Take an Active Role in their Health Care

Set up predefined tasks for healthcare issues so that pharmacists can easily recommend to-do lists with important patient-specific action items to help mitigate patient issues, enhance patient-self care, and improve patient experience.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

How: To turn on Medication Management and To-Do Lists, go to the Medication Management and Medication Review Settings page in Setup. Acknowledge the terms of use, and then enable **Medication Management** and **To-Do Lists**.

For each health issue that patients face, configure and publish a care plan template. Then, create an action plan template, add the required tasks, and publish the template. Next, create an action plan template assignment record and associate the care plan template and action plan template.

Now, edit a person account's Lightning record page, and select the **Patient Medication Manager** component. In the Properties pane, enable the **Comprehensive Medication Review** and **Targeted Medication Review** tabs, and select the fields that you need.

SEE ALSO:

> Medication Therapy Management
>
> Create Predefined Tasks for Medication Therapy Management
>
> Assign To-Do Lists to Address Patient Issues

Simplify Medication Therapy Reviews Using the Start Medication Therapy Review Flow

Help pharmacists initiate comprehensive and targeted medication reviews seamlessly with the new Start Medication Therapy Review flow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

Why: The flow streamlines the entire review initiation process. By determining the patient's cognitive status based on the health conditions, the flow makes it easy for your pharmacists to focus on the patient's medication therapy reviews.

How: To turn on Medication Management, go to the Medication Management and Medication Review Settings page in Setup. Acknowledge the terms of use, and then enable **Medication Management**.

From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Go to the **Start Medication Therapy Review** flow and customize the flow as per your company needs to provide additional flexibility to your pharmacists.

SEE ALSO:

> Medication Therapy Management
>
> Understand and Customize the Medication Therapy Review Flow
>
> Conduct a Medication Therapy Review For Your Patients

Get More Information on Each Medication

Now your users can get more information on their patients' medications. The Patient Medication Manager Lightning component now includes the medication category and branded alternative for generic medications.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

Why: The Medication object has two new fields:

- Medication Category indicates whether a medication is a generic medication, branded medication, therapeutic moiety, or innovator product.
- Brand Name Alternative shows the branded alternative for a generic medication.

How: Edit a person account's Lightning record page, and select the **Patient Medication Manager** component. Your users can now see the new fields.

Get Up and Running Quickly by Using the Guided Setup

Configure Medication Review and Medication Management 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 have to complete to set up your org. 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 and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available with the Health Cloud Medication Management add-on license.

How: To turn on Medication Review and Medication Management, go to the Medication Management and Medication Review Settings page in Setup. To see the guided setup instructions, acknowledge the terms of use, and then enable both **Medication Review** and **Medication Management**.

Review Prior Authorization Requests with Utilization Management

Optimize cost of care, improve health outcomes, and manage your authorization requests more efficiently with the new prior authorization review processes. The OmniScript processes reduce decision time by gathering information about benefits coverage and providers' participation in payer networks, all in one place.

Health Cloud's Utilization Management ensures ease of access to information and smoother collaboration between the payers, providers, and members handling prior authorization requests. The new Utilization Management for Payers app and predefined OmniScripts make it easy to manage eligibility checks, document uploads, perform clinical reviews, and more.

📝 Note: The OmniScript processes are available only in English.

IN THIS SECTION:

Simplify and Streamline Prior Authorization Request Reviews with the Utilization Management for Payers App

Provide your users a comprehensive view of prior authorization requests that are most important to them by enabling the Utilization Management for Payers App.

Enhance Operational Efficiencies Using the Guided Process Workflows for Prior Authorization

Empower your users to easily handle the complex prior authorization process with a predefined suite of OmniStudio components that combine to provide a smooth, guided user interaction.

Facilitate Effortless Submission of Prior Authorization Requests

Help intake specialists create and submit prior authorization requests with reduced administrative delays and procedural hassles. The Prior Authorization Intake process provides a centralized workflow for adding request details, and checking for eligibility, authorization requirements, and provider participation in payer networks.

Thoroughly Evaluate Requests By Conducting Effective Admin Reviews

Help your admin reviewers evaluate prior authorization requests quickly and efficiently, with capabilities to upload requested clinical documents, and add notes to capture their observations. The admin reviewer can also override the documentation status of the request and submit the request for clinical review.

Promote Optimal Health Outcomes by Performing In-Depth Nurse Reviews of a Request

Enable nurses to perform effective clinical reviews of prior authorization requests to ensure healthcare services are compliant, medical resources are appropriately used, and care is delivered with quality and cost efficiency.

Arrive at an Accurate Clinical Determination of Requests By Conducting Comprehensive Medical Director Reviews

Help your medical directors make informed, final decisions on prior authorization requests by analyzing the observations of previous reviewers against services, diagnosis, clinical documents, and evidence-based medical guidelines.

Promote Transparency and Open Communication By Scheduling Peer-to-Peer Reviews

Help your nurse check the availability of the medical director and requesting provider to schedule a peer-to-peer review meeting either before or after a request is denied. These open discussions help to align both parties on a decision if there are varying opinions.

Get Aligned on Clinical Decisions By Conducting Prompt Peer-to-Peer Review Meetings

Conduct timely peer-to-peer discussions to allow medical directors and requesting providers to discuss the actual or potential reason for denial of a prior authorization request and resolve conflicting opinions.

Expedite Reviews of Prior Authorization Requests With Business Rules and Logic

Achieve automatic rule-based validation, reduce administrative errors, and cut down on repetitive tasks by activating rules for member eligibility check, document checklist, and auto approval of prior authorization requests.

Address your Business' Unique Needs and Challenges by Customizing Prior Authorization Process Workflows and Rules

Customize the predefined OmniStudio components and business workflow rules for prior authorizations to offer an updated, guided interaction and a simplified, time-saving solution to your users.

Improve Service-Level Agreement Compliance of Prior-Authorization Requests

Deliver timely care with predictions about the likelihood of prior authorization requests breaching service-level agreements (SLA). Identify top factors that contribute to review delays. Use the predictions to reprioritize workflows within the time remaining for the SLA-breach to improve compliance and avoid punitive actions caused by breaching the legally defined SLAs.

Speed Up Configurations Using the Guided Setup for Utilization Management

Configure Utilization Management with efficiency by following simple, clear steps for all the necessary tasks—such as prerequisite checks, initial and process setups, and any additional configurations—all from one place. 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.

Provide Site User Access to Utilization Management

Enable your site users to easily create and submit prior authorization requests using a configurable flow powered by Omnistudio.

Get Real-Time Data for Better Decision Making With Custom Reports

Set up a custom report type and a custom report so that your users can view and analyze data related to their prior authorization requests.

Simplify and Streamline Prior Authorization Request Reviews with the Utilization Management for Payers App

Provide your users a comprehensive view of prior authorization requests that are most important to them by enabling the Utilization Management for Payers App.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management permission set.

Why: By showing all open cases, the app helps your users to easily identify and act on high priority or urgent requests. The app's home page provides a unified snapshot to help your users start and plan their day.

How: To turn on the app, go to the Utilization Management Settings page in Setup, and then enable **Utilization Management for Payers**.

SEE ALSO:

Salesforce Help: Enable the Utilization Management for Payers App

Salesforce Help: Utilization Management for Payers App

Enhance Operational Efficiencies Using the Guided Process Workflows for Prior Authorization

Empower your users to easily handle the complex prior authorization process with a predefined suite of OmniStudio components that combine to provide a smooth, guided user interaction.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

Why: The highly refined and solid technological workflows help your users to provide optimal medical care that's delivered at the necessary time and manage high-cost care.

How: Add picklist values named **Intake**, **Admin Review**, **Nurse Review**, **MD Review**, and **Determination** to the Status picklist on the Case object.

The predefined OmniStudio components are ready to use, however, we recommend using a cloned version of the OmniScripts and FlexCards that launch these OmniScripts. Simply clone each OmniScript and FlexCard, retain the settings, save with a different name, and activate the cloned version. Go to each cloned FlexCard and relink it to the corresponding cloned OmniScript. Cloning ensures that you don't face any process disruptions when predefined OmniScripts are updated during automatic upgrades.

Clone of FlexCard	Clone of OmniScript
HealthCloudUMPAFlowLaunch	HealthCloudUM/PriorAuthIntake
HealthCloudUMAdminFlowLaunch	HealthCloudUM/AdminReview
HealthCloudUMNurseFlowLaunch	HealthCloudUM/UMNurse
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/MedicalDirectorReview
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PScheduling
HealthCloudUMAuthReviewsLaunch	HealthCloudUM/P2PReview

SEE ALSO:

Salesforce Help: Manage Prior Authorization Requests

Salesforce Help: Prior Authorization Process Setup

Salesforce Help: Understand OmniStudio Components

Facilitate Effortless Submission of Prior Authorization Requests

Help intake specialists create and submit prior authorization requests with reduced administrative delays and procedural hassles. The Prior Authorization Intake process provides a centralized workflow for adding request details, and checking for eligibility, authorization requirements, and provider participation in payer networks.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

How: Edit the homepage of the Utilization Management for Payers app and add a FlexCard named **HealthCloudUMPAFlowLaunch**.

Your intake coordinator can now see the **Add Authorization Request Details** action button that launches the HealthCloudUM/PriorAuthIntake OmniScript process.

SEE ALSO:

Salesforce Help: Manage Prior Authorization Requests

Salesforce Help: Prior Authorization Process Setup

Salesforce Help: Understand OmniStudio Components

Thoroughly Evaluate Requests By Conducting Effective Admin Reviews

Help your admin reviewers evaluate prior authorization requests quickly and efficiently, with capabilities to upload requested clinical documents, and add notes to capture their observations. The admin reviewer can also override the documentation status of the request and submit the request for clinical review.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

How: Edit the Case record page and add a FlexCard named **HealthCloudUMAdminFlowLaunch**. In the Component Visibility, create a filter with Filter Type = Record Field. Set criteria to Status Equal Admin Review.

Your admin reviewer can now see the **Start Admin Review** action button that launches the HealthCloudUM/AdminReview OmniScript process.

SEE ALSO:

Salesforce Help: Manage Prior Authorization Requests

Salesforce Help: Prior Authorization Process Setup

Salesforce Help: Understand OmniStudio Components

Promote Optimal Health Outcomes by Performing In-Depth Nurse Reviews of a Request

Enable nurses to perform effective clinical reviews of prior authorization requests to ensure healthcare services are compliant, medical resources are appropriately used, and care is delivered with quality and cost efficiency.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

Why: Your nurse can either approve the request or refer it for further review by the Medical Director. Nurses facilitate the authorization and coordination of requests in adherence with the defined network of providers, clinical guidelines, and your organization's approval criteria.

How: Edit the Case record page and add a FlexCard named **HealthCloudUMNurseFlowLaunch**. In the Component Visibility, create a filter with Filter Type = Record Field. Set criteria to Status Equal Nurse Review.

Your nurse can now see the **Start Utilization Management Nurse Review** action button that launches the HealthCloudUM/UMNurse OmniScript process.

SEE ALSO:

    Salesforce Help: Manage Prior Authorization Requests

    Salesforce Help: Prior Authorization Process Setup

    Salesforce Help: Understand OmniStudio Components

Arrive at an Accurate Clinical Determination of Requests By Conducting Comprehensive Medical Director Reviews

Help your medical directors make informed, final decisions on prior authorization requests by analyzing the observations of previous reviewers against services, diagnosis, clinical documents, and evidence-based medical guidelines.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

Why: With a 360-degree view of the prior authorization request, your medical directors can perform an extensive clinical review, ensure quality parameters are met, and have final say on approval or denial.

How: Edit the Case record page and add a FlexCard named **HealthCloudUMAuthReviewsLaunch**. No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus doesn't equal Peer to Peer Review Scheduled.

Your medical director can now see the **Start Medical Director Review** action button that launches the HealthCloudUM/MedicalDirectorReview OmniScript process.

SEE ALSO:

    Salesforce Help: Manage Prior Authorization Requests

    Salesforce Help: Prior Authorization Process Setup

    Salesforce Help: Understand OmniStudio Components

Promote Transparency and Open Communication By Scheduling Peer-to-Peer Reviews

Help your nurse check the availability of the medical director and requesting provider to schedule a peer-to-peer review meeting either before or after a request is denied. These open discussions help to align both parties on a decision if there are varying opinions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets and the Salesforce Scheduler add-on.

How: Edit the Case record page and add a FlexCard named **HealthCloudUMAuthReviewsLaunch**. No action is required to set the visibility rules as they're predefined based on Case Status equals Nurse Review and Substatus equals Schedule Peer to Peer Review.

Your nurse can now see the **Schedule Peer-to-Peer Review** action button that launches the HealthCloudUM/P2PScheduling OmniScript process.

SEE ALSO:

    Salesforce Help: Manage Prior Authorization Requests

    Salesforce Help: Prior Authorization Process Setup

    Salesforce Help: Understand OmniStudio Components

Get Aligned on Clinical Decisions By Conducting Prompt Peer-to-Peer Review Meetings

Conduct timely peer-to-peer discussions to allow medical directors and requesting providers to discuss the actual or potential reason for denial of a prior authorization request and resolve conflicting opinions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio User, and RuleEngine Runtime permission sets.

Why: The peer-to-peer review meeting helps your medical directors to clarify clinical information, explain review outcome decisions, and direct the requesting provider towards appropriate care delivery, while avoiding lengthy dispute and appeal processes.

How: Edit the Case record page and add a FlexCard named **HealthCloudUMAuthReviewsLaunch**. No action is required to set the visibility rules as they're predefined based on Case Status equals MD Review and Substatus equals Peer to Peer Review Scheduled.

Your medical director can now see the **Start Peer-to-Peer Review** action button that launches the HealthCloudUM/P2PReview OmniScript process.

SEE ALSO:

    Salesforce Help: Manage Prior Authorization Requests

    Salesforce Help: Prior Authorization Process Setup

    Salesforce Help: Understand OmniStudio Components

Expedite Reviews of Prior Authorization Requests With Business Rules and Logic

Achieve automatic rule-based validation, reduce administrative errors, and cut down on repetitive tasks by activating rules for member eligibility check, document checklist, and auto approval of prior authorization requests.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio Admin, OmniStudio User, and RuleEngine Runtime, and RuleEngine Designer permission sets.

Why: Use predefined expression set templates and define decision matrices to speed up and streamline approval processes, simplify complex lookups, and automate business decisions in your prior authorization request workflows.

How: Define and activate decision matrices named **HealthCloudUM_DocsChecklist**, **HealthCloudUM_CardiologyCodes**, **HealthCloudUM_ServiceCodes_List_A,** and **HealthCloudUM_ValidRegions** with the necessary input and output columns.

Clone these predefined expression set templates: **HealthCloudUM_AutoApproval**, **HealthCloudUM_DocsChecklist**, and **HealthCloudUM_NeedAssessment**. Save them as expression sets with the same name and then activate them.

Address your Business' Unique Needs and Challenges by Customizing Prior Authorization Process Workflows and Rules

Customize the predefined OmniStudio components and business workflow rules for prior authorizations to offer an updated, guided interaction and a simplified, time-saving solution to your users.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, OmniStudio Admin, OmniStudio User, and RuleEngine Runtime, and RuleEngine Designer permission sets.

How: Define and activate custom decision matrices and expression sets to meet your business needs.

Clone the predefined OmniScripts and the related Integration Procedures, or Data Raptors and use a different name:

- HealthCloudUM/PriorAuthIntake
- HealthCloudUM/AdminReview
- HealthCloudUM/UMNurse
- HealthCloudUM/MedicalDirectorReview
- HealthCloudUM/P2PScheduling
- HealthCloudUM/P2PReview

Customize the cloned OmniScripts to meet your needs and also use the custom expression sets that you set up. Then associate the components and activate the cloned OmniScripts.

Clone the predefined FlexCards that are used to launch the OmniScripts and use a different name. Go to each cloned FlexCard and relink it to the corresponding cloned OmniScript. Then, add the cloned FlexCards to the Case Lighning record page and set the visibility rules.

Improve Service-Level Agreement Compliance of Prior-Authorization Requests
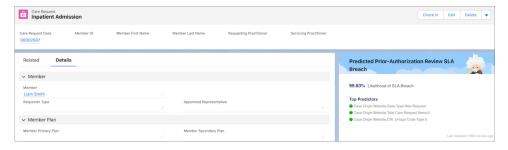
Deliver timely care with predictions about the likelihood of prior authorization requests breaching service-level agreements (SLA). Identify top factors that contribute to review delays. Use the predictions to reprioritize workflows within the time remaining for the SLA-breach to improve compliance and avoid punitive actions caused by breaching the legally defined SLAs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: The Prior-Authorization Review SLA Breach Likelihood template is available to users with the CRM Analytics for Healthcare license.

How: Go to CRM Analytics Studio, and then create your app by using the Prior-Authorization Review SLA Breach Likelihood template.

The Prior-Authorization Review SLA Breach Prediction dashboard shows the likelihood of a care request's prior-authorization review breaching the service-level agreement.

SEE ALSO:

   Salesforce Help: Prior-Authorization Review SLA Breach Predictions

   Salesforce Help: Prior-Authorization Review SLA Breach Prediction Dashboard and Story

Speed Up Configurations Using the Guided Setup for Utilization Management

Configure Utilization Management with efficiency by following simple, clear steps for all the necessary tasks—such as prerequisite checks, initial and process setups, and any additional configurations—all from one place. 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 and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management permission set.

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

Provide Site User Access to Utilization Management

Enable your site users to easily create and submit prior authorization requests using a configurable flow powered by Omnistudio.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: Site users need these permission sets and permission set licenses to access Utilization Management features:

* Utilization Management for Experience Cloud Sites permission set
* Rule Engine Runtime permission set
* OmniStudio User permission set
* OmniStudio Runtime for Communities permission set license
* Health Cloud for Experience Cloud Sites permission set license

SEE ALSO:

   Salesforce Help: Manage Prior Authorization Requests

   Salesforce Help: Prior Authorization Process Setup

   Salesforce Help: Understand OmniStudio Components

   Salesforce Help: Experience Cloud Site for Utilization Management

Get Real-Time Data for Better Decision Making With Custom Reports

Set up a custom report type and a custom report so that your users can view and analyze data related to their prior authorization requests.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud where person accounts are enabled.

Who: This feature is available to users who have the Health Cloud Utilization Management, Create and Customize Reports, and Manage Custom Report Types permission sets.

How: When setting up the custom report type in Setup, we recommend using Case as the primary object, and Care Request and Care Request Extension as the child objects.

SEE ALSO:

Salesforce Help: Manage Prior Authorization Requests

Salesforce Help: Prior Authorization Process Setup

Salesforce Help: Understand OmniStudio Components

Salesforce Help: Create Custom Reports for Utilization Management

Unified Health Scoring Enhancements

Unified Health Scoring now gives your users greater visibility into interventions with their patients or members.

IN THIS SECTION:

View History of Actions on the Enhanced Timeline Component

The Health Score Action Log object is now compatible with the Timeline component. Configure the Timeline component with this object to give your users a chronological view of their interventions with patients or members.

Get Started with Unified Health Scoring Faster by Using the Unified Health Scoring Data Kit

You can now start using Unified Health Scoring faster than ever before with the new Unified Health Scoring data kit. This data kit contains a collection of carefully selected data streams for key Health Cloud objects, their corresponding data model objects in Customer Data Platform (CDP), and their mappings. The Unified Health Scoring data kit adds these data streams, data model objects, and mappings to your org in a single procedure.

View History of Actions on the Enhanced Timeline Component

The Health Score Action Log object is now compatible with the Timeline component. Configure the Timeline component with this object to give your users a chronological view of their interventions with patients or members.

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: Configuring a page with both the Timeline component and the Score Details for Unified Health Scoring component gives your users greater insight into how their interventions affect patients or members.

How: Go to the Timeline page in Setup and create a new timeline configuration with Health Score Action Log as the related object. Then, on the page where you want the action history timeline, use the Lightning App Builder to place the Timeline component, and select the timeline you created.

SEE ALSO:

Salesforce Help: Provide Holistic Patient Care with Enhanced Timeline

Get Started with Unified Health Scoring Faster by Using the Unified Health Scoring Data Kit

You can now start using Unified Health Scoring faster than ever before with the new Unified Health Scoring data kit. This data kit contains a collection of carefully selected data streams for key Health Cloud objects, their corresponding data model objects in Customer Data Platform (CDP), and their mappings. The Unified Health Scoring data kit adds these data streams, data model objects, and mappings to your org in a single procedure.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Salesforce provisioned with the Health Cloud, Unified Health Scoring, and Salesforce Customer Data Platform licenses.

How: In CDP Setup, go to the Salesforce CRM page and install the Salesforce CDP CRM Unified Health Scoring standard data bundle. Select **Install for All Users** and click **Install**.

SEE ALSO:

　　Salesforce Help: Set Up Data Streams and Data Model Objects with the Unified Health Scoring Data Kit

Care Coordination for Slack

Help your care coordinators stay up to date on the healthcare status of their patients using notifications from Slack. These notifications help care coordinators connect with patients at the right time, resulting in greater patient engagement and reduced healthcare costs. Your care coordinators can use dedicated Slack channels to get critical notifications for higher priority changes in their patients' health.

🚫 Important: The Care Coordination for Slack app only works with Health Cloud implementations that have the Health Cloud managed package installed. You also need to use the Care Plans feature in the managed package for the Slack app to work.

IN THIS SECTION:

Get Notifications for a Patient's Health Records

Patient engagement is an essential part of improving health outcomes and reducing healthcare costs. And a key factor that determines the level of patient engagement is the timeliness of patient outreach. The Care Coordination for Slack app notifies your care coordinators about changes in their patients' health records so that they can reach out at the right time.

Set Up Custom Notification Types for Other Health Cloud Objects

To notify your care coordinators about changes to other types of records, configure custom notifications. For instance, you could set up a notification for newly dispensed medications. Simply create a notification type, clone one of the provided notification flows, and make some minor changes.

Use Dedicated Slack Channels to Receive Critical Notifications

Make it easier for your care coordinators to track the most important changes without being overwhelmed by too many notifications by setting up a dedicated channel for critical notifications.

Get Notifications for a Patient's Health Records

Patient engagement is an essential part of improving health outcomes and reducing healthcare costs. And a key factor that determines the level of patient engagement is the timeliness of patient outreach. The Care Coordination for Slack app notifies your care coordinators about changes in their patients' health records so that they can reach out at the right time.

Where: This change applies to implementations of Slack that have the Care Coordination for Slack app installed and are connected to Salesforce orgs licensed with Health Cloud.

Why: Notifications are sent to care coordinators for updates to case records of type Care Plan. Notifications are also sent when new records are created in the Health Condition, Medication Statement, Allergy Intolerance, and Care Determinant objects. You can also create custom notifications, if needed.

How: In Setup, go to the Initial Slack Setup page, read through and accept the terms and conditions, and integrate Slack with your Salesforce org. Then, go to the Care Coordination for Slack Settings page and enable **Care Coordination for Slack**. After that, go to Flows, and clone and activate the autolaunch flow for each notification type. Lastly, install the Care Coordination for Slack app for your users in your Slack implementation.

SEE ALSO:

> *Salesforce Help*: Enable Care Coordination for Slack
>
> *Salesforce Help*: Clone and Activate Flows for the Care Coordination for Slack App

Set Up Custom Notification Types for Other Health Cloud Objects

To notify your care coordinators about changes to other types of records, configure custom notifications. For instance, you could set up a notification for newly dispensed medications. Simply create a notification type, clone one of the provided notification flows, and make some minor changes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited Editions where Health Cloud and Slack for Salesforce are enabled.

How: In Setup, go to Custom Notifications and create a notification type. Then go to Flows, clone one of the existing autolaunch flows, and update the triggering record and trigger action.

SEE ALSO:

> *Salesforce Help*: Custom Notifications in Care Coordination for Slack

Use Dedicated Slack Channels to Receive Critical Notifications

Make it easier for your care coordinators to track the most important changes without being overwhelmed by too many notifications by setting up a dedicated channel for critical notifications.

Where: This change applies to Lightning Experience in Enterprise and Unlimited Editions where Health Cloud and Slack for Salesforce are enabled.

How: In Setup, go to the Care Coordination for Slack Settings page and click **Create Channel**.

SEE ALSO:

> *Salesforce Help*: Create Critical Notifications Channels

Refresh the Patient Card

You can now refresh the patient card component to show the latest patient data. A useful timestamp lets you know that you're viewing the latest information.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: This feature is available to all users who are assigned the Health Cloud license.

How: To manually refresh the Patient Card, click the [c] button. To automate the refresh, use a trigger or flow with the provided HC Platform Event.

SEE ALSO:

   Salesforce Help: Manually Refresh the Patient Card

   Salesforce Help: Automate Refreshing the Patient Card with a Platform Event

Objects in the FHIR R4-Aligned Clinical Data Model have Updated Sharing Options

You now have more options when deciding how records created in the FHIR R4-aligned 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 in the FHIR R4-aligned Clinical data model objects that reference patient records as their parent are no longer strictly shared with users that have access to those patient records. Instead, you can explicitly choose whether or not the sharing settings for those objects are controlled by their parent objects. The default sharing setting is still set to Controlled by Parent.

These objects 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

How: In Setup, go to the Sharing Settings page. Click **Edit** and set the default internal access and default external access to **Controlled by Parent**, **Private**, **Public Read Only**, or **Public Read/Write**.

Replacing the EHR Data Model with the Clinical Data Model

We've extended the timeline for when the EHR data model is replaced with the Clinical data model. Starting with the Spring '23 release, new customers can't create records for 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. Review 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.

> **Note:** Customers who have been using Health Cloud prior to the Spring '23 release aren't impacted by this change. You can still create records in the EHR data model while you begin your migration to the FHIR R4-alinged Clinical data model.

SEE ALSO:

Health Cloud Developer Guide: Mapping the EHR Data Model to the Clinical Data Model

Create a Health Cloud Pre-Release Trial Org

Sign up for a Health Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Who: This pre-release trial org is great for admins, architects, and developers. You don't need any special permissions to sign up for an org.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/signup/health-cloud-prerelease-trial/. After your org is created, you'll receive an email with login details.

> **Note:**
> - Winter '23 pre-release trial orgs are available now until October 15, 2022.
> - Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects.

Where: This change applies to Enterprise and Unlimited editions.

Medication Management

Store information about the medication therapy review conducted for a patient
Use the new `MedicationTherapyReview` object.

Associate a medication therapy review with a medication statement
Use the new `MedicationTherapyStatementReview` object.

Associate a clinical detected issue with the medication therapy statement review
Use the new `MedicationTherapyStatementReviewIssue` object.

Store the category of a medication
Use the new `MedicationCategory` field on the `Medication` object.

Store the branded alternative for a generic medication
Use the new `BrandNameAlternative` field on the `Medication` object.

Store the date that the patient opted out of the Medication Therapy Management care program
Use the new `OptOutPeriodStartDateTime` field on the `CareProgramEnrollee` object.

Store the date on which the patient's opt-out from the Medication Therapy Management care program ends
Use the new `OptOutPeriodEndDateTime` field on the `CareProgramEnrollee` object.

Specify the reason why the patient opted out of the Medication Therapy Management care program
Use the new `OptOutReasonType` field on the `CareProgramEnrollee` object.

Indicate that the patient was at a long-term facility during outreach or enrollment to the Medication Therapy Management care program
Use the new `IsPatientInLtrmCareFacility` field on the `CareProgramEnrollee` object.

Assign tasks to patients as part of a medication therapy review
Use the new *CarePlan* and *CarePlanActivity* objects.

Create issue-specific templates for tasks that are commonly assigned as part of a medication therapy review
Use the new *CarePlanTemplate* object.

Associate a version of an action plan template with its related care plan template
Use the new *ActionPlanTemplateAssignment* object.

Clinical Data Model

Specify a person's speaking proficiency level for a language
Use the new *SpeakingProficiencyLevel* field on the *PersonLanguage* object.

Specify a person's writing proficiency level for a language
Use the new *WritingProficiencyLevel* field on the *PersonLanguage* object.

Unified Health Scoring

Configure visibility rules for Unified Health Scoring dynamic actions based on an account's related records
Use the new *ActionVisibilityId* field on the *Account* object.

Configure visibility rules for Unified Health Scoring dynamic actions based on a contact's related records
Use the new *ActionVisibilityId* field on the *Contact* object.

Advanced Therapy Management

Represent a group of service appointments
Use the new *ServiceAppointmentGroup* object.

Represent the relationship between service territories based on work types performed
Use the new *ServiceTerritoryRelationship* object.

Represent information about a procedure or process that's part of a program, such as a care program in Health Cloud
Use the new *WorkProcedure* object.

Represent information about the work type that's a part of a work procedure
Use the new *WorkProcedureStep* object.

Represent additional information about a work type
Use the new *WorkTypeExtension* object.

Indicate if slots have been published for a particular service territory work type
Use the new *IsSlotPublished* field on the *Service Territory Work Type* object.

Specify the parent service appointment group record for a service appointment
Use the new *ParentRecordId* field on the *Service Appointment* object.

Engagement

Connect an engagement attendee to either an engagement interaction or a voice call
Use the updated *EngagementId* field on the *EngagementAttendee* object. The field is now required.

Specify either the external or the internal attendee of an engagement interaction
Use the updated *ExternalAttendeeId* or *InternalAttendeeId* field on the *EngagementAttendee* object. You must specify the value of at least one of these fields.

Indicate whether an initiating attendee is authenticated
Use the `IsAuthenticated` field on the `EngagementAttendee` object.

Indicate whether an initiating attendee is verified
Use the `IsVerified` field on the `EngagementAttendee` object.

Indicate the role of an engagement attendee
Use the `Role` field on the `EngagementAttendee` object.

Specify the time an engagement attendee is verified for an engagement interaction
Use the `VerificationTime` field on the `EngagementAttendee` object.

Set the time an engagement attendee was verified
Use the updated `AttendeeVerificationTime` field on the `EngagementInteraction` object.

Configure custom channels of communication between a customer and a CSR or CCA
Use the updated `CommunicationChannel` field on the `EngagementInteraction` object. The field is now required

BEHAVIOR CHANGE: Auto-calculate the duration of an engagement interaction by updating the end time
Use the `Duration` field on the `EngagementInteraction` object. The field is now Read-only.

Store the reason for an engagement interaction
Use the `Reason` field on the `EngagementInteraction` object.

Configure custom values to indicate how an initiating attendee feels about an engagement interaction
Use the updated `Sentiment` field on the `EngagementInteraction` object.

Configure custom values to indicate the status of an engagement interaction
Use the updated `Status` field on the `EngagementInteraction` object.

Configure custom values to indicate the type of an engagement interaction
Use the updated `Type` field on the `EngagementInteraction` object

Connect an engagement topic to either an engagement interaction or a voice call
Use the updated `EngagementId` field on the `EngagementTopic` object. The field is now required.

Summarize an engagement interaction
Use the `InteractionSummary` field on the `EngagementTopic` object.

Configure reasons for the failure of an identity verification process
Use the `ProcessFailureReason` field on the `EngagementTopic` object.

Configure the status values of a process run during an engagement interaction
Use the `ProcessStatus` field on the `EngagementTopic` object.

Utilization Management

Store the substatus of a case related to a care request
Use the new `CaseSubStatus` field on the `CareRequestExtension` object.

Store the content document that's attached to the reviewer note

Use the new `ContentDocumentId` field on the `CareRequestReviewer` object.

SEE ALSO:

Developer Guide: Medication Management Data Model

Developer Guide: Clinical Data Model

Developer Guide: Unified Health Scoring Data Model

Developer Guide: Advanced Therapy Management Data Model

Developer Guide: Engagement Interaction Data Model

Developer Guide: Utilization Management Data Model

Salesforce Healthcare API

Health Cloud includes new Healthcare API that can interact with any system that utilizes Fast Healthcare Interoperability Resources (FHIR) API.

Clinical Summary API

Retrieve a patient's condition records by using filters

Make a GET request to the new `api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Condition` resource.

Required request parameters: `patient`

New response body: Condition Read Response

Create a patient's condition record

Make a POST request to the new `api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Condition` resource.

New request body: Condition Create Request

New response body: Condition Create Response

Fetch a patient's condition details using the record ID

Make a GET request to the new `api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Condition` resource.

Required request parameters: `id`

New response body: Condition Read Response

Create or update a patient's condition record using the record ID

Make a PUT request to the new `api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Condition` resource.

Required request parameters: `id`

New request body: Condition Update Request

New response body: Condition Update Response

Fetch a patient's procedure records

Make a GET request to the new `api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Procedure` resource.

New request parameter: `patient`

New response body: Procedure Read Response

Create a patient's procedure record
Make a POST request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Procedure` resource.

New request body: Procedure Create Request

New response body: Procedure Create Response

Fetch a patient's procedure record using the record ID
Make a GET request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Procedure` resource.

New parameter request: `id`

New response body: Procedure Read Request

Create or update a patient's procedure record using the record ID
Make a PUT request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/Procedure` resource.

New request parameter: `id`

New request body: Procedure Update Request

New response body: Procedure Update Response

Retrieve a patient's allergy intolerance records
Make a GET request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/AllergyIntolerance` resource.

New request parameter: `patient`

New response body: AllergyIntolerance Read Response

Create a patient's allergy intolerance record
Make a POST request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/AllergyIntolerance` resource.

New request body: AllergyIntolerance Create Request

New response body: AllergyIntolerance Create Response

Retrieve a patient's allergy intolerance record using the record ID
Make a GET request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/AllergyIntolerance` resource.

New request parameter: `id`

New response body: AllergyIntolerance Read Response

Create or update a patient's allergy intolerance record using the record ID
Make a PUT request to the new
`api.healthcloud.salesforce.com/clinical-summary/fhir-r4/v1/AllergyIntolerance` resource.

New request parameter: `id`

New request body: AllergyIntolerance Update Request

New response body: AllergyIntolerance Update Response

Medication API

Create a patient's medication record

Make a POST request to the new `api.healthcloud.salesforce.com/medication/fhir-r4/v1/Medication` resource.

New request body: Medication Create Request

New response body: Medication Create Response

Retrieve a patient's medication details using the record ID

Make a GET request to the new `api.healthcloud.salesforce.com/medication/fhir-r4/v1/Medication` resource.

Required request parameters: `id`

New response body: Medication Read Response

Create or update a patient's medication record using the record ID

Make a PUT request to the new `api.healthcloud.salesforce.com/medication/fhir-r4/v1/Medication` resource.

Required request parameters: `id`

New request body: Medication Update Request

New response body: Medication Update Response

SEE ALSO:

Salesforce Healthcare API Developer Guide

New Invocable Action in Health Cloud

Do more with the new invocable action.

Where: This change applies to Enterprise and Unlimited editions.

Identity Verification

Store identity verification data for auditing and reporting

Use the *saveMemberVerificationSteps* action.

SEE ALSO:

Salesforce Help: Health Cloud Invocable Actions

Actions Developer Guide

Loyalty Management

Use templates to get a head start on designing everyday processes for your loyalty programs. Use a single Business API to run your processes. Put widgets on your website to drive enrollment and give members a quick view of their membership details. Recognize member achievement by assigning badges. Automatically merge and unmerge memberships. Get a simplified view of a member's promotion eligibility. Use field values instead of referenced object record IDs in APIs. Design flows that cancel accrual and redemption transactions. Use rules in loyalty program processes to create and update records, to add steps between existing steps, and to pick Loyalty Management field values as action inputs.

IN THIS SECTION:

Create Engaging Member Experiences by Using Widgets

Engage your members by embedding Member Engagement Widgets on external portals and websites. You can use these widgets right out of the box to enable loyalty program enrollment, to view member loyalty information, and to view and enroll members in promotions. You can easily configure the widgets based on your branding needs and also create widgets to drive differentiated member experiences. Member Engagement Widgets are powered by OmniStudio FlexCards and OmniOut.

Member Badges

Reward members for engaging with loyalty programs and celebrate member milestones by assigning members badges.

Loyalty Business APIs

Use Loyalty Business APIs to perform recurring, system-to-system, real-time, Loyalty-specific actions. Perform simple actions or configure complex accrual and redemption rules. Use Salesforce object IDs instead of entity names. Extend Business API templates for customizing APIs as per implementation requirements. Leverage scalable loyalty promotion processes for improved ease of use and performance. Use the Loyalty Business APIs to perform various transactional and nontransactional tasks.

Engage Members at Various Stages of Their Membership Journey

Get a head start on designing Marketing Cloud journeys that celebrate member milestones with template Marketing Cloud journeys. Loyalty Management provides template journeys to welcome new members, to celebrate members' birthday, and to inform members about the points accrued or redeemed for a purchase and about tier upgrades. Each journey comes with a unique set of contextual emails that you can send as is or customize based on your company's requirements.

Member Promotion Eligibility

Loyalty program managers can easily view the promotions that members are enrolled in, are not enrolled in, and are ineligible for on the Loyalty Program Member, Contact, and Account records.

Promotion Setup

Simplify and automate your repetitive jobs, such as appending sub processes within a process, changing member tiers, and adding or updating records. Check out the smart and efficient enhancements for the rule steps of a rule.

Merge Duplicate Member Records and Multiple Memberships

Merge duplicate loyalty program memberships or multiple memberships of members who want to maintain only one membership. Points and vouchers from merged memberships are transferred to the member's active membership. The active membership is also assigned the tier that's higher between the merged memberships' tier and the active membership's current tier. You can also unmerge memberships if you merged memberships by mistake or if members want to restore their merged memberships. The capability to merge memberships helps to automatically merge memberships on member requests and reduces the time and effort required by customer service reps to merge member data manually.

Give Partners Access to Program Engagement Details

Now give your loyalty program partners access to their partnership details, such as transaction journals, partner ledgers, partner currencies, joint promotions, and products, on your Experience Cloud site. Prepaid partners can track their prepaid packs too.

Alert Agents When Member Activities Require Action

Notify your agents whenever changes in a Loyalty Program Member record or a Transaction Journal record require agents to act. For example, if a member's address changes, you can alert your agents to offer the member promotions that are applicable to the new location. You can also alert agents if a voucher is redeemed from a location that's far from the member's current address. The alerts appear on Loyalty Program Member and the Transaction Journal records. You can create record alerts manually or automatically.

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.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

New Invocable Actions in Loyalty Management

Use the new 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.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

Create Engaging Member Experiences by Using Widgets

Engage your members by embedding Member Engagement Widgets on external portals and websites. You can use these widgets right out of the box to enable loyalty program enrollment, to view member loyalty information, and to view and enroll members in promotions. You can easily configure the widgets based on your branding needs and also create widgets to drive differentiated member experiences. Member Engagement Widgets are powered by OmniStudio FlexCards and OmniOut.

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: From Setup, in the Quick Find box, enter `OmniStudio`. Customize and configure the existing cards in the designer.

Member Profile Card

Join Promotion Card

Join Program Card

Member Badges

Reward members for engaging with loyalty programs and celebrate member milestones by assigning members badges.

IN THIS SECTION:

Design Badges to Recognize Member Engagement and Milestones

Do you want to show your appreciation to members for engaging with a loyalty program and for achieving program milestones? Reward the members with badges. Badges also help drive other member experiences, such as crediting points, providing benefits, and issuing vouchers. Your loyalty program managers can create the badges, for example, to reward the most active members of a loyalty program's community page. You can design the badges such that they can be assigned for a period or until a specific date, such as three months or until December 31. You can also use images that represent the company and the loyalty program's brand to create the badge. The images can be shown on your loyalty program's site.

Decide When Badges are Assigned to Members
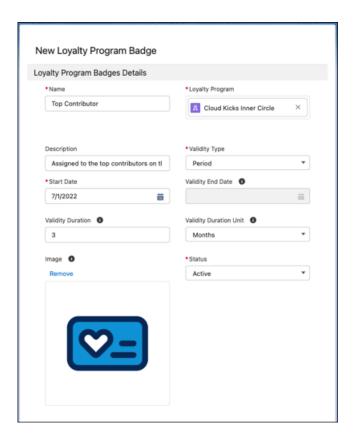
Use the Assign Badge to Member action in rules of loyalty program processes to assign badges to members. In the rule, you can define the conditions that determine when to assign badges to members. Use the Check Member Badge Assignment action in relevant rules to verify if a member is already assigned a badge.

Design Badges to Recognize Member Engagement and Milestones

Do you want to show your appreciation to members for engaging with a loyalty program and for achieving program milestones? Reward the members with badges. Badges also help drive other member experiences, such as crediting points, providing benefits, and issuing vouchers. Your loyalty program managers can create the badges, for example, to reward the most active members of a loyalty program's community page. You can design the badges such that they can be assigned for a period or until a specific date, such as three months or until December 31. You can also use images that represent the company and the loyalty program's brand to create the badge. The images can be shown on your loyalty program's site.

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: Go to the Loyalty Experiences tab of a Loyalty Program record. On the Loyalty Program Badges related list, click **New**. Design and save the badge.

Decide When Badges are Assigned to Members
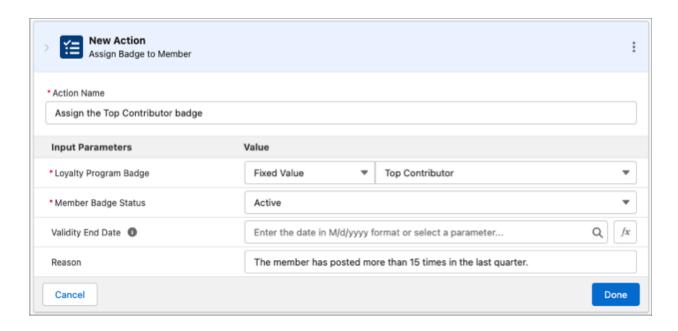
Use the Assign Badge to Member action in rules of loyalty program processes to assign badges to members. In the rule, you can define the conditions that determine when to assign badges to members. Use the Check Member Badge Assignment action in relevant rules to verify if a member is already assigned a badge.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

Why: For example, loyalty program managers want to assign a badge to members who post more than 15 times per quarter on a loyalty program's community. Each post is tracked as a Transaction Journal record of the type Community Engagement. A condition in the rule checks whether 15 or more Community Engagement type transaction journals have been created for the member in the last three months. The Assign Badge to Member action is added as a child step of the action. The action assigns the badge to the member if the condition is evaluated as True for the member. In another scenario, a B2B loyalty program wants to reward members who are assigned the Sales Champion badge with 1,000 points. In a rule, the Check Member Badge Assignment action checks if members are assigned the Sales Champion badge. If the Check Member Badge Assignment action verifies that the member is assigned the Sales Champion badge, then 1,000 points are credited to the member.

How: On Rules Builder, click ⊕ . Select **Add Action**. If you want to assign a badge to a member, select the **Assign Badge to Member** action. If you want to check if a badge is already assigned to a member, select the **Check Member Badge Assignment** action.

Salesforce Help: Assign Badges to Members (can be outdated or unavailable during release preview)

Loyalty Business APIs

Use Loyalty Business APIs to perform recurring, system-to-system, real-time, Loyalty-specific actions. Perform simple actions or configure complex accrual and redemption rules. Use Salesforce object IDs instead of entity names. Extend Business API templates for customizing APIs as per implementation requirements. Leverage scalable loyalty promotion processes for improved ease of use and performance. Use the Loyalty Business APIs to perform various transactional and nontransactional tasks.

IN THIS SECTION:

Customize Your Loyalty Program Processes by Using Process Templates

Use the out-of-the-box Loyalty Program Process templates to perform recurring, customizable, and complex actions. Use business APIs to avoid using multiple URLs. You can customize process templates for process parameters and process rules. Currently 14 Loyalty Program Process Business APIs are available to perform various transactional and nontransactional tasks. Complex actions are supported by out-of-the-box templates that use APIs internally. For the simpler actions that don't require customization, you can use the APIs directly.

Integrate Loyalty Actions by Using Business APIs

For simpler actions that don't require customization, you can use the business APIs directly. We have four existing APIs and one new API that you can use to update voucher, redeem points, calculate points, and so on. Use the View Transaction History API to view the transaction history in the context of purchase, social activity, visits.

Use Name Values Instead of Salesforce Object IDs During API Execution

Now you can run new and existing APIs by specifying the names of objects or IDs. For example, to get the transaction journals for a product, you specified the product code. Now you can specify the unique product name and process the transactions. Specify name or ID of the foreign key field when you configure the payload.

Use the process templates to create a loyalty program process that has predefined parameters and rules. Review and customize the process as necessary, and then activate the process. Then configure the URL of the external website, review the payload, and then run the API.

Customize Your Loyalty Program Processes by Using Process Templates

Use the out-of-the-box Loyalty Program Process templates to perform recurring, customizable, and complex actions. Use business APIs to avoid using multiple URLs. You can customize process templates for process parameters and process rules. Currently 14 Loyalty Program Process Business APIs are available to perform various transactional and nontransactional tasks. Complex actions are supported by out-of-the-box templates that use APIs internally. For the simpler actions that don't require customization, you can use the APIs directly.

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:

When you create a loyalty program process from templates, you can select the relevant process template.

Integrate Loyalty Actions by Using Business APIs

For simpler actions that don't require customization, you can use the business APIs directly. We have four existing APIs and one new API that you can use to update voucher, redeem points, calculate points, and so on. Use the View Transaction History API to view the transaction history in the context of purchase, social activity, visits.

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.

Use Name Values Instead of Salesforce Object IDs During API Execution

Now you can run new and existing APIs by specifying the names of objects or IDs. For example, to get the transaction journals for a product, you specified the product code. Now you can specify the unique product name and process the transactions. Specify name or ID of the foreign key field when you configure the payload.

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: When creating a transaction journal by using the Create Transaction Journal API, specify the field for transaction journal either by name or ID: JournalTypeName can be **Accrual** or **Redemption** or the ID field, Salesforce JournalTypeId can be `01Vxx00000006evEAA`.

How to Run Loyalty Program Processes

Use the process templates to create a loyalty program process that has predefined parameters and rules. Review and customize the process as necessary, and then activate the process. Then configure the URL of the external website, review the payload, and then run the API.

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.
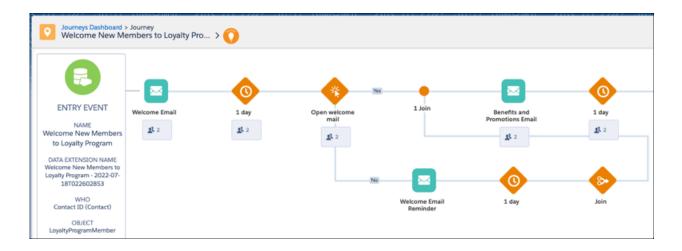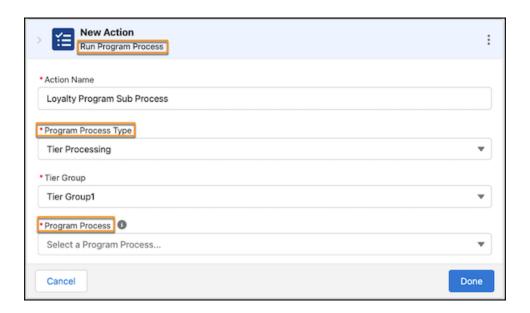
Why: Alternatively, the active loyalty program processes are available in the Flow Builder actions in the Loyalty category. You can create and activate the flow for the process.

Engage Members at Various Stages of Their Membership Journey

Get a head start on designing Marketing Cloud journeys that celebrate member milestones with template Marketing Cloud journeys. Loyalty Management provides template journeys to welcome new members, to celebrate members' birthday, and to inform members about the points accrued or redeemed for a purchase and about tier upgrades. Each journey comes with a unique set of contextual emails that you can send as is or customize based on your company's requirements.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management, Marketing Cloud Connect, and Marketing Cloud are enabled.

How: Use Marketing Cloud Connect and data extensions to bring data from your Loyalty Management app in to Marketing Cloud. Install the managed packages that contain the template journeys and the Loyalty Management content blocks. In Journey Builder, customize the journeys based on your requirements.

> *Salesforce Help*: Automate Member Notifications with Journey Builder in Marketing Cloud (can be outdated or unavailable during release preview)

Member Promotion Eligibility

Loyalty program managers can easily view the promotions that members are enrolled in, are not enrolled in, and are ineligible for on the Loyalty Program Member, Contact, and Account records.

IN THIS SECTION:

Save Time and Clicks with Simple View of Member's Eligible Promotions

When attending to member queries or reviewing member profiles, customer service reps and loyalty program managers can view members' enrolled promotions and promotions members are eligible to enroll in. The Promotion Eligibility component on Loyalty Program Member records lists the promotions that members have enrolled in, are eligible to enroll in, and are ineligible for. The component also provides easy access to a list that loyalty program managers and customer service reps can use to enroll members in promotions.

View a Member's Promotion Eligibility on Contact and Account Records

When interacting with members, loyalty program managers and customer service reps can now stay on the member's Contact or Account record and still view the member's promotion eligibility by using the Promotion Eligibility component. The Promotion Eligibility component is provided as a child component in the Loyalty Member Profile component and can be added to Account and Contact records.

Save Time and Clicks with Simple View of Member's Eligible Promotions

When attending to member queries or reviewing member profiles, customer service reps and loyalty program managers can view members' enrolled promotions and promotions members are eligible to enroll in. The Promotion Eligibility component on Loyalty Program Member records lists the promotions that members have enrolled in, are eligible to enroll in, and are ineligible for. The component also provides easy access to a list that loyalty program managers and customer service reps can use to enroll members in promotions.

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: Admins ensure that the component categorizes promotions based on whether the member is a part of the promotion's campaign or the Customer Data Platform segment. For example, a loyalty program manager wants to encourage a member who hasn't interacted

with the loyalty program for a while. The program manager checks the promotions that the member is eligible for and enrolls the member in the promotion.

How: Go to a Loyalty Program Member record and view the Promotion Eligibility component. To enroll the member for a promotion, click **View All Promotions**. Select the **Not Enrolled Promotions** list view. Click ⏷ next to the promotion that you want to enroll the member in. Select **Enroll**.

To allow the component to categorize promotions based on the member's segment or Customer Data Platform segment, from Setup, in the Quick Find box, enter `Loyalty`, and then select **Loyalty Management Settings**. Enable **Verify Member Customer Data Platform Segment for Transactions and Promotions**.

SEE ALSO:

Salesforce Help: View Promotions Categorized by Member's Eligibility (can be outdated or unavailable during release preview)

View a Member's Promotion Eligibility on Contact and Account Records

When interacting with members, loyalty program managers and customer service reps can now stay on the member's Contact or Account record and still view the member's promotion eligibility by using the Promotion Eligibility component. The Promotion Eligibility component is provided as a child component in the Loyalty Member Profile component and can be added to Account and Contact records.

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.
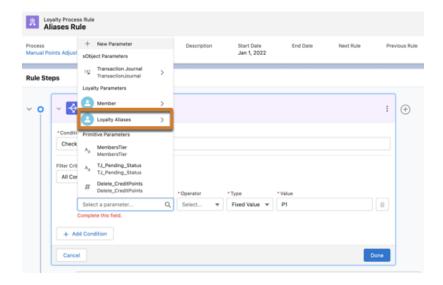
How: On a Contact or Account record, click **Setup** and select **Edit Page**. Drag the Loyalty Member Profile component on to the canvas. Select **Show promotion eligibility** and save the page.

SEE ALSO:

Salesforce Help: Show the Promotion Eligibility Component on Contact and Account Records (can be outdated or unavailable during release preview)

Promotion Setup

Simplify and automate your repetitive jobs, such as appending sub processes within a process, changing member tiers, and adding or updating records. Check out the smart and efficient enhancements for the rule steps of a rule.

IN THIS SECTION:

Use Loyalty Parameter Resources in Condition

When you define a rule, you find the newly added Loyalty Parameter resources in the Resources list in the formula of a condition: Member, Member Tiers, Member Currency, and Member Attributes. We provide these parameters right out of the box.

Define Dynamic Parameters for Loyalty Actions

When you define an action in the Promotion Setup rules for a loyalty program process, you can create process parameters to pass the input values either dynamically or by choosing inputs from a fixed set. Previously, you either entered a value for an input field or selected a parameter that contained the value.

Insert an Action Above or Between Actions and Conditions in a Rule

Now you can insert a condition or an action as a rule step before, after, or between actions or conditions. Previously, when defining a rule, you added an action only after another action or condition. And to insert an action between actions, you deleted the existing actions and then readded the actions and conditions in their logical sequence.

Cancel Accrual and Cancel Redemption Actions in Flow Builder

The cancelAccrual and cancelRedemption public APIs are now added as actions in Flow Builder. Loyalty Admin can use the Cancel Accrual Transaction and Cancel Redemption Transaction actions in a flow. The Cancel Accrual Transaction action reverts an accrual transaction. When you enter the Transaction Journal ID and Cancellation Reason as input, the action picks up all the ledgers from the transaction journal. The action then adds another transaction journal entry (debit ledger) of the Accrual Cancellation journal type that deducts points from the member's point balance. The Cancel Redemption Transaction action reverts a redemption transaction in a similar way.

Run Program Process Action in Flow Builder

Now a loyalty admin can run loyalty program processes in Flow Builder. Use the Run Program Process action in a flow to process transactional and nontransactional processes, such as processing transaction journals, crediting and debiting points, updating member details. For example, to determine how many points are credited to a member who joins a loyalty program, create the Credit Points process. Specify the parameters. Define a rule. Then run the Credit Points action in Flow Builder.

Run Sub Processes of a Loyalty Program Process Automatically

You can now run relevant transactional or nontransactional processes as sub processes of your loyalty program process. For example, a member's tier can change depending on the points that are credited to the points balance account. Earlier you had to run the credit points and change member tier processes every time. Instead, now you can run these processes automatically by setting the process as sub process of your primary process, loyalty program process, by adding an action, Run Program Process in the rule.

Create or Update Records Automatically

You can now create or update a record automatically from a loyalty process rule in Promotion Setup. For example, when you process member transactions, you want to create a member tier based on the number of accrued points. Or when you run loyalty program process for Updating Member Details, such as mobile phone number or email ID, you want to update the Contact record of the member. Now you can perform these tasks as one task. Define the action and include it with the Update Member Details process.

Change Member Tiers Automatically

Now loyalty program managers can automatically move a member from one tier to another by defining a loyalty program process.

Use Loyalty Program Process Aliases
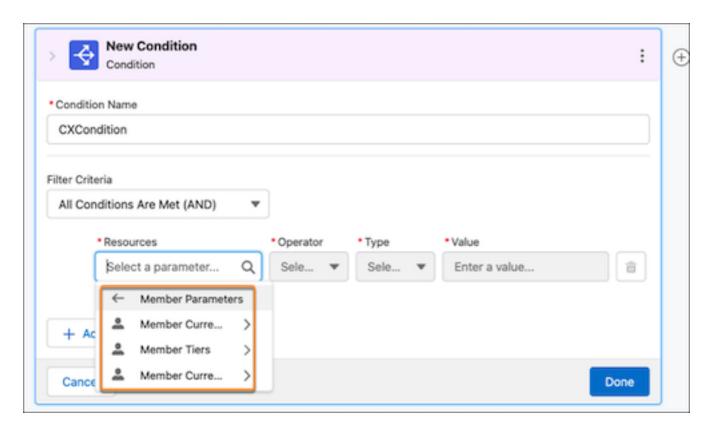
Use aliases to quickly and easily specify object fields as resources. You can also use aliases for loyalty objects and fields instead of providing the object-field relationships. To make loyalty aliases available as resources, define the formula in a rule condition.

Use Loyalty Parameter Resources in Condition

When you define a rule, you find the newly added Loyalty Parameter resources in the Resources list in the formula of a condition: Member, Member Tiers, Member Currency, and Member Attributes. We provide these parameters right out of the box.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

How:
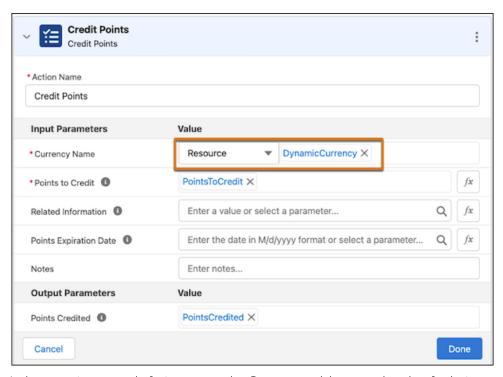
To access a rule's default loyalty parameter resources, in the rule condition, go to **Resources** > **Loyalty Parameters** > **Member Parameters**.

Define Dynamic Parameters for Loyalty Actions

When you define an action in the Promotion Setup rules for a loyalty program process, you can create process parameters to pass the input values either dynamically or by choosing inputs from a fixed set. Previously, you either entered a value for an input field or selected a parameter that contained the value.

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: In the loyalty program process rule, select a Loyalty Management object field to provide the value for the action's input parameter.
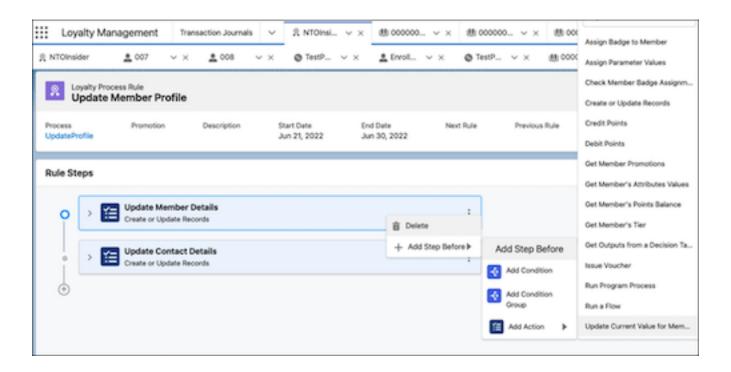
In the promotion setup rule, for input type, select **Resource**, and then enter the values for the input parameters of these actions:

- Credit Points action: Currency Name parameter
- Debit Points action: Currency Name parameter
- Get Member Points Balance action: Currency Name parameter
- Issue Voucher action: Voucher Definition Name parameter
- Get Member's Tier action: Tier Group parameter
- Update Current Value for Member Attribute action: Engagement Attribute parameter
- Get Member's Attributes Values action: Engagement Attribute parameter
- Assign Badge to Member action: Loyalty Program Badge parameter
- Check Member Badge Assignment: Loyalty Program Badge parameter

Insert an Action Above or Between Actions and Conditions in a Rule

Now you can insert a condition or an action as a rule step before, after, or between actions or conditions. Previously, when defining a rule, you added an action only after another action or condition. And to insert an action between actions, you deleted the existing actions and then readded the actions and conditions in their logical sequence.

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:
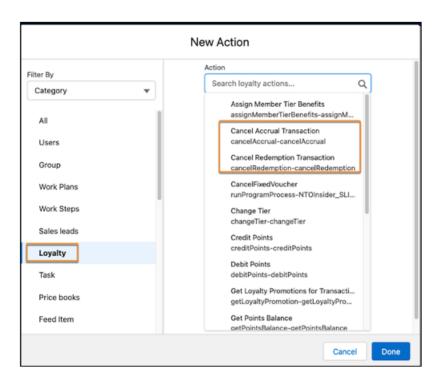
In the rule, go to the rule step where you want to insert an action or condition. Click the Show Menu icon to insert the action before a rule step.

Cancel Accrual and Cancel Redemption Actions in Flow Builder

The cancelAccrual and cancelRedemption public APIs are now added as actions in Flow Builder. Loyalty Admin can use the Cancel Accrual Transaction and Cancel Redemption Transaction actions in a flow. The Cancel Accrual Transaction action reverts an accrual transaction. When you enter the Transaction Journal ID and Cancellation Reason as input, the action picks up all the ledgers from the transaction journal. The action then adds another transaction journal entry (debit ledger) of the Accrual Cancellation journal type that deducts points from the member's point balance. The Cancel Redemption Transaction action reverts a redemption transaction in a similar way.

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:
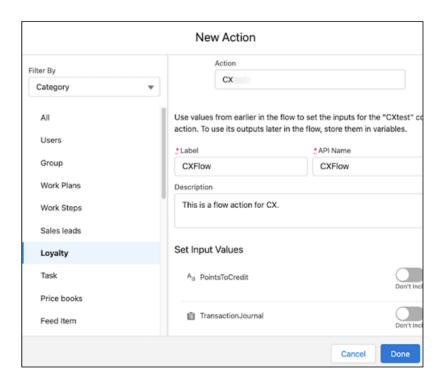
From Setup, in the Quick Find box, enter `Flows`, and then select Flows. Create a flow. While adding an action, select a Loyalty category. Now add the flows to the actions.

Run Program Process Action in Flow Builder

Now a loyalty admin can run loyalty program processes in Flow Builder. Use the Run Program Process action in a flow to process transactional and nontransactional processes, such as processing transaction journals, crediting and debiting points, updating member details. For example, to determine how many points are credited to a member who joins a loyalty program, create the Credit Points process. Specify the parameters. Define a rule. Then run the Credit Points action in Flow Builder.

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:

From Setup, in the Quick Find box, enter `Flows`. Create a flow. When you add an action, select the **Loyalty** category. From the loyalty program process actions, search for and select your process. Define the action. Specify the input values, and then activate the action.

Run Sub Processes of a Loyalty Program Process Automatically

You can now run relevant transactional or nontransactional processes as sub processes of your loyalty program process. For example, a member's tier can change depending on the points that are credited to the points balance account. Earlier you had to run the credit points and change member tier processes every time. Instead, now you can run these processes automatically by setting the process as sub process of your primary process, loyalty program process, by adding an action, Run Program Process in the rule.

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:
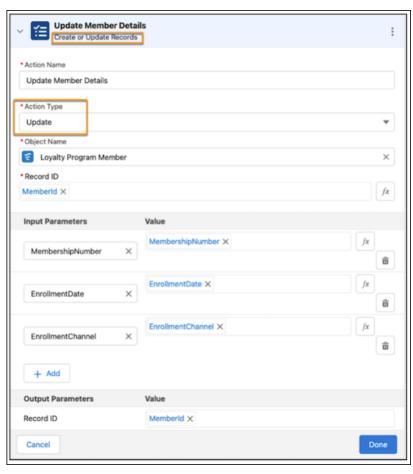
When you define a loyalty program process, add the Run Program Process action in the rule. Specify the Program Process Type, Program Process name, and the process parameters. Activate the rule and the process.

Create or Update Records Automatically

You can now create or update a record automatically from a loyalty process rule in Promotion Setup. For example, when you process member transactions, you want to create a member tier based on the number of accrued points. Or when you run loyalty program process for Updating Member Details, such as mobile phone number or email ID, you want to update the Contact record of the member. Now you can perform these tasks as one task. Define the action and include it with the Update Member Details process.

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: For example, when you use the Update Member Details process template, go to the Rules section of your process and add the Create or Update Records action.
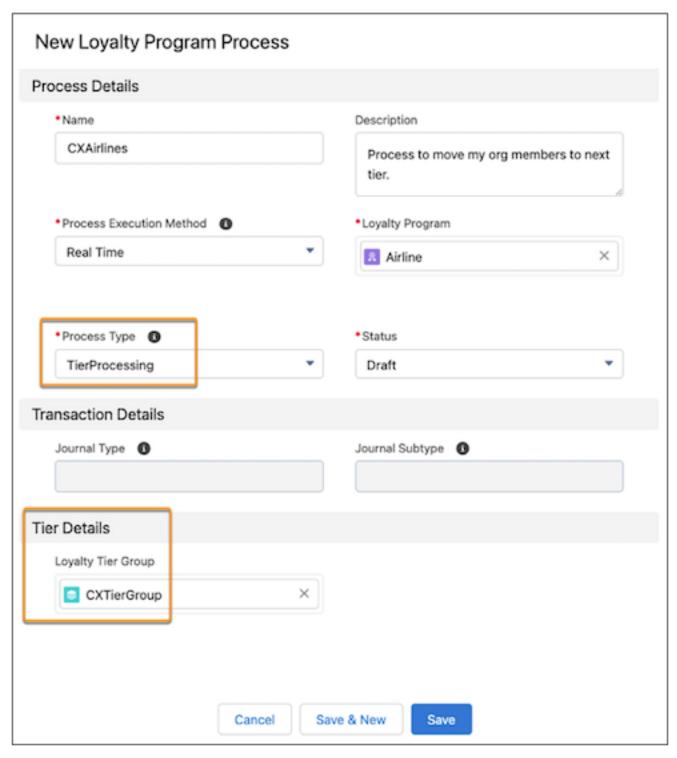
To update the Contact record of the member, select the **Update Record** action type. Set the values for the input and output parameters. Activate the rule and the process, and then run the API. The Contact record now gets automatically updated.

Change Member Tiers Automatically

Now loyalty program managers can automatically move a member from one tier to another by defining a loyalty program process.

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:

New Loyalty Program Process

Process Details

*Name

CXAirlines

Description

Process to move my org members to next tier.

*Process Execution Method ⓘ

Real Time

*Loyalty Program

👥 Airline   ✕

*Process Type ⓘ

TierProcessing

*Status

Draft

Transaction Details

Journal Type ⓘ

Journal Subtype ⓘ

Tier Details

Loyalty Tier Group

⬚ CXTierGroup   ✕

Cancel   Save & New   Save

When creating and defining a loyalty program process to change member tiers, for process type, select `Tier Processing`. Then select a loyalty tier group to represent the information about the tier group of a loyalty program.

Use Loyalty Program Process Aliases

Use aliases to quickly and easily specify object fields as resources. You can also use aliases for loyalty objects and fields instead of providing the object-field relationships. To make loyalty aliases available as resources, define the formula in a rule condition.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.
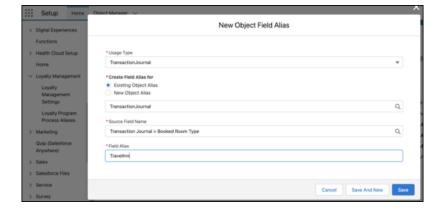
How:

To access a rule's loyalty aliases in the Resources list, in the rule condition, go to **Resources** > **Loyalty Aliases**.

An admin can configure loyalty aliases by going to **Setup** > **Loyalty Management** > **Loyalty Program Process Aliases**.

Merge Duplicate Member Records and Multiple Memberships

Merge duplicate loyalty program memberships or multiple memberships of members who want to maintain only one membership. Points and vouchers from merged memberships are transferred to the member's active membership. The active membership is also assigned the tier that's higher between the merged memberships' tier and the active membership's current tier. You can also unmerge memberships if you merged memberships by mistake or if members want to restore their merged memberships. The capability to merge memberships helps to automatically merge memberships on member requests and reduces the time and effort required by customer service reps to merge member data manually.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Loyalty Management - Growth or the Loyalty Management - Advanced license is enabled.

How: To merge memberships, use the Merge Loyalty Program Memberships action in a flow. To unmerge memberships, use the Unmerge Loyalty Program Memberships action.

SEE ALSO:

 Salesforce Help: Merge and Unmerge Memberships (can be outdated or unavailable during release preview)

Give Partners Access to Program Engagement Details

Now give your loyalty program partners access to their partnership details, such as transaction journals, partner ledgers, partner currencies, joint promotions, and products, on your Experience Cloud site. Prepaid partners can track their prepaid packs too.

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: Provide the Contact records associated with your partners the permissions to access your site.

SEE ALSO:

 Salesforce Help: Allow Partners to View Their Partnership Details on their Site (can be outdated or unavailable during release preview)

Alert Agents When Member Activities Require Action
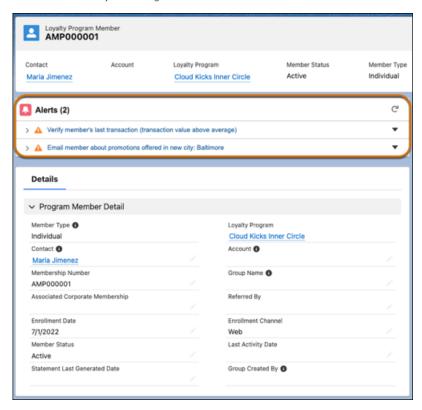
Notify your agents whenever changes in a Loyalty Program Member record or a Transaction Journal record require agents to act. For example, if a member's address changes, you can alert your agents to offer the member promotions that are applicable to the new location. You can also alert agents if a voucher is redeemed from a location that's far from the member's current address. The alerts appear on Loyalty Program Member and the Transaction Journal records. You can create record alerts manually or automatically.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Loyalty Management, Financial Services Cloud, Industry Service Excellence, and OmniStudio are enabled.

Who: To use the Flexcard component that shows alerts on Loyalty Program Member records and Transaction Journal records, users need the Loyalty Management, the OmniStudio Admin, and the Industry Service Excellence permission sets. To create and view the Record Alert records, you need the Loyalty Management and the Industry Service Excellence permission sets.

How: To add the Flexcard component to Loyalty Program Member and the Transaction Journal records, click **Setup**, and then select **Edit Page**. Drag the Flexcard component from the Components section on to your page layout. Save and activate the page layout.

To create a record alert, from the App Launcher, find, and select **Record Alerts**. Click **New**. In What Record, select the Loyalty Program Member record or the Transaction Journal record that you want to show the alert in. Add the subject and the date range for which the alert is visible. Save your changes.

SEE ALSO:

Salesforce Help: Record Alerts for Loyalty Program Members and Transaction Journals (can be outdated or unavailable during release preview)

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.

When: This update was first available in Summer '22.

How: Contact your Salesforce representative to know more about Loyalty Management for Commerce.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Create badges for your loyalty program
Use the new LoyaltyProgramBadge object.

Receive notification when a loyalty program badge is created, updated, or deleted
Use the new LoyaltyProgramBadgeChangeEvent object.

View changes in a Loyalty Program Badge record
Use the new LoyaltyProgramBadgeFeed object.

View the change in field values of a Loyalty Program Badge record
Use the new LoyaltyProgramBadgeHistory object.

View the owner sharing rule of a Loyalty Program Badge record
Use the new LoyaltyProgramBadgeOwnerSharingRule object.

View the sharing entry of a Loyalty Program Badge record
Use the new LoyaltyProgramBadgeShare object.

Assign badges to your loyalty program members
Use the new LoyaltyProgramMemberBadge object.

Receive notification when a loyalty program member badge is created, updated, or deleted
Use the new LoyaltyProgramMemberBadgeChangeEvent object.

View changes in a Loyalty Program Member Badge record
Use the new LoyaltyProgramMemberBadgeFeed object.

View the change in field values of a Loyalty Program Member Badge record
Use the new LoyaltyProgramMemberBadgeHistory object.

View the owner sharing rule of a Loyalty Program Member Badge record
Use the new LoyaltyProgramMemberBadgeOwnerSharingRule object.

View the sharing entry of a Loyalty Program Member Badge record
Use the new LoyaltyProgramMemberBadgeShare object.

View the details of the merged loyalty program memberships
Use the new LoyaltyProgramMemberMerge object.

Receive notification when a Loyalty Program Member Merge record is created, updated, or deleted
Use the new LoyaltyProgramMemberMergeChangeEvent object.

View changes in a Loyalty Program Member Merge record
Use the new LoyaltyProgramMemberMergeFeed object.

View the change in field values of a Loyalty Program Member Merge record
Use the new LoyaltyProgramMemberMergeHistory object.

View the owner sharing rule of a Loyalty Program Member Merge record
Use the new LoyaltyProgramMemberMergeOwnerSharingRule object.

View the sharing entry of a Loyalty Program Member Merge record
> Use the new LoyaltyProgramMemberMergeShare object.

View which promotions a member is eligible for
> Use the new LoyaltyPgmMbrPromEligView object.

Receive notification when a Loyalty Program Member Promotion Eligibility View record is created, updated, or deleted
> Use the new LoyaltyPgmMbrPromEligViewChangeEvent object.

View changes in a Loyalty Program Member Promotion Eligibility View record
> Use the new LoyaltyPgmMbrPromEligViewFeed object.

View the change in field values of a Loyalty Program Member Promotion Eligibility View record
> Use the new LoyaltyPgmMbrPromEligViewHistory object.

View the owner sharing rule of a Loyalty Program Member Promotion Eligibility View record
> Use the new LoyaltyPgmMbrPromEligViewOwnerSharingRule object.

View the sharing entry of a Loyalty Program Member Promotion Eligibility View record
> Use the new LoyaltyPgmMbrPromEligViewShare object.

Review merged memberships
> Use the new `Merged` values in the `MemberStatus` field of the LoyaltyProgramMember object.

Associate a tier group with a loyalty program process
> Use the new `LoyaltyTierGroup` field of the LoyaltyProgramProcess object.

New Invocable Actions in Loyalty Management

Use the new invocable actions for Loyalty Management.

Merge two active loyalty program member records that belong to the same loyalty program
> Use the new mergeLoyaltyProgramMembership action.

Run an active loyalty program process setup action
> Use the new runProgramProcess custom action.

Unmerge loyalty program member records
> Use the new unmergeLoyaltyProgramMembership action.

New and changed Loyalty Management Metadata Types

Make the most of the new and changed metadata types of Loyalty Management.

Assign a badge to a loyalty program member
> Use the new `AssignBadgeToMember` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup metadata type.

Change the tier of a loyalty program member
> Use the new `ChangeMemberTier` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup metadata type.

Check whether a badge is assigned to a loyalty program member
> Use the new `CheckMemberBadgeAssignment` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup metadata type.

Create or update records in the target object by the loyalty program process action
Use the new `Crud` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup
metadata type.

**Control whether the Promotion Eligibility component categorizes promotions based on whether the member belongs to
the promotion's campaign or Customer Data Platform segment**
Use the new `enableLoyaltyRulesVerifyCdpMemberSegment` field on the IndustriesLoyaltySettings metadata type.

Get promotions of a loyalty program member
Use the new `GetMemberPromotions` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the
LoyaltyProgramSetup metadata type.

Run an active loyalty program process as a subprocess
Use the new `RunProgramProcess` value in the `actionType` field of the LoyaltyProgramProcessAction subtype of the
LoyaltyProgramSetup metadata type.

Specify the subprogram process that's run by the loyalty program process action
Use the new `loyaltyProgramProcess` field on the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup
metadata type.

Specify the type of operation to perform on target object records by the loyalty program process action
Use the new `crudActionType` field on the LoyaltyProgramProcessAction subtype of the LoyaltyProgramSetup metadata type.

Specify the type of operator used in the loyalty program process action parameter
Use the new `operator` field on the LoyaltyProgramProcessActionParameter subtype of the LoyaltyProgramSetup metadata type.

Specify the sequence number of the parameter in the loyalty program process action
Use the new `sequenceNumber` field on the LoyaltyProgramProcessActionParameter subtype of the LoyaltyProgramSetup
metadata type.

Specify the type of value to provide in the loyalty program process action parameter
Use the new `valueType` field on the LoyaltyProgramProcessActionParameter subtype of the LoyaltyProgramSetup metadata
type.

Salesforce Flow

Merges two active loyalty program member records that belong to the same loyalty program
Use the new `mergeLoyaltyProgramMembership` value in the existing `actionType` field, which is on the existing
FlowActionCall subtype of the Flow metadata type.

Run loyalty program processes for pending transaction journals
Use the new `runProgramProcessForTransactionJournal` value in the existing `actionType` field, which is on
the FlowActionCall subtype of the Flow metadata type.

Unmerges loyalty program member records have a Merged status
Use the new `unmergeLoyaltyProgramMembership` value in the existing `actionType` field, which is on the existing
FlowActionCall subtype of the Flow metadata type.

SEE ALSO:

   Loyalty Management Developer Guide: LoyaltyProgramSetup (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.

Execute a loyalty process created from a loyalty program process template

Make a POST request to the new
`/connect/loyalty/programs/$`***{programName}***`/program-processes/$`***{processName}*** resource.

New request body: Loyalty Process Input

New response body: Loyalty Process Output

Retrieve transaction journals of a loyalty member

Make a POST request to the new `/connect/loyalty/programs/$`***{programName}***`/transaction-history`
resource.

New request body: Loyalty Transaction Journal History Input

New response body: Loyalty Transaction Journal History Output

SEE ALSO:

Loyalty Management Developer Guide: Loyalty Management Business API

Manufacturing Cloud

Do more with enhancements to Sales Agreements and Advanced Account Forecasts and build strong relationships with the new Service Console for Manufacturing and Partner Visit Management capabilities. Define sales agreements with weekly schedules. Mass update multiple values in Advanced Account Forecasts and view the necessary forecast information with advanced filters. Use Service Console for Manufacturing to deliver a seamless service experience to your customers. Enhance collaboration with your manufacturing partners by helping sales managers schedule effective visits and field reps complete visit tasks.

IN THIS SECTION:

Manufacturing for Sales

Take advantage of enhancements to Sales Agreements, Account Forecasting, and Advanced Account Forecasting to plan and predict your business transactions with more granularity and ease. Plan negotiations and track customer performance at a granular level with weekly sales agreements. Update the values in your advanced account forecasts with mass-update to avoid errors and save time. Focus on the desired forecast information by applying advanced filters in advanced account forecasts. Get timely alerts on the completion or failure of your forecast processes or mass update operations and take the suggested actions.

Manufacturing for Service

Enable your customer service representatives (CSRs) to deliver the best service experience with Manufacturing for Service. Use the Service Console for Manufacturing to receive customer calls, create contacts and cases, register products, and process returns, all without losing the context of the interaction or switching screens. Build stronger customer relationships with Manufacturing Service Excellence components.

Partner Visit Management

Plan visits to enhance collaboration and strengthen relationships with your manufacturing partners. Assess distributor performance, renew warranties or sales agreements, resolve cases, or upsell products during visits. Sales managers can schedule visits. Field reps can perform visits and complete visit tasks.

Create a Manufacturing Cloud Pre-Release Trial Org

Sign up for a Manufacturing Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Get Guided Help Setting Up Manufacturing Cloud

Get help directly in the app when setting up Manufacturing Cloud using the Guided Setup experience. Follow simple, clear steps for all the tasks you must complete for setting up sales agreements, forecasting, and more. Steps either take you directly to Setup pages, or link off to help articles, Trailhead content, or videos where you can read more information about the task. Manufacturing Cloud for Sales and Manufacturing Cloud for Service each have their own guided setup path.

Changed Objects for Manufacturing Cloud

Do more with the updated Manufacturing Cloud objects.

New Invocable Actions in Manufacturing Cloud

Use the new invocable actions for Manufacturing Cloud.

New Manufacturing Cloud Metadata Types

Make the most of the new and changed metadata types of Manufacturing Cloud.

New Manufacturing Cloud Tooling API Objects

Make the most of the new and changed tooling API objects of the Manufacturing Cloud.

Manufacturing for Sales

Take advantage of enhancements to Sales Agreements, Account Forecasting, and Advanced Account Forecasting to plan and predict your business transactions with more granularity and ease. Plan negotiations and track customer performance at a granular level with weekly sales agreements. Update the values in your advanced account forecasts with mass-update to avoid errors and save time. Focus on the desired forecast information by applying advanced filters in advanced account forecasts. Get timely alerts on the completion or failure of your forecast processes or mass update operations and take the suggested actions.

IN THIS SECTION:

Create Sales Agreements with Weekly Schedules

Create sales agreements with weekly schedules in addition to one-time, monthly, quarterly, and yearly schedules.

Update Multiple Values in Advanced Account Forecasts

Mass update your advanced account forecasts to simultaneously update values across multiple dimensions, such as products or locations, with a single click. Account managers can update values for a measure across multiple periods at a time. Create a list view on the Advanced Account Forecast Fact object then mass update values using the list view on the Advanced Account Forecast Set Partners object.

View Meaningful Forecasts Using Advanced Filters

Apply advanced filters to declutter the forecast view and focus on select information. Create a list view on the Advanced Account Forecast Fact object and use this list view to filter forecast data on the Advanced Account Forecast Set Partners object.

Filter Advanced Account Forecasts by Period Start Date

To view or mass update advanced account forecast values for specific periods, filter your forecasts by the period start date on the Advanced Account Forecast Fact object. The four predefined Data Processing Engine templates provided with Manufacturing Cloud now write back the period start date on each forecast fact record.

Get Notified on the Status of Your Account Forecast Operations

Receive alerts when your scheduled forecast processes or mass update operation completes or fails. With timely in-app notifications and email alerts, admins and account managers now get visibility into process failures and can take the suggested next actions. Based on the reason of failure, account managers can either rerun a process or contact their admin.

Create Sales Agreements with Weekly Schedules

Create sales agreements with weekly schedules in addition to one-time, monthly, quarterly, and yearly schedules.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Sales Agreements permission set.

How: From the App Launcher, find and open the **Sales Agreements** object, and then click **New**. Specify the sales agreement details and select the **Weekly** schedule frequency.

SEE ALSO:

    Salesforce Help: Create a Sales Agreement (can be outdated or unavailable during release preview)

Update Multiple Values in Advanced Account Forecasts

Mass update your advanced account forecasts to simultaneously update values across multiple dimensions, such as products or locations, with a single click. Account managers can update values for a measure across multiple periods at a time. Create a list view on the Advanced Account Forecast Fact object then mass update values using the list view on the Advanced Account Forecast Set Partners object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Advanced Account Forecast permission set.

How: From the App Launcher, find and select **Advanced Account Forecast Set Partners**. Select a record to view its forecasts. Click **Mass Update**. Specify the update criteria and click **Save**. Your account manager receives in-app notifications when the process is complete.

Mass Update

___

Select a measure

* Measure

Order Quantity ▼

Select a list view

* Advanced Account Forecast Fact List ⓘ

Hammer L20 - 2022   ✕

Select a formula

* Action   * Value

Increase By ▼   10.00%

☑ Use as percentage

⚠ Applied mass updates can't be undone.   ✕

Cancel   **Save**

SEE ALSO:

Salesforce Help: Update Multiple Values in Advanced Account Forecasts (can be outdated or unavailable during release preview)

View Meaningful Forecasts Using Advanced Filters
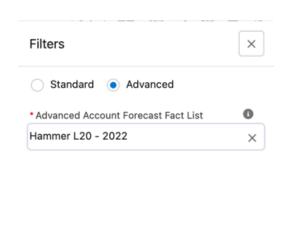
Apply advanced filters to declutter the forecast view and focus on select information. Create a list view on the Advanced Account Forecast Fact object and use this list view to filter forecast data on the Advanced Account Forecast Set Partners object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Advanced Account Forecast permission set.

Why: If your forecast fact object has multiple dimensions and measures, you can create a list view to group records by applying a filter condition for selected measures and dimensions. The same filter criteria is applied on the forecast grid when you select the list view as an advanced filter on an Advanced Account Forecast Set Partner record.

How: From the App Launcher, find and select your advanced account forecast fact object. Ensure that you created at least one list view for the fact object. Next, from the App Launcher, find and select **Advanced Account Forecast Set Partners**. Click the filter icon and select **Advanced**. Select an advanced account forecast fact list from the dropdown and click **Apply**.

Filter Advanced Account Forecasts by Period Start Date

To view or mass update advanced account forecast values for specific periods, filter your forecasts by the period start date on the Advanced Account Forecast Fact object. The four predefined Data Processing Engine templates provided with Manufacturing Cloud now write back the period start date on each forecast fact record.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Advanced Account Forecast permission set.

Why: Period filters can help you view forecast values for a specific quarter. For example, the advanced account forecasts for Acme have quarterly periods and an account manager wants to view the forecast values for the first quarter of the year. To see this data, the sales manager first creates a list view on the Advanced Account Forecast Fact object with records filtered by the period start date of the first quarter. Then, the sales manager can use this list view to filter forecast data on the Advanced Account Forecast Set Partner record for Acme.

How: From the App Launcher, find and select **Advanced Account Forecast Fact**. Create a list view and use Period Start Date as a filter criteria.

SEE ALSO:

Salesforce Help: Filter Forecasts by Forecast Fact List Views (can be outdated or unavailable during release preview)

Get Notified on the Status of Your Account Forecast Operations

Receive alerts when your scheduled forecast processes or mass update operation completes or fails. With timely in-app notifications and email alerts, admins and account managers now get visibility into process failures and can take the suggested next actions. Based on the reason of failure, account managers can either rerun a process or contact their admin.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Manufacturing Account Forecast permission set.

SEE ALSO:

Salesforce Help: Notifications for Account Forecast Operations (can be outdated or unavailable during release preview)

Manufacturing for Service

Enable your customer service representatives (CSRs) to deliver the best service experience with Manufacturing for Service. Use the Service Console for Manufacturing to receive customer calls, create contacts and cases, register products, and process returns, all without losing the context of the interaction or switching screens. Build stronger customer relationships with Manufacturing Service Excellence components.

IN THIS SECTION:

Deliver Excellent Customer Service with Service Console for Manufacturing

Empower your customer service representatives (CSRs) to deliver a seamless service experience and increase customer satisfaction and trust with Service Console for Manufacturing. CSRs can resolve customer queries with a unified, holistic view of the customer. No more switching between different screens. CSRs can verify a customer's identity, view a timeline of interactions with the customer, and get visibility into related orders, assets, and cases. They can also search for knowledge articles, receive timely alerts on changes to records, take contextual actions, and capture interaction details—all on a single screen.

Manufacturing Service Excellence Components

Manage the end-to-end service journey and elevate your customer service experience with new and updated service components for Manufacturing. Verify the identity of a customer or a customer's authorized representative to address their requirements and prevent unauthorized use of customer details with Identity Verification flows. Detect potential cases of compliance fraud and identity breach and meet audit compliance standards with Audit Trail. Resolve customer queries that comes your way by launching actions such as flows or quick actions from the Action Launcher. To get the best out of Manufacturing Service Excellence, use the components within the Service Console for Manufacturing.

Deliver Excellent Customer Service with Service Console for Manufacturing
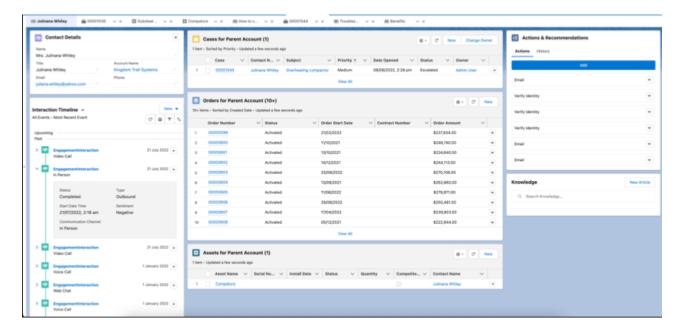
Empower your customer service representatives (CSRs) to deliver a seamless service experience and increase customer satisfaction and trust with Service Console for Manufacturing. CSRs can resolve customer queries with a unified, holistic view of the customer. No more switching between different screens. CSRs can verify a customer's identity, view a timeline of interactions with the customer, and get visibility into related orders, assets, and cases. They can also search for knowledge articles, receive timely alerts on changes to records, take contextual actions, and capture interaction details—all on a single screen.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

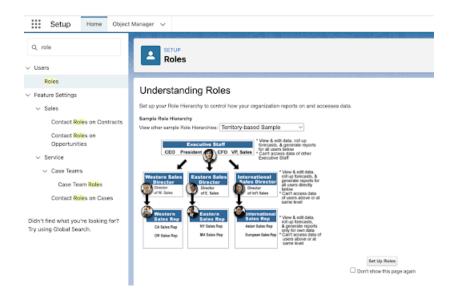**Who:** The Service Console for Manufacturing is available only to users who have the Service Console for Manufacturing permission set. To use all the components provided in the console, users also need the Industry Service Excellence permission set.

Why: The Service Console for Manufacturing lets CSRs manage end-to-end service interactions in one place. The console comes with a predefined identity verification flow, a preconfigured timeline view of engagements, and a holistic view of the customer with predefined lists such as list of associated accounts and assets. CSRs can also use the components of the console, such as Identity Verification, in standard navigation apps.

How: From the App Launcher, find and select **Service Console for Manufacturing**.

SEE ALSO:

   Salesforce Help: Set Up and Configure the Service Console for Manufacturing (can be outdated or unavailable during release preview)

   Salesforce Help: Get to Know the Service Console for Manufacturing (can be outdated or unavailable during release preview)

Manufacturing Service Excellence Components

Manage the end-to-end service journey and elevate your customer service experience with new and updated service components for Manufacturing. Verify the identity of a customer or a customer's authorized representative to address their requirements and prevent unauthorized use of customer details with Identity Verification flows. Detect potential cases of compliance fraud and identity breach and meet audit compliance standards with Audit Trail. Resolve customer queries that comes your way by launching actions such as flows or quick actions from the Action Launcher. To get the best out of Manufacturing Service Excellence, use the components within the Service Console for Manufacturing.

IN THIS SECTION:

[Help Customers by Launching Actions Quickly](#)

A customer service representative (CSR) can now launch actions, such as flows, OmniScripts, or quick actions, directly from Action Launcher and provide prompt customer service.

[Ensure Privacy and Security of Customers](#)

You can now analyze the customer identity verification audit records to ensure the privacy and security of customers. The records are generated when the customer service representatives use the Verify Customer Identity flow to verify the identity of customers.

[Identity Verification](#)

A customer service representative can now verify the identity of a customer and a customer's authorized representative for engagements initiated via OpenCTI, Omni-Channel, and for in-person or physical engagements.

Help Customers by Launching Actions Quickly

A customer service representative (CSR) can now launch actions, such as flows, OmniScripts, or quick actions, directly from Action Launcher and provide prompt customer service.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: On the Action Launcher page in Setup, create a deployment by selecting the type of actions, objects, and associated actions that you want to include in Action Launcher. Then, add the Action Launcher component to a Lightning page in Lightning App Builder. Click the Action Launcher component. In the Properties panel, select the deployment you created from the Action Launcher Deployment dropdown list.

SEE ALSO:

[Salesforce Help: Launch Actions to Resolve Customer Queries with Action Launcher (can be outdated or unavailable during release preview)](#)

Ensure Privacy and Security of Customers

You can now analyze the customer identity verification audit records to ensure the privacy and security of customers. The records are generated when the customer service representatives use the Verify Customer Identity flow to verify the identity of customers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: On the Profiles page in Setup, make the Audit Trail tab available for the System Administrator profile so that they can access Audit Trail.

SEE ALSO:

[Salesforce Help: Ensure Privacy of Customers With Audit Trail (can be outdated or unavailable during release preview)](#)

Identity Verification

A customer service representative can now verify the identity of a customer and a customer's authorized representative for engagements initiated via OpenCTI, Omni-Channel, and for in-person or physical engagements.

IN THIS SECTION:

Verify the Identity of a Customer When an Engagement Is Physically Initiated

Your users can now verify the identity of a customer or a customer's authorized representative who contacts your company in person.

Verify the Identity of a Customer When an Engagement Is Initiated Via Omni-Channel

Enable your users to verify the identity of a customer or a customer's authorized representative who initiates an engagement over voice call via Omni-Channel in Manufacturing Cloud.

Enable Users to Access the Verification Flow from the Record Page or the Utility Bar

If your users perform identity verification using an engagement interaction or a voice call, then a record ID is passed into the configured identity verification flow. For these use cases, set up and use the Verify Customer Identity Base Flow template.

Implement Tertiary Verification

You can now configure three or more levels of verification depending on your requirements. Previously, you configured a two-level verification process for the customer service representative (CSR) to verify the identities of the persons calling on behalf of customers and of the customer themselves. Consider an authorized customer representative (the caller), the customer, and the legal ward of the customer. If the representative calls on behalf of the customer with a request involving the legal ward's account details, the CSR had to verify the identities of the caller, the customer, and the legal ward. The two-level verification process isn't adequate to handle this requirement.

Enable Users to Take Appropriate Actions for Prospective Customers

What if a person connecting with the customer service representative (CSR) doesn't have a presence in the configured data source (Salesforce or external)? Earlier, the CSR had to say that they are unable to find the record in the system. You can now enable CSRs to take an appropriate action, for example, create a lead.

Disable Auto-Creation of Engagement Attendees

When a customer initiates an engagement with a customer service representative, an internal engagement attendee record is automatically created. To disable automatic creation of internal engagement attendee records, turn the Auto-creation of Internal Attendee Record permission off.

Enable Users to Visually Track the Process of Engagement Interactions

Use Path Assistant to create paths to guide your users through the steps of a business process, such as working on an engagement interaction from initiation to successful resolution. Configure a path assistant on the Engagement Interaction object and then add the Path component to the Engagement Interaction record page.

Manage Sharing and Ownership of Engagement Interactions

Use the Sharing Settings page to manage your organization-wide sharing defaults for Engagement Interaction. Manage user access to engagement interactions using role hierarchies. Facilitate prioritization and assignment of engagement interactions using queues. Your users too can change ownership of engagement interactions. If CSRs need inputs on an engagement interaction from someone else, CSRs can share the engagement interaction.

Use the Save Member Verification Steps Flow Action

The Verify Customer Identity flow template uses the Save Member Verification Steps action. This action stores the verification data (non-personal information) collected from the identity verification flow for auditing and reporting purposes.

SEE ALSO:

Salesforce Help: Protect the Identity of Your Manufacturing Customers (can be outdated or unavailable during release preview)

Verify the Identity of a Customer When an Engagement Is Physically Initiated

Your users can now verify the identity of a customer or a customer's authorized representative who contacts your company in person.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: No setup is required to enable users to verify the identity of a person who has made in-person contact. Users have to create an engagement interaction record, fill in the required details, and get started with the verification flow.

Verify the Identity of a Customer When an Engagement Is Initiated Via Omni-Channel

Enable your users to verify the identity of a customer or a customer's authorized representative who initiates an engagement over voice call via Omni-Channel in Manufacturing Cloud.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: In Flow Builder, create a flow using the Verify Customer Identity flow template. Next, create a Voice Call Lightning record page. Finally, make the flow available to agents by adding the flow to the Voice Call record page in Lightning App Builder.

Enable Users to Access the Verification Flow from the Record Page or the Utility Bar

If your users perform identity verification using an engagement interaction or a voice call, then a record ID is passed into the configured identity verification flow. For these use cases, set up and use the Verify Customer Identity Base Flow template.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

Why: If a record ID is passed into a flow, users access the flow from the corresponding record page. If no record ID exists, users launch the flow from the utility bar.

How: In Flow Builder, create a flow using the Verify Customer Identity Base Flow flow template. Next, create an Engagement Interaction and a Voice Call Lightning record page. Add the flow to the Engagement Interaction and the Voice Call record pages in Lightning App Builder. Next, add the flow to the utility bar of a Lightning app using the App Manager.

Implement Tertiary Verification

You can now configure three or more levels of verification depending on your requirements. Previously, you configured a two-level verification process for the customer service representative (CSR) to verify the identities of the persons calling on behalf of customers and of the customer themselves. Consider an authorized customer representative (the caller), the customer, and the legal ward of the customer. If the representative calls on behalf of the customer with a request involving the legal ward's account details, the CSR had to verify the identities of the caller, the customer, and the legal ward. The two-level verification process isn't adequate to handle this requirement.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: Create three Identity Verification Process Detail records: A for primary, B for secondary, and C for tertiary verifications. Edit A and set the value of the Linked Identity Verification Process Detail field to B. Then, edit B and set the value of the Linked Identity Verification Process Detail field to C. In addition, you have to perform the other tasks required to set up identity verification.

Identity Verification Process Detail
SampleAccountSearch

Identity Verification Process Detail Detail	Edit	Delete	Clone

▼ Description Information

Label	Sample Account Search
Name	SampleAccountSearch
Identity Verification Process Definition	Sample Verification Flow
Search Sequence Number	1
Data Source Type	External
Search Type	Text-Based
Object Name	Account
Search Record Unique ID Field	Id
Search Filter	
Search Result Sort By	Name
Optional Verifiers Minimum Verification Count	1
Apex Class	MockIdentityVerificationExt
Is Active	✓
Linked Identity Verification Process Detail	TESTAccount Search

Edit	Delete	Clone

Enable Users to Take Appropriate Actions for Prospective Customers

What if a person connecting with the customer service representative (CSR) doesn't have a presence in the configured data source (Salesforce or external)? Earlier, the CSR had to say that they are unable to find the record in the system. You can now enable CSRs to take an appropriate action, for example, create a lead.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: In Flow Builder, create a flow using the Verify Customer Identity flow template.

Disable Auto-Creation of Engagement Attendees

When a customer initiates an engagement with a customer service representative, an internal engagement attendee record is automatically created. To disable automatic creation of internal engagement attendee records, turn the Auto-creation of Internal Attendee Record permission off.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: From Setup, in the Quick Find box, enter `Attendee Settings` and then select **Attendee Settings**. Turn off the org permission.

Enable Users to Visually Track the Process of Engagement Interactions

Use Path Assistant to create paths to guide your users through the steps of a business process, such as working on an engagement interaction from initiation to successful resolution. Configure a path assistant on the Engagement Interaction object and then add the Path component to the Engagement Interaction record page.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

Manage Sharing and Ownership of Engagement Interactions

Use the Sharing Settings page to manage your organization-wide sharing defaults for Engagement Interaction. Manage user access to engagement interactions using role hierarchies. Facilitate prioritization and assignment of engagement interactions using queues. Your users too can change ownership of engagement interactions. If CSRs need inputs on an engagement interaction from someone else, CSRs can share the engagement interaction.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: To set organization-wide default sharing settings, from Setup, in the Quick Find box, enter and select **Sharing Settings**. Search for Engagement Interactions and then edit the entry to change the default internal access value.
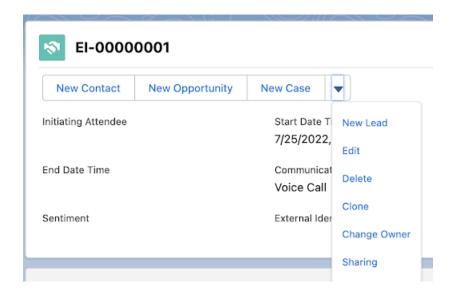
To manage access using role hierarchies, from Setup, in the Quick Find box, enter `Roles` and select **Roles** and then set up roles:

To enable users to better manage their engagement interaction workload, from Setup, in the Quick Find box, enter and select **Queues**, and then create a queue.

You and the owner of an engagement interaction record can share the record with other org users. When sharing, you or the record owner can assign users Read or Read\Write access to the record. If the organization-wide default internal access is set to Public Read Only and you or the record owner provide Read access to other users when sharing a record, an error is displayed. Also, you or the owner of an engagement interaction record can change the ownership of a record to any other org user.

Use the Save Member Verification Steps Flow Action

The Verify Customer Identity flow template uses the Save Member Verification Steps action. This action stores the verification data (non-personal information) collected from the identity verification flow for auditing and reporting purposes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Industry Service Excellence permission set license.

How: To use the Build Identity Verification Context action, in the Flow Builder, add an action to the flow you're creating or customizing and select **Save Member Verification Steps**.

Partner Visit Management

Plan visits to enhance collaboration and strengthen relationships with your manufacturing partners. Assess distributor performance, renew warranties or sales agreements, resolve cases, or upsell products during visits. Sales managers can schedule visits. Field reps can perform visits and complete visit tasks.

IN THIS SECTION:

Display Visits and Visit Task Information for Sales Managers and Field Reps

Help your sales managers schedule visits and field reps perform visits. Create visit and visit task pages with the Visit Overview, Visit Actions, Visit Task List, Visit List, and Visit Map components.

Plan Effective Visits to Your Manufacturing Partners

Set up visits for your field reps by specifying visit details like location, priority, estimated visit time, and previous visit history. Create action plan templates to quickly assign tasks for multiple visits and mark tasks mandatory as needed. Track key metrics for each task.

Perform Tasks and Capture Metrics During Visits

Field reps can view the list of visits on their mobile app and navigate to the partner location with the embedded map. Field reps can check off tasks, capture key performance metrics, and note down observations during the visit.

Display Visits and Visit Task Information for Sales Managers and Field Reps

Help your sales managers schedule visits and field reps perform visits. Create visit and visit task pages with the Visit Overview, Visit Actions, Visit Task List, Visit List, and Visit Map components.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Partner Visit Management for Manufacturing permission set.

How: Use the Lightning App Builder to customize the Visit record page for your users and add the Visit Overview, Visit Actions, Visit Task List, Visit List, and Visit Map components to your desktop and mobile page layouts as per requirements.

SEE ALSO:

Salesforce Help: Configure Page Layouts to View Visit Information (can be outdated or unavailable during release preview)

Plan Effective Visits to Your Manufacturing Partners

Set up visits for your field reps by specifying visit details like location, priority, estimated visit time, and previous visit history. Create action plan templates to quickly assign tasks for multiple visits and mark tasks mandatory as needed. Track key metrics for each task.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Partner Visit Management for Manufacturing permission set.

How: To create a visit, find and select **Visits** from the App Launcher, then click **New**.

To create an action plan template, find and select **Action Plan Templates** from the App Launcher. Add Generic Assessment Tasks and publish the template. You can also find and select **Assessment Indicator Definitions** to define the key metrics.

To compare the expected results to the actual values for each metric, find and select **Generic Visit Key Performance Indicators** from the App Launcher.

SEE ALSO:

Salesforce Help: Plan and Schedule Visits (can be outdated or unavailable during release preview)

Perform Tasks and Capture Metrics During Visits

Field reps can view the list of visits on their mobile app and navigate to the partner location with the embedded map. Field reps can check off tasks, capture key performance metrics, and note down observations during the visit.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

Who: This feature is available only to users who have the Partner Visit Management for Manufacturing permission set.

How: From the App Launcher, find and select **Generic Visits**. Field reps can view the list of visits and associated tasks assigned to them.

SEE ALSO:

Salesforce Help: Perform Tasks and Capture Metrics for Visits (can be outdated or unavailable during release preview)

Create a Manufacturing Cloud Pre-Release Trial Org

Sign up for a Manufacturing Cloud pre-release trial org to get hands on and take a sneak peek at the features in this release.

Who: This pre-release trial org is great for admins, architects, and developers. You don't need any special permissions to sign up for an org.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/signup/manufacturing-cloud-prerelease-trial/. After your org is created, you'll receive an email with login details.

> **Note:**
> - Winter '23 pre-release trial orgs are available now until October 15, 2022.
> - Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

Get Guided Help Setting Up Manufacturing Cloud

Get help directly in the app when setting up Manufacturing Cloud using the Guided Setup experience. Follow simple, clear steps for all the tasks you must complete for setting up sales agreements, forecasting, and more. Steps either take you directly to Setup pages, or link off to help articles, Trailhead content, or videos where you can read more information about the task. Manufacturing Cloud for Sales and Manufacturing Cloud for Service each have their own guided setup path.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Manufacturing Cloud is enabled.

How: In the app, click the Trailhead icon in the global header, then click **Guidance Center**. From the Guidance Center home page, click **Get Started with Manufacturing Cloud**. If you don't see this option, click **View More**.

Why: The guided path is a great way to jump-start your Manufacturing Cloud implementation and track your overall progress.

Changed Objects for Manufacturing Cloud

Do more with the updated Manufacturing Cloud objects.

New Fields

View the associated manufacturing program from which an opportunity is created

Use the `Manufacturing Program` field on the Opportunity object.

Indicate whether an initiating attendee is authenticated

Use the `IsAuthenticated` field on the EngagementAttendee object.

Indicate whether an initiating attendee is verified

Use the `IsVerified` field on the EngagementAttendee object.

Indicate the role of an attendee

Use the `Role` field on the EngagementAttendee object.

Specify the time an engagement attendee is verified for an engagement interaction

Use the `VerificationTime` field on the EngagementAttendee object.

Auto-calculate the duration of an engagement interaction by updating the end time

Use the `Duration` field on the EngagementInteraction object. The field is now Read-only.

Store the reason for an engagement interaction

Use the `Reason` field on the EngagementInteraction object.

Summarize an engagement interaction

Use the `InteractionSummary` field on the EngagementTopic object.

Configure reasons for the failure of an identity verification process

Use the `ProcessFailureReason` field on the EngagementTopic object.

Configure the status values of a process run during an engagement interaction

Use the `ProcessStatus` field on the EngagementTopic object.

Changed Fields

Specify either the external or the internal attendee of an engagement interaction

Use the updated `ExternalAttendeeId` or `InternalAttendeeId` field on the EngagementAttendee object. You must specify the value of at least one of these fields.

Connect an engagement attendee to either an engagement interaction or a voice call

Use the updated `EngagementId` field on the EngagementAttendee object. The field is now required.

Configure more channels of communication between a customer and a customer service representative

Use the updated `AttendeeVerificationTime` field on the EngagementInteraction object. The field is now required.

Configure custom channels of communication between a customer and a customer service representative

Use the updated `CommunicationChannel` field on the EngagementInteraction object. The field is now required.

Configure custom values to indicate how an initiating attendee feels about an engagement interaction

Use the updated `Sentiment` field on the EngagementInteraction object.

Configure custom values to indicate the status of an engagement interaction

Use the updated `Status` field on the EngagementInteraction object.

Configure custom values to indicate the type of an engagement interaction

Use the updated `Type` field on the EngagementInteraction object.

Connect an engagement topic to either an engagement interaction or a voice call

Use the updated `EngagementId` field on the EngagementTopic object. The field is now required.

Define weekly sales agreement schedules

Use the `Weekly` value in the `ScheduleFrequency` field of the SalesAgreement object.

SEE ALSO:

Manufacturing Cloud Developer Guide: Manufacturing Cloud Standard Objects (can be outdated or unavailable during release preview)

New Invocable Actions in Manufacturing Cloud

Use the new invocable actions for Manufacturing Cloud.

Update a measure of AdvAccountForecastFact records based on filter condition of the selected list view
Use the new massUpdateAdvAccountForecast action.

New Manufacturing Cloud Metadata Types

Make the most of the new and changed metadata types of Manufacturing Cloud.

Metadata Types

Define forecast configurations using forecast sets
Use the new AdvAccountForecastSet metadata type.

Salesforce Flow

Update a measure of AdvAccountForecastFact records based on filter condition of the selected list view
Use the new `massUpdateAdvAccountForecast` value in the existing `actionType` field, which is on the existing FlowActionCall subtype of the Flow metadata type.

Settings

Enable Service Console for Manufacturing
Use the new `MfgServiceConsoleSettings` metadata type.

New Manufacturing Cloud Tooling API Objects

Make the most of the new and changed tooling API objects of the Manufacturing Cloud.

Create an advanced account forecast set
Use the new AdvAccountForecastSet object.

Create source to target mappings
Use the new ObjectHierarchyRelationship object.

Public Sector Solutions

Get closer to your constituents by understanding their lives, relationships, and history with your agencies. Add enrollees with greater ease and add tasks to your care plans. Configure more of your org with ease with new assistants in Guided Setup. Give constituents insights into the reasoning behind application decisions.

IN THIS SECTION:

Composable Case Management

Understand constituents' lives, relationships, and history with your agencies so that you can deliver custom services that help individuals and families succeed. Speed the process from intake and screening to providing services, and effectively assess constituents' progress over time.

Get More of Your Org Configured Easily with Guided Setup

Set up more aspects of your Public Sector Solutions org easily with new Guided Setup assistants. Now you can follow simple, clear steps to configure inspection management, analytics, and case management so that your users can be productive faster. Click links to Help articles to get more information for any setup task.

Decision Explainer for Constituents

Give constituents insights into fee calculations, eligibility determinations, and benefit calculations, and share the reasoning behind application decisions. Understanding the reasons behind decisions builds trust and can help the constituent successfully reapply for a license, permit, program, or service.

New and Changed Objects in Public Sector Solutions

Do more with these new and changed Public Sector Solutions objects.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Public Sector Solutions Connect REST APIs.

Composable Case Management

Understand constituents' lives, relationships, and history with your agencies so that you can deliver custom services that help individuals and families succeed. Speed the process from intake and screening to providing services, and effectively assess constituents' progress over time.

IN THIS SECTION:

View Key Milestones in a Constituent's Life

Get a deeper understanding of the individuals and families that you serve. Capture and visualize key events in a constituent's life, such as graduation, getting married, having a baby, and changing jobs, with the Life Events component.

See the History of a Constituent's Interactions with Caseworkers

Approach cases with background knowledge of a constituent's experience with your agency. View an interactive timeline that shows all of a constituent's interactions with your agencies, and select any interaction to quickly get more information.

Define Groups of Constituents to Administer Programs and Services

Collectively define individuals as households or other meaningful groups that you can use to allocate resources and deliver support services.

Get the Complete Picture of Constituent Relationships

See relevant relationships between constituents in visual graphs, and use them to inform recommendations for benefits and care plans. Explore and take action on the connections using the Actionable Relationship Center component.

Easily Gather the Details of Complaints for More Efficient Intake

Efficiently record important information about reported incidents and events so that intake officers and caseworkers can quickly start investigations, assessments, and cases to address the issue. Create and use guided flows to quickly ask all the right questions so that your agencies can act promptly and effectively, and capture, review, and manage complaints from a single console in the app.

Connect Referrals to Caseworkers to Speed Successful Outcomes

Automatically create and route cases to appropriate departments based on referrals from people and organizations outside of your agencies. Screen referrals and capture detailed notes so that you get the right service to constituents faster.

Keep Better Track of Discussions with Constituents with Interaction Summaries

Help caseworkers, case managers, and others stay on top of constituent communications by creating interaction summaries. Interaction summaries include detailed meeting notes that respect confidentiality as well as action items and next steps for goal assignments, benefit assignments, and care plans. Easily find information by searching for records based on the interaction summary title and meeting notes.

Enhanced Care Plans

Use care plans to provide the appropriate support for constituents in need. Create plans more easily and include tasks to help constituents stay on a path to success.

SEE ALSO:

Composable Case Management in Public Sector Solutions

View Key Milestones in a Constituent's Life

Get a deeper understanding of the individuals and families that you serve. Capture and visualize key events in a constituent's life, such as graduation, getting married, having a baby, and changing jobs, with the Life Events component.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Configure and View a Constituent's Life Events

See the History of a Constituent's Interactions with Caseworkers

Approach cases with background knowledge of a constituent's experience with your agency. View an interactive timeline that shows all of a constituent's interactions with your agencies, and select any interaction to quickly get more information.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Configure and Use Timelines in Public Sector Solutions

Define Groups of Constituents to Administer Programs and Services

Collectively define individuals as households or other meaningful groups that you can use to allocate resources and deliver support services.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Party Relationship Groups in Public Sector Solutions

Get the Complete Picture of Constituent Relationships

See relevant relationships between constituents in visual graphs, and use them to inform recommendations for benefits and care plans. Explore and take action on the connections using the Actionable Relationship Center component.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Configure and View Graphical Representations of Constituent Relationships](#)

Easily Gather the Details of Complaints for More Efficient Intake

Efficiently record important information about reported incidents and events so that intake officers and caseworkers can quickly start investigations, assessments, and cases to address the issue. Create and use guided flows to quickly ask all the right questions so that your agencies can act promptly and effectively, and capture, review, and manage complaints from a single console in the app.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Set Up a Complaint Intake Guided Flow](#)

Connect Referrals to Caseworkers to Speed Successful Outcomes

Automatically create and route cases to appropriate departments based on referrals from people and organizations outside of your agencies. Screen referrals and capture detailed notes so that you get the right service to constituents faster.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Case Referrals in Public Sector Solutions](#)

Keep Better Track of Discussions with Constituents with Interaction Summaries

Help caseworkers, case managers, and others stay on top of constituent communications by creating interaction summaries. Interaction summaries include detailed meeting notes that respect confidentiality as well as action items and next steps for goal assignments, benefit assignments, and care plans. Easily find information by searching for records based on the interaction summary title and meeting notes.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

[Configure and Use Interaction Summaries in Public Sector Solutions](#)

Enhanced Care Plans

Use care plans to provide the appropriate support for constituents in need. Create plans more easily and include tasks to help constituents stay on a path to success.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

IN THIS SECTION:

Create More Detailed Care Plans

More easily add and review enrollee information when assigning benefits and goals to care plans. Use custom fields to customize the guided flow to suit your organization's needs.

Add Tasks to Care Plans

Define tasks for care plans, benefits, and goals in a template so that you can easily reuse them. Only see the tasks that are relevant to the care plans, benefits, and goals that you're working on, and update multiple tasks at once. See upcoming and overdue tasks on the constituent's goal or benefit assignment.

Make It Easier for Caseworkers to Access Goal Assignment and Benefit Assignment Records

Allow users to access goal assignment and benefit assignment records based on access to a parent record. For instance, if there's a parent-child relationship between a care plan and a goal assignment or benefit assignment, anyone who has access to the parent care plan can automatically access the child goal assignment and benefit assignment, as well.

SEE ALSO:

Care Plans in Public Sector Solutions

Create More Detailed Care Plans

More easily add and review enrollee information when assigning benefits and goals to care plans. Use custom fields to customize the guided flow to suit your organization's needs.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: Use custom fields to customize the guided flow to suit your organization's needs. For example, you can use a custom field Care Plan Type to define a primary and a secondary care plan.

SEE ALSO:

Care Plans in Public Sector Solutions

Add Custom Fields to a Care Plan

Add Tasks to Care Plans

Define tasks for care plans, benefits, and goals in a template so that you can easily reuse them. Only see the tasks that are relevant to the care plans, benefits, and goals that you're working on, and update multiple tasks at once. See upcoming and overdue tasks on the constituent's goal or benefit assignment.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Create Tasks for Care Plans with Action Plan Templates

Make It Easier for Caseworkers to Access Goal Assignment and Benefit Assignment Records

Allow users to access goal assignment and benefit assignment records based on access to a parent record. For instance, if there's a parent-child relationship between a care plan and a goal assignment or benefit assignment, anyone who has access to the parent care plan can automatically access the child goal assignment and benefit assignment, as well.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Give Caseworkers Access to Goal Assignments and Benefit Assignments Related to Care Plans

Get More of Your Org Configured Easily with Guided Setup

Set up more aspects of your Public Sector Solutions org easily with new Guided Setup assistants. Now you can follow simple, clear steps to configure inspection management, analytics, and case management so that your users can be productive faster. Click links to Help articles to get more information for any setup task.

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 new assistants.

- **Set Up Inspection Management**: Design detailed assessment questions and tasks.
- **Set Up Analytics**: Set up CRM Analytics to gather intelligent insights that help you to improve internal productivity and increase constituent satisfaction.
- **Set Up Case Management**: Enable care plans and benefit management so that caseworkers can help constituents with custom care plans created from reusable care plan templates.

How: From Setup in the Quick Find box, enter `Guided Setup`. Then, select an assistant to begin.

Decision Explainer for Constituents

Give constituents insights into fee calculations, eligibility determinations, and benefit calculations, and share the reasoning behind application decisions. Understanding the reasons behind decisions builds trust and can help the constituent successfully reapply for a license, permit, program, or service.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Share Decision Explanations with Constituents

New and Changed Objects in Public Sector Solutions

Do more with these new and changed Public Sector Solutions objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Store information on client referrals in an organization
Use the new Referral object.

Indicates a junction between an action plan template's version and a target object such as Care Plan Template, Benefit, or Goal Definition associated with them
Use the new ActionPlanTemplateAssignment object.

Store information about a group of people either affiliated with each other or living together such as a household
Use the new PartyRelationshipGroup object.

Add a job status and a job status message to your tasks
Use the new TaskJobStatus and TaskJobStatusMessage fields in the CarePlan object.

Indicate whether your reporter is confidential and add a reporter category, reporter organization, and reporter address
Use the new IsReporterConfidential, ReporterCategory, ReporterOrganization, and ReporterAddress fields in the PublicComplaint object.

Indicate a primary group, a primary contact of the group, and whether the data of a group is included in the household and also, specify the categories in which the data associated with a group is aggregated
Use the new IsPrimaryGroup, IsPrimaryMember, IsIncludedinGroup, and DataRollupCategories fields in the AccountContactRelation object.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Public Sector Solutions Connect REST APIs.

IN THIS SECTION:

New and Changed Connect REST API Resources
These resources are new or have changes.

Changed Connect REST API Request Bodies
These request bodies have changes.

Changed Connect REST API Response Bodies
These response bodies have changes.

SEE ALSO:

Public Sector Solutions Developer Guide: Public Sector Solutions APIs (can be outdated or unavailable during release preview)

New and Changed Connect REST API Resources

These resources are new or have changes.

Care Plans

Retrieve care plan definitions
Make a GET request to the new `/connect/careplan/definitions/${`***definitionId***`}` resource.

New response body: Care Plan Definition Output

Update a care plan record

Make a PATCH request to the new `/connect/careplan/care-plans/${`***`{carePlanId}`***`}` resource.

New request body: Care Plan Input

New response body: Generic Output

Changed Connect REST API Request Bodies

These request bodies have changes.

Create Care Plans

Care Plan Input

This request body has these new properties.

- `carePlanTasks`—Task details for a care plan.
- `customFields`—Custom fields for a care plan.

Changed Connect REST API Response Bodies

These response bodies have changes.

Retrieve the Care Plan Template Details

Care Plan Template

This response body has this new property.

- `associatedActionPlanTemplates`—List of the associated action plan templates.

Retrieve the Care Plan Details

Care Plan Output

This response body has these new properties.

- `carePlanTasks`—Tasks for a care plan.
- `customFields`—Custom fields for a care plan.

Net Zero Cloud

Exceed your business goals by tracking your loaded reference data, managing carbon credits, and monitoring water-related activities. You can also calculate a supplier's quantity-based emissions and set object-level permissions.

IN THIS SECTION:

Enhance Reference Data Loading

Load specific versions of the reference datasets without having to reload historic datasets that were loaded earlier. You can now track the reference dataset versions that were already loaded quickly and easily and identify the new dataset versions available.

Enhance Reference Data Loading

Load specific versions of the reference datasets without having to reload historic datasets that were loaded earlier. You can now track the reference dataset versions that were already loaded quickly and easily and identify the new dataset versions available.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Net Zero Cloud.

Why: Previously, in the Load Reference Data feature, you couldn't load new versions of the reference datasets or select the datasets that you want to load. You had to load all the datasets together even if you aren't going to use the emissions factors associated with the dataset. There was no indication that the data was already loaded and loading the entire dataset again led to data duplication.

Now, you can:

- Load emissions factors in a particular dataset version depending on your carbon accounting needs.

- Load specific versions of the datasets without reloading any previously loaded historic datasets.

- Track the versions of the loaded reference datasets. Starting Winter '23, you can track the reference data that is loaded from the Winter '23 release onwards. You can view the dataset version history and check if any new versions are available to be loaded from specific data sources.

- View details of a dataset version shipped by Net Zero Cloud, including data source, update year, publish date, and release date.

- Reload the original versions of the previously loaded reference dataset that you may have customized by reloading the dataset from the specific dataset source.

Verify the Salesforce release name for the particular dataset to see if the dataset is already loaded. If the release name is Spring '22, the dataset is shipped earlier and is possibly already loaded. Go to the corresponding emissions factor entities to see if the data is already available. If the release name is Winter '23, a new version of the dataset is available from the standard body and is being shipped by Net Zero Cloud.

How: From Setup, in Feature Settings, under Net Zero, select **Load Reference Data**. To load the specific version of the dataset, in a dataset section, such as Electricity Emission Factors, click **Load New Dataset Version**.

SEE ALSO:

    Salesforce Help: Load Reference Data(can be outdated or unavailable during release preview)

Manage Water-Related Activities

Create and track your water-related activities such as consumption, withdrawal, and discharge. Manage your organization's water footprint for reporting to local bodies or for corporate requirements, and strategize better with actionable data. Additionally, you can engage with suppliers to collect their water-related activity data.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: Only users with a Water Accounting User user permission can create the water-related activities to track water-related data, and calculate water footprints.

How: To track water-related activities and calculate related footprint in your org, from Setup, in the Quick Find box, enter `Net Zero`, and then select **Net Zero Settings**. Turn on **Manage Water Accounting**.

SEE ALSO:

    Salesforce Help: Manage Your Water Footprint(can be outdated or unavailable during release preview)

Allocate Carbon Credits to Offset Unavoidable Emissions

Carbon credits are verified greenhouse gas (GHG) emissions reduction activities that remove greenhouse gases from the atmosphere, or avoid the new emissions of greenhouse gases. Organizations purchase carbon credits to fund GHG reduction and removal and help balance their unavoidable GHG emissions. Now you can track the credits that you purchase from various sources in Net Zero Cloud and allocate them to offset unavoidable emissions.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud Growth license is enabled.

Who: Only users with a Carbon Credit Allocation user permission can allocate carbon credits to offset the emissions inventory.

Why: In Net Zero Cloud, you can gain insight into carbon credit projects and the project's impact. You can review your annual emissions inventory and estimate the carbon credits required to partially or fully offset your emissions. You can then allocate carbon credits purchased from the carbon credit projects towards granular emission activities in the inventory. You can also visualize the impact on the cost due to ongoing carbon projects and review the annual emissions and carbon credits allocated to offset the unavoidable emissions.

How: To allocate carbon credits to offset the emissions inventory in your org, from Setup, in the Quick Find box, enter `Net Zero`, and then select **Net Zero Settings**. Turn on **Allocate Carbon Credits**.

Set Object-Level Permissions for Net Zero Objects

To improve the security of your data, only users who have created records in Net Zero Cloud can view or modify those records. They can't view or modify records created by other users. Additionally, users who haven't created the record or who have View All access to the record can't see the lock, unlock, recalculate, allocate final scorecard, or associate procurement items in the quick actions menu. With this change, to view or modify records created by other users, you must request that your Salesforce administrator grants View All or Modify All access to users for these objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Net Zero Cloud.

Why: Previously, users with the Net Zero Cloud Manager permission set were able to view, modify, or delete the records that they created and those created by other users. This means users were able to modify or delete records that aren't required for their business needs.

Now, only users with the Net Zero Cloud Manager permission set who have created the object records can view or modify those records. To enable a user to view or modify records created by other users, your Salesforce administrator must grant the View All or Modify All access for the user on the required objects. Alternatively, your Salesforce administrator can manage object permissions by using organization-wide defaults or sharing rules.

All users can view some object records, such as the emissions factors and inflation rates. Users with the Net Zero Cloud Auditor permission set can view records for all the Net Zero Cloud objects.

By default, only your Salesforce administrator can delete records. However, you can delete records if you have Modify All access or your Salesforce administrator can grant delete access to users for the objects.

How: To enable a user with the Net Zero Cloud Manager permission set to view or modify object records created by other users, clone the Net Zero Cloud Manager permission set. Then enable the View All or Modify All option for the required objects, and assign the cloned permission set to the user.

Calculate Emissions Based On Supplier Quantity

Collect and calculate product-level emissions factors based on quantity from suppliers and general industries resources to calculate emissions for Scope 3, Category 1: Purchased Goods and Services. Calculating emissions based on supplier quantity improves the accuracy and granularity of the Scope 3 accounting and also provides data for more sustainable sourcing choices.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Net Zero Cloud.

Why: Previously, you were able to only calculate supplier emissions from spend-based calculations on the procurement item or from collecting data from suppliers using the sustainability scorecard. Now, when you use the quantity-based method to calculate emissions for goods and services, you use an emissions factor for each product unit purchased. For example, instead of calculating steel per dollar spent, you can calculate tons of steel purchased multiplied by specific steel emissions factor. You can collect these factors from suppliers or use industry or generic factors.

By using the quantity-based method, the emission calculation considers the supplier's per-unit emissions for the goods and services procured. The quantity-based emissions data can be specific to the individual supplier and the products the supplier sells to your

company. For example, if a supplier's emissions are low but the cost of the goods procured is high, then this method shows your emissions are low and that the supplier is sustainable because of the low emissions per unit quantity that is procured.

SEE ALSO:

Salesforce Help: Calculate Emissions Based On Quantity or Spending(can be outdated or unavailable during release preview)

Salesforce Help: Create a Scope 3 Procurement Item Record(can be outdated or unavailable during release preview)

Salesforce Help: Create a Product Emissions Factor Record(can be outdated or unavailable during release preview)

Reduce Your Company's Carbon Footprint from Air Travel

Get predictions about your company's carbon emissions from air travel. Reduce your company's carbon emissions by analyzing the top factors that contribute to the emissions and by reviewing the recommendations to decrease the emissions. You can filter the predictions data by year, employee country, cost center, fuel type, and stationary asset type.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Net Zero Cloud.

Who: The Net Zero CRM Analytics templates is available to users with the Tableau CRM for Net Zero Analytics add-on license.

How: Go to CRM Analytics Studio, click **Create**, and then select **App**.

- To use external data for predicting carbon emissions from air travel, select the **External Data to Predict Air Travel Emissions** template.

- To get predictions about carbon emissions from air travel, select the **Prediction of Air Travel Emissions** template.

The Predicted Air Travel Emissions dashboard shows details of the predicted carbon emissions for your company based on the selected employee country and cost center.

SEE ALSO:

Salesforce Help: Get Carbon Emission Predictions from Air Travel (can be outdated or unavailable during release preview)

Salesforce Help: Use the Net Zero Analytics App(can be outdated or unavailable during release preview)

Net Zero Analytics to Monitor Carbon Credits and Water Management

Net Zero Analytics has new dashboards to monitor your sustainability efforts in carbon credit allocation and water management. The Carbon Credit dashboard analyzes and provides insights into current net emissions, carbon projects, and the impact of overall carbon allocation for each scope. Use the Water Management dashboard to get insights into the water management efforts of your company over the years across multiple locations and assets to analyze the water risk.

IN THIS SECTION:

[Track Carbon Credit Allocation](#)

Use the new Carbon Credit dashboard to get an overall picture of your carbon credits allocated or retired for a year based on each activity and scope. Sustainability managers can track the different carbon projects in a year, the carbon credits allocated for each project, and the cost efficiency of the projects.

[Get Deeper Insights into Water Management](#)

Use the Water Management dashboard to get insights into your company's water management efforts based on consumption, withdrawal, and discharge. Quickly assess your organization's water intensity based on employees and analyze the water risk at the various locations where you have assets.

Track Carbon Credit Allocation

Use the new Carbon Credit dashboard to get an overall picture of your carbon credits allocated or retired for a year based on each activity and scope. Sustainability managers can track the different carbon projects in a year, the carbon credits allocated for each project, and the cost efficiency of the projects.

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.

Get Deeper Insights into Water Management

Use the Water Management dashboard to get insights into your company's water management efforts based on consumption, withdrawal, and discharge. Quickly assess your organization's water intensity based on employees and analyze the water risk at the various locations where you have assets.

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.

New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

Here are the changed data objects in Net Zero Cloud.

Track water-related activities

- Use the new EnvironmentalRisk fields of the StnryAssetEnvrSrc object
- Use the new OrgWaterAllocPct, WaterConsumptionValue, WaterDischargeValue, WaterWithdrawalValue, WithdrawalUnit, ConsumptionUnit, DischargeUnit, SupplierWaterActvtyType, SupplierAnnlRevenuePct, AllocatedWaterCnsmpInM3, AllocatedWaterDchgInM3, AllocatedWaterWdrwInM3, and WaterCalculationMethod fields of the SustainabilityScorecard object.
- Use the picklist values added in the GeneratedWaste, WasteFootprintItem, and WstDispoEmssnFctrSetItm, and WasteFootprint objects

Additional fields introduced to existing objects

- Use the new SourceCountry, DestinationCountry, TravelerBaseCountry, SourceCity, DestinationCity, and TravelerBaseCity of the AirTravelEnrgyUse object

- Use the new fields in the WasteFootprint and AnnualEmssnInventory object
- Use the new WstDispoEmssnFctrSet of the StnryAssetEnvrSrc object
- Use the new FuelTypeRefId and FuelConsumptionUnitRefId fields of the StnryAssetEnrgyUse object

New Objects

Here are the new data objects in Net Zero Cloud.

Manage water activities related to the stationary assets
Use the new StnryAssetWaterActvty object.

Quantify intensity of water-related activities using aggregated water activity records
Use the new StnryAssetWaterFtprnt object.

Quantify intensity of individual water activities
Use the new StnryAssetWtrFtprntItm object.

Manage risks that the environmental resources create for an organization
Use the new EnvironmentalRisk object.

Manage types of stationary assets
Use the new StnryAssetAnnualFact object.

Manage environmental projects
Use the new CrbnCreditProject object.

Manage sustainability credits based on sustainability purchase
Use the new SustainabilityCredit object.

Manage allocated carbon credits to offset emissions
Use the new CrbnCreditAlloc object.

Manage carbon credit allocation and emissions related to individual emission activity
Use the new CrbnCreditAllocItem object.

Offset emissions for carbon credit allocation items
Use the new CrbnCreditDistribution object.

Manage emissions factors used to quantify emissions by a product in the supply-chain
Use the new ProductEmissionsFactor object.

Track products that are purchased from a supplier
Use the new SupplierProduct object.

Manage purchase of sustainability credits such as carbon credits
Use the new SustainabilityPurchase object.

Manage additional units of measure values defined by a customer
Use the new SustainabilityUom object.

New Net Zero Cloud Metadata Types

Make the most of the changed metadata types of Net Zero Cloud.

Metadata Types

Manage the unit of measure (UOM) values for custom fuel types
Use the new SustainabilityUom metadata type.

Industries: Common Components

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, we've enhanced filtering and performance for the data processing engine, improved monitoring for branch management, added decision tables to flows, provided templates for rebate management, added invocable actions and Apex classes for loyalty management, and much more.

IN THIS SECTION:

AI Accelerator

Integrate AI Accelerator and Next Best Actions (NBA) for your real-time use cases and show real-time predictions and NBA recommendations on one component. Use the Recommendations Connect API to get recommendations from the predictions generated for your use case.

Action Launcher

Find out whether a deployment contains OmniScripts. Determine the name of the component that's used in a deployment.

Data Processing Engine

Delete records that you don't need as part of the Data Processing Engine definition's writeback. Provider Search in Health Cloud uses Data Processing Engine for its search results.

Business Rules Engine

Use object fields as variables in an expression set by selecting the admin-created aliases for an object fields. Create explainability message templates to store element-specific explanations. Use Decision Explainer with Business Rules Engine to explain the results of business rules to your users easily. Simulate an expression set, switch to external view, and preview how your users see the decision explanations. Use customized, industry-specific business elements like other elements in an expression set. Control precisely what data to upload to a decision matrix version from a CSV file by using the new Data Upload options.

Decision Table

Save time and find the best option among outcomes quickly by setting the order in which decision tables show outcomes. Get more outcomes from your decision table every hour.

Discovery Framework

Your users can now enjoy the flexibility to import and export assessment questions, assessment question versions, and assessment question sets on multiple supported channels. They can use the new invocable action to get the summary of assessment question response and form data in a Salesforce Flow.

Einstein Relationship Insights

Get updates when Einstein finds relationship recommendations for the records that you follow. View Relationship Insights from the new Actionable Relationship Center component.

Engagement

Create, delete, or get engagement records. Do more with changed engagement objects.

Identity Verification

Access more metadata through these new and changed metadata types. Use Tooling APIs to work with the Identity Verification setup objects.

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

Store data extracted from tables in a form.

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.

Industry Integration Solutions

Accelerate integrating Salesforce Industries applications with other external systems to realize end to end business processes by using industry-specific APIs and integration assets that are deployed on MuleSoft. The integration assets are out of the box integration templates with pre-built transformations that reduce the time and cost to go live. Use the new user interface to securely connect your Salesforce and MuleSoft orgs and automate deployment of the integration assets. After deploying the asset in your MuleSoft instance, you can extend the application in MuleSoft AnyPoint Platform to match the organizational requirements and significantly reduce the time to implement and reduce extension project costs.

Get Started Faster with Guided Setups

Discover the new guided setups to extend your industries cloud with common features.

AI Accelerator

Integrate AI Accelerator and Next Best Actions (NBA) for your real-time use cases and show real-time predictions and NBA recommendations on one component. Use the Recommendations Connect API to get recommendations from the predictions generated for your use case.

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.

Get NBA Recommendations From Real-Time Predictions

Get recommendations from the Next Best Actions (NBA) strategy by using predictions that AI Accelerator generates for your real-time use cases. Provide a unified user experience by showing real-time predictions and NBA recommendations on one component.

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.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

AiAccelerator Namespace

AiAccelerator is a new namespace that includes a new interface and methods for overriding or extending the default feature extractor implementation. .

New AI Accelerator Metadata Types

Get to know the new metadata types of AI Accelerator.

AI Accelerator Has New Tooling API Objects

Use Tooling API to work with the AIAccelerator setup objects.

SEE ALSO:

Einstein Release Notes

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)

Get NBA Recommendations From Real-Time Predictions

Get recommendations from the Next Best Actions (NBA) strategy by using predictions that AI Accelerator generates for your real-time use cases. Provide a unified user experience by showing real-time predictions and NBA recommendations on one component.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions where admin settings for AI Accelerator and for the product related to the use case are enabled.

Who: To use the Accelerator—Einstein Predictions & Recommendations component, you need the CRM Plus license and the CRM license for Communications Cloud.

How: Add the AI Accelerator—Einstein Predictions & Recommendations component to a lightning page.

SEE ALSO:

> *Salesforce Help*: Show Predictions and NBA Recommendations 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)

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

Get recommendations with Einstein Next Best Action

Make a POST request to the new `/connect/aiaccelerator/recommendations` resource.

New request body: Recommendation Input

New response body: Recommendation

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)

New AI Accelerator Metadata Types

Get to know the new metadata types of AI Accelerator.

Define a machine learning use case for which real-time predictions are required

Use the new AIUsecaseDefinition metadata type.

AI Accelerator 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)

Action Launcher

Find out whether a deployment contains OmniScripts. Determine the name of the component that's used in a deployment.

IN THIS SECTION:

Changes in the RecordActionDeployment Tooling API Object
Get more details about deployments.

Changes in the RecordActionDeployment Tooling API Object

Get more details about deployments.

Determine whether the record actions deployment contains OmniScripts
Use the new `HasOmniscripts` field on the RecordActionDeployment object.

Get the name of the component used in the deployment
Use the `ComponentName` field on the RecordActionDeployment object.

Data Processing Engine

Delete records that you don't need as part of the Data Processing Engine definition's writeback. Provider Search in Health Cloud uses Data Processing Engine for its search results.

IN THIS SECTION:

Delete Records as Part of the Writeback Results
Delete records that Data Processing Engine definition runs process but you no longer need by using the Delete action in the Writeback Object node and keep your org lightweight and clean.

Get Quicker Search Results with Data Processing Engine in Provider Search
Provider Search in Health Cloud now uses Data Processing Engine to improve the performance and scalability of its search results.

Changed Data Processing Engine Metadata Type
Make the most of the changed metadata types of Data Processing Engine.
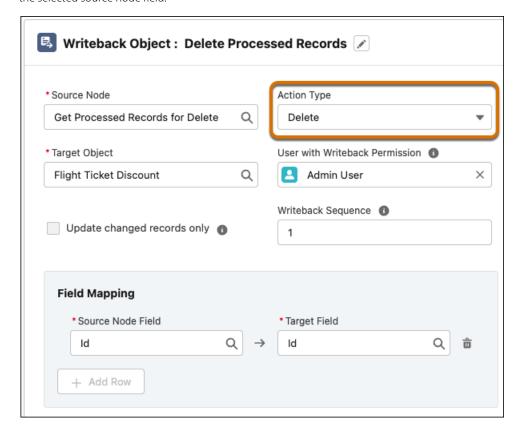
Delete Records as Part of the Writeback Results

Delete records that Data Processing Engine definition runs process but you no longer need by using the Delete action in the Writeback Object node and keep your org lightweight and clean.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Financial Services Cloud, Manufacturing Cloud, Rebate Management, Loyalty Management, or Provider Search in Health Cloud is enabled. Data Pipelines must be enabled in Salesforce.

How: On the Writeback Object node of a Data Processing Engine definition, for Action Type, select **Delete**. In Source Node Field, select a field that uniquely identifies the record that you want to delete. In Target Field, select the target object field with the same value as the selected source node field.

SEE ALSO:

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

Get Quicker Search Results with Data Processing Engine in Provider Search

Provider Search in Health Cloud now uses Data Processing Engine to improve the performance and scalability of its search results.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Provider Search in Health Cloud is enabled. Data Pipelines must also be enabled in Salesforce.

SEE ALSO:

   Enable Performance and Scalability for Provider Search (can be outdated or unavailable during release preview)

Changed Data Processing Engine Metadata Type

Make the most of the changed metadata types of Data Processing Engine.

Delete records that are no longer needed when writing back results
   Use the new `Delete` value in the existing `operationType` field of the BatchCalcJobWritebackObject subtype on the BatchCalcJobDefinition metadata type.

Business Rules Engine

Use object fields as variables in an expression set by selecting the admin-created aliases for an object fields. Create explainability message templates to store element-specific explanations. Use Decision Explainer with Business Rules Engine to explain the results of business rules to your users easily. Simulate an expression set, switch to external view, and preview how your users see the decision explanations. Use customized, industry-specific business elements like other elements in an expression set. Control precisely what data to upload to a decision matrix version from a CSV file by using the new Data Upload options.

IN THIS SECTION:

Use Object Records in Expression Sets

You can now use values from object records as variables in your expression sets. With field aliases, admin users can give user-friendly names to object fields. Object field aliases are defined in Setup and are tied to a usage type. When you select a usage type for an expression set, all object field aliases associated with the usage type are available to you. Select a field alias under an object alias, similar to how you select variables and constants that you declare in an expression set.

Use Business Elements in Expression Sets

Business elements are solution-specific, customized elements that are designed specifically for your industry's business requirements. Business elements are shipped as part of your Industries solution. When a business element is available in your org, you can add the element to an expression set and use the element like other step elements.

Explain the Results of Business Rules to Your Users

Use Decision Explainer with Business Rules Engine to show your external users the rationale behind why an expression set step generated a specific result. Decision explanations are stored in explainability message templates and are tied to specific element types.

Store Decision Explanations in Message Templates

Create and store explanations for expression set elements in explainability message templates. Messages in the explainability message templates can also be set as default for a step element. When Decision Explainer is enabled for an expression set, you can select an explainability message template that's available for an expression set step element.

Control What Data to Upload from CSV Files to Decision Matrices

With the enhanced decision matrix upload options, you can control the data to upload. Previously, when you uploaded a CSV file to a decision matrix version, duplicate input rows in the CSV file were excluded from the upload. Now, for duplicate input rows in the CSV file, you can replace the output row data in the matrix with the data in the CSV file. Or ignore the duplicate rows and add only the new rows to the matrix.

Create a Decision Matrix Version from a Selected Version

Use the New Version option on the decision matrix version record page to create a version of an existing matrix version. You can now opt to copy the entire matrix data, including rows, from the selected version to the new version. Previously, only the column headers from the matrix were copied to the new matrix by default. By using the new version creation option, you can avoid adding the row data to the new version manually or by using a CSV file.

Migrate Calculation Procedures and Calculation Matrices

Now save the time and effort of manually recreating your calculation procedures and calculation matrices. Use the migration tool. Admin users can use the migration tool to automatically migrate calculation procedures and calculation matrices from your managed packages to Business Rules Engine as expression sets and decision matrices respectively.

New Functions Supported in Expression Sets

You can now use the UP, DOWN, HALF_UP, HALF_DOWN, HALF_EVEN, CEILING, and FLOOR functions in your expression sets. These functions are used with the ROUND function and enhance the capability of the ROUND function. You can also use the CONTAIN function to check whether a list of string contains the string you specify.

New and Changed Objects in Business Rules Engine

Do more with the new and updated Business Rules Engine objects.

New and Changed Tooling API Objects in Business Rules Engine

Use Tooling APIs to work with Business Rules Engine setup objects.

New Metadata Types for Business Rules Engine

Business Rules Engine has new metadata types and enumeration.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

BusinessRule Namespace

The BusinessRule namespace has these new or changed classes and methods.

Use Object Records in Expression Sets

You can now use values from object records as variables in your expression sets. With field aliases, admin users can give user-friendly names to object fields. Object field aliases are defined in Setup and are tied to a usage type. When you select a usage type for an expression set, all object field aliases associated with the usage type are available to you. Select a field alias under an object alias, similar to how you select variables and constants that you declare in an expression set.

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: To create object and field aliases, users need Business Rules Engine admin permissions. To use field aliases as variables in expression sets, users need the Rules Engine Designer permission set.

Use Business Elements in Expression Sets

Business elements are solution-specific, customized elements that are designed specifically for your industry's business requirements. Business elements are shipped as part of your Industries solution. When a business element is available in your org, you can add the element to an expression set and use the element like other step elements.

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.

Explain the Results of Business Rules to Your Users

Use Decision Explainer with Business Rules Engine to show your external users the rationale behind why an expression set step generated a specific result. Decision explanations are stored in explainability message templates and are tied to specific element types.

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: First, modify the configuration of an expression set version to show explanations to external users. Next, select an explainability message template for the expression set element for which you want to show an explanation. Finally, to preview how your users see the explanations, simulate the expression set and then switch to the external view.

Store Decision Explanations in Message Templates

Create and store explanations for expression set elements in explainability message templates. Messages in the explainability message templates can also be set as default for a step element. When Decision Explainer is enabled for an expression set, you can select an explainability message template that's available for an expression set step element.

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: To create explainability message templates, users need Business Rules Engine admin permissions. To use explainability message templates for expression set step elements, users need the Rules Engine Designer permission set.

Control What Data to Upload from CSV Files to Decision Matrices

With the enhanced decision matrix upload options, you can control the data to upload. Previously, when you uploaded a CSV file to a decision matrix version, duplicate input rows in the CSV file were excluded from the upload. Now, for duplicate input rows in the CSV file, you can replace the output row data in the matrix with the data in the CSV file. Or ignore the duplicate rows and add only the new rows to the matrix.

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Use the New Version option on the decision matrix version record page to create a version of an existing matrix version. You can now opt to copy the entire matrix data, including rows, from the selected version to the new version. Previously, only the column headers from the matrix were copied to the new matrix by default. By using the new version creation option, you can avoid adding the row data to the new version manually or by using a CSV file.

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.

Migrate Calculation Procedures and Calculation Matrices

Now save the time and effort of manually recreating your calculation procedures and calculation matrices. Use the migration tool. Admin users can use the migration tool to automatically migrate calculation procedures and calculation matrices from your managed packages to Business Rules Engine as expression sets and decision matrices respectively.

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 Functions Supported in Expression Sets

You can now use the UP, DOWN, HALF_UP, HALF_DOWN, HALF_EVEN, CEILING, and FLOOR functions in your expression sets. These functions are used with the ROUND function and enhance the capability of the ROUND function. You can also use the CONTAIN function to check whether a list of string contains the string you specify.

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 the new and updated Business Rules Engine objects.

View information about object and field aliases used in expression sets
Use the new ExpsSetObjectAliasFieldVw object.

Show element-specific rule explanations to external users
Use the new `ShouldShowExplExternally` field in the ExpressionSetVersion object.

New and Changed Tooling API Objects in Business Rules Engine

Use Tooling APIs to work with Business Rules Engine setup objects.

Store information about the alias defined for a source object referenced in expression sets
Use the new ExpressionSetObjectAlias object.

Add an API name for a decision matrix version
Use the new `ApiName` field in the CalculationMatrixVersion object.

New Metadata Types for Business Rules Engine

Business Rules Engine has new metadata types and enumeration.

Metadata Type

Represents information about the alias defined for a source object used in expression sets
Use the new ExpressionSetObjectAlias metadata type.

Represents information about the explainability message template for a specified expression set step element
Use the new ExplainabilityMsgTemplate metadata type.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

Retrieve a list of explainability message templates that match the search criteria
Make a GET request to the new `/connect/business-rules/explainability/message-templates` resource.

New request parameters: `searchKey, isDefault, stepType, messageType`

New response body: Message Templates List

Retrieve explainability message template details for a specified template ID
Make a GET request to the new
`/connect/business-rules/explainability/message-templates/$`***{messageTemplateId}***`resource.

New response body: Message Templates Detail

Retrieve explainability logs for expression set steps that have explanation messages configured
Make a GET request to the new `/connect/business-rules/explainability/logs` resource.

New request parameters: `actionContextCode, applicationType, applicationSubType, processType, createdAfter, createdBefore, pageSize, queryMore`

New response body: Explainability Logs

BusinessRule Namespace

The BusinessRule namespace has these new or changed classes and methods.

New Classes

Migrate calculation matrices from the Vlocity package to the Business Rules Engine as decision matrices
Use the new `BusinessRule.CalculationMatrixMigrationService` class, which includes these methods.

- `migrate(calculationMatrixIds, namespace)`
- `migrate(calculationMatrixId, namespace)`

Migrate calculation procedures from the Vlocity package to the Business Rules Engine as expression sets

Use the new `BusinessRule.CalculationProcedureMigrationService` class, which includes these methods.

- `migrate(calcProcedureIds, namespace)`
- `migrate(calcProcedureId, namespace)`

Decision Table

Save time and find the best option among outcomes quickly by setting the order in which decision tables show outcomes. Get more outcomes from your decision table every hour.

IN THIS SECTION:

Save Time While Finding the Best Outcome

Use an input or output field of a decision table to specify the order in which the decision table provides outcomes. Sort outcomes based on whether the value of a field is blank in the record that contains an outcome. Then, choose whether outcomes are sorted by ascending or descending order of the value stored in the sort by field of the outcomes' records. If a decision table's run finds multiple outcomes, the decision table adds the first outcome based on the sort order in the Single Outcome output field. Storing the first outcome in the Single Output field saves admins the time taken to process the outcomes further to find the best outcome.

Get More Outcomes From Your Decision Tables Every Hour

Decision tables that evaluate less than 10,000 business rules can now cumulatively provide 500,000 outcomes every hour. Decision tables that evaluate more than 10,000 business rules can now cumulatively provide up to 50,000 outcomes per hour. To get up to 1.5 million outcomes per hour from decision tables that evaluate less than 10,000 business rules, group the business rules in the decision table. If you group business rules for decision tables that evaluate more than 10,000 business rules, you get up to 150,000 outcomes per hour.

Changed Tooling API Objects in Data Table

Use Tooling APIs to work with the Decision Table setup objects.

Changed Decision Table Metadata Types

Make the most of the changed metadata type of Decision Table.

Save Time While Finding the Best Outcome

Use an input or output field of a decision table to specify the order in which the decision table provides outcomes. Sort outcomes based on whether the value of a field is blank in the record that contains an outcome. Then, choose whether outcomes are sorted by ascending or descending order of the value stored in the sort by field of the outcomes' records. If a decision table's run finds multiple outcomes, the decision table adds the first outcome based on the sort order in the Single Outcome output field. Storing the first outcome in the Single Output field saves admins the time taken to process the outcomes further to find the best outcome.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Why: For example, a company uses a decision table to determine the discount for flight tickets based on the source and the destination of a flight. The decision table provides multiple outcomes because some of the discount rules don't have values for the source or the destination. The decision table is sorted based on the source. The outputs are provided in descending order. The outcomes whose record has a blank value for the source is provided last. The sorting ensures that a customer receives the highest discount percentage possible for the source or the destination.

How: From Setup, in the Quick Find box, enter *Decision Table*, and then select **Decision Table**. Click **New**. Name the decision table and select the source object. Click **Next**. Select the input and output fields of the decision table. Select the sort order for the input or output field based on which outcomes are sorted. Click **Next**. Group business rules if necessary, and then save your changes.

Get More Outcomes From Your Decision Tables Every Hour

Decision tables that evaluate less than 10,000 business rules can now cumulatively provide 500,000 outcomes every hour. Decision tables that evaluate more than 10,000 business rules can now cumulatively provide up to 50,000 outcomes per hour. To get up to 1.5 million outcomes per hour from decision tables that evaluate less than 10,000 business rules, group the business rules in the decision table. If you group business rules for decision tables that evaluate more than 10,000 business rules, you get up to 150,000 outcomes per hour.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management or Loyalty Management is enabled.

Changed Tooling API Objects in Data Table

Use Tooling APIs to work with the Decision Table setup objects.

Sort business rules in a decision table based on an input or output field value

Use the new `SortType` field of the DecisionTableParameter object.

Changed Decision Table Metadata Types

Make the most of the changed metadata type of Decision Table.

Sort the business rules in a decision table

Use the `sortType` field on the DecisionTableParameters subtype of the DecisionTable metadata type.

Discovery Framework

Your users can now enjoy the flexibility to import and export assessment questions, assessment question versions, and assessment question sets on multiple supported channels. They can use the new invocable action to get the summary of assessment question response and form data in a Salesforce Flow.

IN THIS SECTION:

Discovery Framework Metadata Types (Generally Available)

The Discovery Framework metadata APIs to import and export assessment questions, assessment question versions, and assessment question sets are now generally available.

New Invocable Actions

You can use the new invocable actions in a Salesforce Flow.

Use the Assessments Component to Collect User Data Efficiently
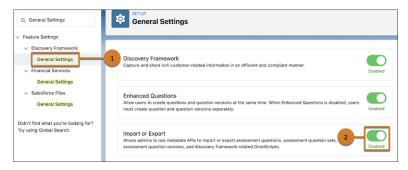
To have a complete view of Discovery Framework assessments, add the Assessments component to your record pages. Customize the tab labels and displayed fields to meet your business needs. Start and resume an assessment from the page.

Discovery Framework Metadata Types (Generally Available)

The Discovery Framework metadata APIs to import and export assessment questions, assessment question versions, and assessment question sets are now generally available.

Where: This change applies to Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** editions where a Financial Services Cloud is enabled, or in **Enterprise** and **Unlimited** editions where the Health Cloud license is enabled.

How:

From Setup, in the Quick Find box, enter `General Settings`, and then under Discovery Framework, select **General Settings** (1). Enable **Import or Export** (2).

New Invocable Actions

You can use the new invocable actions in a Salesforce Flow.

Get a specified assessment's responses and form metadata

Use the new `getAssessmentResponseSummary` invocable action.

Use the Assessments Component to Collect User Data Efficiently

To have a complete view of Discovery Framework assessments, add the Assessments component to your record pages. Customize the tab labels and displayed fields to meet your business needs. Start and resume an assessment from the page.

Where: This change applies to Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** editions where a Financial Services Cloud is enabled, or in **Enterprise** and **Unlimited** editions where the Health Cloud license is enabled.

Why: Administering assessments and viewing the collected results is easy with an assessments component directly on a record page. Powerful sorting options help you find the exact assessment needed and quickly input responses from the user all in one screen. Easily view complete and incomplete assessments.

How: Configure the Assessments component in Lightning App Builder. In the Properties pane, change the default **Tab Label** options and save your changes. You can also customize the fields shown in the list views of the Assessments component.

Einstein Relationship Insights

Get updates when Einstein finds relationship recommendations for the records that you follow. View Relationship Insights from the new Actionable Relationship Center component.

IN THIS SECTION:

See Einstein's Relationship Recommendations on Your Home Page

Keep sales reps updated on critical information related to the records that they follow. Add the Einstein Relationship Insights Digest component so that your sales reps can get recommendations on the home page. Sales reps can explore the new relationships to get more context on their prospects and contact the prospects at the ideal time.

[View Relationship Insights With the New ARC Einstein Relationship Insights](#)

Build stronger customer relationships with deeper relationship insights by using the new ARC Einstein Relationship Insights component. Show web recommendations for account or contact records as smart tags or a graph.

SEE ALSO:

[Einstein Release Notes](#)

See Einstein's Relationship Recommendations on Your Home Page

Keep sales reps updated on critical information related to the records that they follow. Add the Einstein Relationship Insights Digest component so that your sales reps can get recommendations on the home page. Sales reps can explore the new relationships to get more context on their prospects and contact the prospects at the ideal time.

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

Who: To see relationship updates on your home page, you need the ERI Growth User or ERI Starter User license.

SEE ALSO:

Salesforce Help: Add the Einstein Relationship Insights Digest Component to the Home Page (can be outdated or unavailable during release preview)

View Relationship Insights With the New ARC Einstein Relationship Insights

Build stronger customer relationships with deeper relationship insights by using the new ARC Einstein Relationship Insights component. Show web recommendations for account or contact records as smart tags or a graph.

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

Who: To view the ARC Einstein Relationship Insights component, users need the Financial Services Cloud Extension permission set and the ERI Growth User or ERI Starter User license.

How: Add the ARC Einstein Relationship Insights component to the record pages where you added the ARC Relationship Graph component.

SEE ALSO:

Financial Services Cloud Administrator Guide: Create and View Custom ARC Relationship Graphs (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Einstein Relationship Insights on ARC (can be outdated or unavailable during release preview)

Engagement

Create, delete, or get engagement records. Do more with changed engagement objects.

IN THIS SECTION:

[Engagement Connect REST API](#)

Create, delete, or get an engagement attendee, interaction, or topic.

[New and Changed Objects](#)

Access more data through these changed engagement objects.

Engagement Connect REST API

Create, delete, or get an engagement attendee, interaction, or topic.

Create an engagement attendee, interaction, and topic record
Make a POST request to the new `/connect/service-excellence/engagement-interactions` resource.

New request body: Engagements Create Input

New response body: Engagement Interaction Create Output

Delete an engagement attendee, interaction, and topic record
Make a DELETE request to the new
`/connect/service-excellence/engagement-interactions/{engagementInteractionId}` resource.

Get an engagement attendee, interaction, and topic record
Make a GET request to the new
`/connect/service-excellence/engagement-interactions/{engagementInteractionId}` resource.

New response body: Engagement Interaction Fetch Output

New and Changed Objects

Access more data through these changed engagement objects.

Connect an engagement attendee to either an engagement interaction or a voice call
Use the updated `EngagementId` field on the EngagementAttendee object. The field is now required.

Specify either the external or the internal attendee of an engagement interaction
Use the updated `ExternalAttendeeId` or `InternalAttendeeId` field on the EngagementAttendee object. You must specify the value of at least one of these fields.

Indicate whether an initiating attendee is authenticated
Use the new `IsAuthenticated` field on the EngagementAttendee object.

Indicate whether an initiating attendee is verified
Use the new `IsVerified` field on the EngagementAttendee object.

Indicate the role of an engagement attendee
Use the new `Role` field on the EngagementAttendee object.

Specify the time an engagement attendee is verified for an engagement interaction
Use the new `VerificationTime` field on the EngagementAttendee object.

Set the time an engagement attendee was verified
Use the updated `AttendeeVerificationTime` field on the EngagementInteraction object.

Configure custom channels of communication between a customer and a CSR or CCA
Use the updated `CommunicationChannel` field on the EngagementInteraction object. The field is now required.

BEHAVIOR CHANGE: Auto-calculate the duration of an engagement interaction by updating the end time
Use the `Duration` field on the EngagementInteraction object. The field is now Read-only.

Store the reason for an engagement interaction
Use the new `Reason` field on the EngagementInteraction object.

Configure custom values to indicate how an initiating attendee feels about an engagement interaction
Use the updated `Sentiment` field on the EngagementInteraction object.

Configure custom values to indicate the status of an engagement interaction
Use the updated `Status` field on the EngagementInteraction object.

Configure custom values to indicate the type of an engagement interaction

Use the updated `Type` field on the EngagementInteraction object.

Connect an engagement topic to either an engagement interaction or a voice call

Use the updated `EngagementId` field on the EngagementTopic object. The field is now required.

Summarize an engagement interaction

Use the new `InteractionSummary` field on the EngagementTopic object.

Configure custom reasons for the failure of an identity verification process

Use the updated `ProcessFailureReason` field on the EngagementTopic object.

Configure custom status values of a process run during an engagement interaction

Use the updated `ProcessStatus` field on the EngagementTopic object.

Identity Verification

Access more metadata through these new and changed metadata types. Use Tooling APIs to work with the Identity Verification setup objects.

IN THIS SECTION:

New and Changed Metadata Types

Access more metadata through these new and changed metadata types.

Tooling API New and Changed Objects

Use Tooling APIs to work with the Identity Verification setup objects.

New and Changed Metadata Types

Access more metadata through these new and changed metadata types.

Configure more than two levels of identity verification

Use the new `LinkedIdVerfProcessDetId` field on the existing IdentityVerificationProcDtl metadata type.

Specify the type of data in an external data source field

Use the new `FieldDataType` field on the `IdentityVerificationProcFld` object existing IdentityVerificationProcFld metadata type.

Display additional and required verifiers from parent objects of the object configured for verification

Use the new `FieldType` field on the existing IdentityVerificationProcFld metadata type.

Filter search results using the FieldName field

Use the new `searchFilter` value in the `FieldType` field on the IdentityVerificationProcFld metadata type.

Tooling API New and Changed Objects

Use Tooling APIs to work with the Identity Verification setup objects.

Configure more than two levels of identity verification

Use the new `LinkedIdVerfProcessDetId` field on the existing IdentityVerificationProcDtl object.

Specify the type of data in an external data source field

Use the new `FieldDataType` field on the existing IdentityVerificationProcFld object.

Display additional and required verifiers from parent objects of the object configured for verification

Use the new `FieldType` field on the existing IdentityVerificationProcFld object.

Filter search results using the FieldName field

Use the new `searchFilter` value in the `FieldType` field on the existing IdentityVerificationProcFld object.

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.

Refine Data Extraction by Using Record Type Field Mapping

Map extracted form fields to a target object's record type fields. For example, map form fields to the Utilization Management record type of the Case object. When a document is uploaded, Intelligent Document Reader creates a Case record with the Utilization Management record type. This record stores the information extracted from the uploaded document. You can map form fields to multiple record type 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

Intelligent Document Reader performs additional processing after extraction 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.

SEE ALSO:

Einstein Release Notes

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: Intelligent Document Reader is available 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
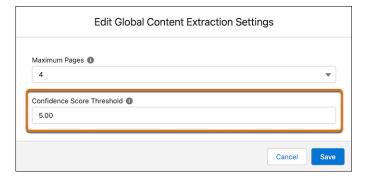
Improve Data Extraction Efficiency by Using Confidence-Level Scores

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: Intelligent Document Reader is available 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**. 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
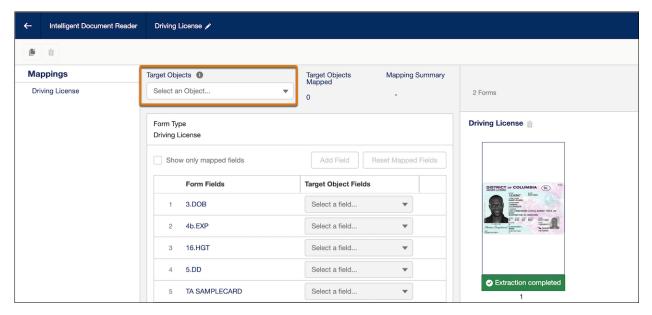
Set Up Data Extraction Easily with Multiple Target Objects in Mappings

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: Intelligent Document Reader is available 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.

SEE ALSO:

  Salesforce Help: Map Form Fields to Target Object Fields
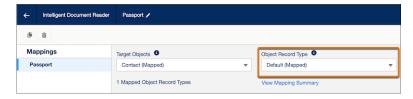
Refine Data Extraction by Using Record Type Field Mapping

Map extracted form fields to a target object's record type fields. For example, map form fields to the Utilization Management record type of the Case object. When a document is uploaded, Intelligent Document Reader creates a Case record with the Utilization Management record type. This record stores the information extracted from the uploaded document. You can map form fields to multiple record type fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Financial Services Cloud and Health Cloud with Intelligent Document Reader.

When: You can map form fields to a target object's record type fields from October 19, 2022.

How: Create or open a mapping on the Intelligent Document Reader Setup page. Select a form's page, select a target object, and then select a record type of the target object. Map the form fields to the selected record type fields.

SEE ALSO:

Salesforce Help: Map Form Fields to Target Object Fields

Share Form Fields Across Mappings for Document Type
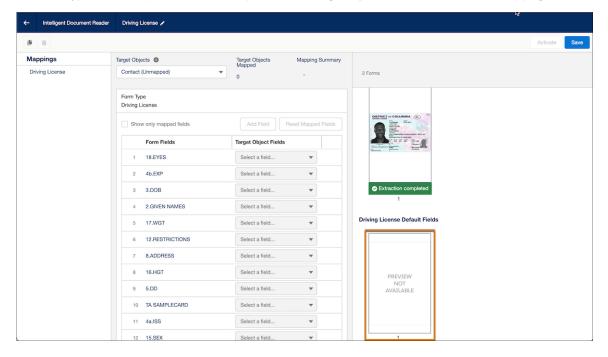
In the absence of a sample document, you can create mappings that share fields defined for a document type. You can also reuse previous mappings because the fields get automatically associated with the document type.

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: Intelligent Document Reader is available 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.
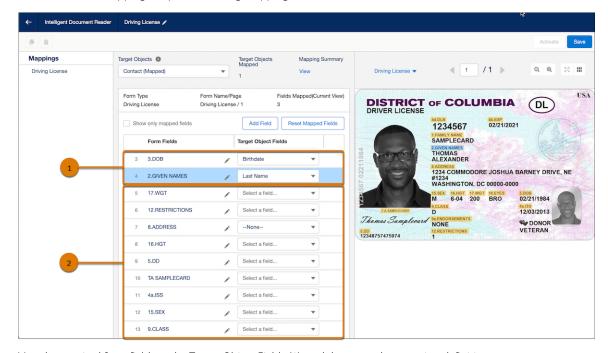
Save Your Partially Mapped Form Fields

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: Intelligent Document Reader is available 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).
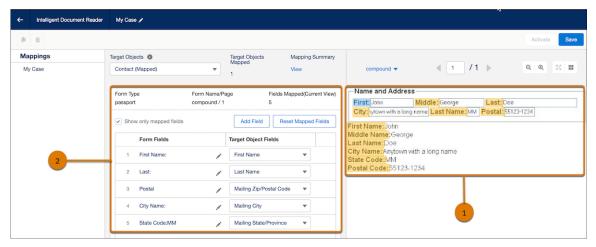
Enhanced Form Field Mapping

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: Intelligent Document Reader is available 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

Intelligent Document Reader performs additional processing after extraction 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: Intelligent Document Reader is available 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.
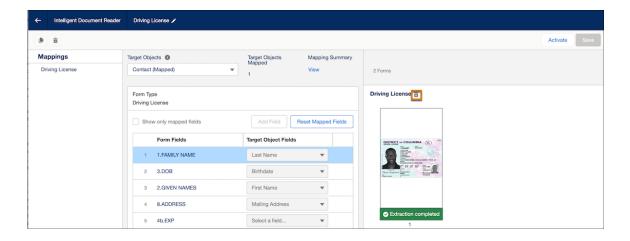
Refine Mappings by Deleting Unnecessary Forms

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: Intelligent Document Reader is available 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
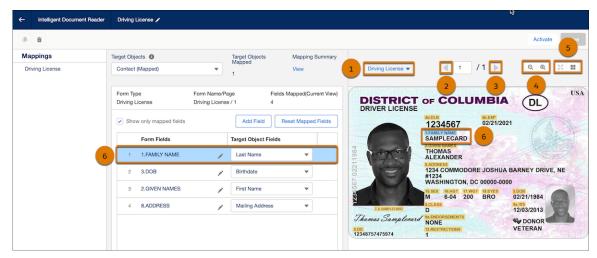
Navigation Easily Between Form Pages

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: Intelligent Document Reader is available 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: Intelligent Document Reader is available with Financial Services Cloud and Health Cloud from July 19, 2022.

Intelligent Document Reader Has New and Changed Objects

Use standard objects to create, update, and activate Intelligent Document Reader.

When: Intelligent Document Reader is available with Financial Services Cloud and Health Cloud from July 19, 2022.

New Objects

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 OcrSampleDocumentPageItem 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.

New and Changed Objects in Winter '23

New Object in Winter '23

View information about fields that define an item in the OCR sample document page
    Use the new `OcrSampleDocumentPageItem` object.

Changed Objects in Winter '23

View the JSON string from the OCR service response containing data extracted from items in the document
    Use the new `ExtractedItemData` field on the existing OcrDocumentScanResult object.

View the column number of the cell storing the OCR sample document field's value
    Use the new `CellColumnNumber` field on the existing OcrSampleDocumentField object.

View the number of columns that the cell storing the OCR sample document field's value must span

Use the new `CellColumnSpanValue` field on the existing OcrSampleDocumentField object.

View the row number of the cell storing the OCR sample document field's value

Use the new `CellRowNumber` field on the existing OcrSampleDocumentField object.

View the number of rows that the cell storing the OCR sample document field's value must span

Use the new `CellRowSpanValue` field on the existing OcrSampleDocumentField object.

View the item on the sample document page containing this field's value

Use the new `OcrSampleDocumentPageItemId` field on the existing OcrSampleDocumentField object.

View the type of item related to the OCR sample document field

Use the new `ItemType` field on the existing OcrSampleDocumentField object.

View the mapped record type ID of the target object

Use the new `TargetObjectRecordType` field on the existing OcrTargetObject object.

> 📝 **Note:** The TargetObjectRecordType field will be available from October 19, 2022.

View the type of the OCR target object field mapping

Use the new `Type` field on the existing OcrTargetObjFieldMapping object.

View the description of the OCR template

Use the new `Description` field on the existing OcrTemplate 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.

Map form fields to record type fields of the OCR target object

Use the new field `targetObjectRecordType` on the OcrTargetObject metadata type.

View the type of the OCR target object field mapping

Use the field `type` on the OcrTargetObjFieldMapping metadata type.

View the column or row number of the cell storing the OCR sample document field's value

Use the new fields `cellColumnNumber` and `cellRowNumber` on the OcrSampleDocumentField metadata type.

View the number of columns or rows that the cell storing the OCR sample document field's value must span

Use the new fields `cellColumnSpanValue` and `CellRowSpanValue` on the OcrSampleDocumentField metadata type.

View the name of the referred OCR sample document field's value

Use the new field `fieldValueName` on the OcrSampleDocumentField metadata type.

View information about fields that define an item in the OCR sample document page

Use the new field `OcrSampleDocumentPageItem` on the OcrSampleDocumentField and OcrSampleDocumentPage metadata types.

Intelligent Document Reader Has New Tooling API Objects

Use Tooling APIs to work with the Intelligent Form Reader setup objects.

When: Intelligent Document Reader is available with Financial Services Cloud and Health Cloud from July 19, 2022.

New Tooling API 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.

Changed Tooling API Object in Winter '23

Store information extracted from a form in a target object's record type fields
Use the new `TargetObjectRecordType` field of the OcrTargetObject object.

Connect REST API

Use Intelligent Document Reader Business APIs to automatically extract data from uploaded documents by using your AWS account and to store the data in Salesforce objects.

IN THIS SECTION:

Changed Connect REST API Response Bodies
These response bodies have changes.

Changed Connect REST API Response Bodies

These response bodies have changes.

Get OCR Templates Response

OCR Target Object Output
This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

Get OCR Template Details Response

OCR Target Object
This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

OCR Target Object Field

This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

Intelligent Form Reader

Store data extracted from tables in a form.

IN THIS SECTION:

Refine Data Extraction by Using Record Type Field Mapping

Map extracted form fields to a target object's record type fields. For example, map form fields to the Utilization Management record type of the Case object. When a document is uploaded, Intelligent Form Reader creates a Case record with the Utilization Management record type. This record stores the information extracted from the uploaded document.

Intelligent Form Reader Has New and Changed Objects

Use the new and changed objects to store extracted data from tables in a form.

Intelligent Form Reader Has New Metadata Types

Intelligent Form Reader has new metadata types.

Changed Tooling API Object in Intelligent Form Reader

Use the changed Tooling API to store information extracted from a form in a target object's record type fields.

Connect REST API

Use Intelligent Form Reader Business APIs to automatically extract data from uploaded documents and to store the data in Salesforce objects.

Refine Data Extraction by Using Record Type Field Mapping

Map extracted form fields to a target object's record type fields. For example, map form fields to the Utilization Management record type of the Case object. When a document is uploaded, Intelligent Form Reader creates a Case record with the Utilization Management record type. This record stores the information extracted from the uploaded document.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions of Financial Services Cloud, Health Cloud, and Public Sector Cloud with Intelligent Form Reader.

When: You can map form fields to a target object's record type fields from October 19, 2022.

How: Create or open a mapping on the Intelligent Form Reader Setup page. Select a form's page, select a target object, and then select a record type of the target object. Map the form fields to the selected record type fields.

SEE ALSO:

Salesforce Help: Map Form Fields to Target Object Fields

Intelligent Form Reader Has New and Changed Objects

Use the new and changed objects to store extracted data from tables in a form.

New Object

View information about fields that define an item in the OCR sample document page
Use the new OcrSampleDocumentPageItem object.

Changed Objects

View the JSON string from the OCR service response containing data extracted from items in the document
Use the new `ExtractedItemData` field on the existing OcrDocumentScanResult object.

View the column number of the cell storing the OCR sample document field's value
Use the new `CellColumnNumber` field on the existing OcrSampleDocumentField object.

View the number of columns that the cell storing the OCR sample document field's value must span
Use the new `CellColumnSpanValue` field on the existing OcrSampleDocumentField object.

View the row number of the cell storing the OCR sample document field's value
Use the new `CellRowNumber` field on the existing OcrSampleDocumentField object.

View the number of rows that the cell storing the OCR sample document field's value must span
Use the new `CellRowSpanValue` field on the existing OcrSampleDocumentField object.

View the item on the sample document page containing this field's value
Use the new `OcrSampleDocumentPageItemId` field on the existing OcrSampleDocumentField object.

View the type of item related to the OCR sample document field
Use the new `ItemType` field on the existing OcrSampleDocumentField object.

View the mapped record type ID of the target object
Use the new `TargetObjectRecordType` field on the existing OcrTargetObject object.

> Note: The TargetObjectRecordType field will be available from October 19, 2022.

View the type of the OCR target object field mapping
Use the new `Type` field on the existing OcrTargetObjFieldMapping object.

View the description of the OCR template
Use the new `Description` field on the existing OcrTemplate object.

SEE ALSO:
Industries Common Resources Developer Guide: Intelligent Form Reader Standard Objects

Intelligent Form Reader Has New Metadata Types

Intelligent Form Reader has new metadata types.

Map form fields to record type fields of the OCR target object
Use the new field `targetObjectRecordType` on the OcrTargetObject metadata type.

View the type of the OCR target object field mapping
Use the field `type` on the OcrTargetObjFieldMapping metadata type.

View the column or row number of the cell storing the OCR sample document field's value
Use the new fields `cellColumnNumber` and `cellRowNumber` on the OcrSampleDocumentField metadata type.

View the number of columns or rows that the cell storing the OCR sample document field's value must span
Use the new fields `cellColumnSpanValue` and `CellRowSpanValue` on the OcrSampleDocumentField metadata type.

View the name of the referred OCR sample document field's value
Use the new field `fieldValueName` on the OcrSampleDocumentField metadata type.

View information about fields that define an item in the OCR sample document page
Use the new field `OcrSampleDocumentPageItem` on the OcrSampleDocumentField and OcrSampleDocumentPage metadata types.

Changed Tooling API Object in Intelligent Form Reader

Use the changed Tooling API to store information extracted from a form in a target object's record type fields.

Store information extracted from a form in a target object's record type fields
Use the new `TargetObjectRecordType` field of the OcrTargetObject object.

SEE ALSO:

Industries Common Resources Developer Guide: OcrTargetObject Tooling API Object

Connect REST API

Use Intelligent Form Reader Business APIs to automatically extract data from uploaded documents and to store the data in Salesforce objects.

IN THIS SECTION:

Changed Connect REST API Response Bodies
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Get OCR Templates Response

OCR Target Object Output
This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

Get OCR Template Details Response

OCR Target Object
This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

OCR Target Object Field
This response body has this new property.

- `targetObjectRecordType`—Specifies the developer name of the record type.

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 a New Object

Use the standard object to view the result of the sentiment analysis.

SEE ALSO:

Einstein Release Notes

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: Sentiment Insights with Feedback Management is available from July 19, 2022.

SEE ALSO:

Salesforce Release Notes: Get Qualitative Feedback on Text Responses with Sentiment Insights (can be outdated or unavailable during release preview)

Sentiment Insights

Sentiment Insights Has a New Object

Use the standard object to view the result of the sentiment analysis.

View the result of sentiment analysis performed on a text field

Use the new AiSentimentResult object.

Industry Integration Solutions

Accelerate integrating Salesforce Industries applications with other external systems to realize end to end business processes by using industry-specific APIs and integration assets that are deployed on MuleSoft. The integration assets are out of the box integration templates with pre-built transformations that reduce the time and cost to go live. Use the new user interface to securely connect your Salesforce and MuleSoft orgs and automate deployment of the integration assets. After deploying the asset in your MuleSoft instance, you can extend the application in MuleSoft AnyPoint Platform to match the organizational requirements and significantly reduce the time to implement and reduce extension project costs.

The Industry APIs are available for Health Cloud and Communications Cloud. To use the APIs, you must include the Industry API Add-on (available at no additional cost) in your contract.

The Industry Integrations are available for Communications Cloud and Energy and Utilities Cloud.

IN THIS SECTION:

Accept Terms and Conditions

To access and use the Industry APIs or integrations, you must first accept the terms and conditions.

Connect Salesforce and MuleSoft

You can securely connect your Salesforce org to your existing MuleSoft instance by using the new Industry Integration Solutions user interface.

Discover Available Integration Assets

After connecting your Salesforce org and MuleSoft instance, you can view the industry- specific integration assets that are available for deployment.

Enable Integration Assets

With a click of a single button, you can deploy the available integration assets in your MuleSoft instance.

SEE ALSO:

Salesforce Help: Industry Integration Solutions (can be outdated or unavailable during release preview)

Accept Terms and Conditions
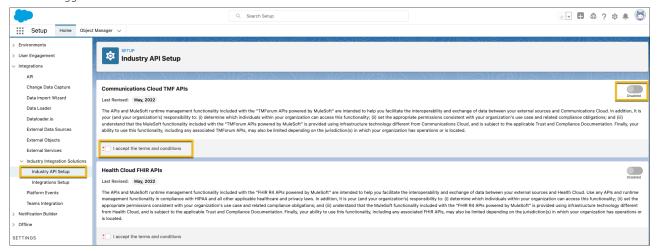
To access and use the Industry APIs or integrations, you must first accept the terms and conditions.

Where: This change applies to Lightning Experience in all editions where Industry Integration Solutions is enabled.

Who: This change is available only for the Salesforce Administrator.
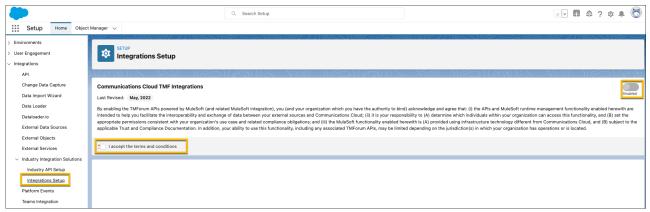
How: From Setup, expand **Integrations** and expand **Industry Integration Solutions**. To enable access to the Industry APIs, click **Industries API Setup**. Read the terms and conditions and select the **I accept the terms and conditions** checkbox and select the

Enabled toggle.

To enable access to the integration assets, click **Integrations Setup**. Read the terms and conditions and select the **I accept the terms and conditions** checkbox and select the **Enabled** toggle.

Connect Salesforce and MuleSoft

You can securely connect your Salesforce org to your existing MuleSoft instance by using the new Industry Integration Solutions user interface.

Where: This change applies to Lightning Experience in all editions where Industry Integration Solutions is enabled.

Who: This change is available only for the Salesforce Administrator.

How: From Setup, expand **Integrations** and expand **Industry Integration Solutions**. Click **Integrations Setup**. Click **Connect to MuleSoft**. Select a MuleSoft server and click **Next**. Enter your MuleSoft AnyPoint Platform login credentials and click **Sign In**. Click **Grant Access**.
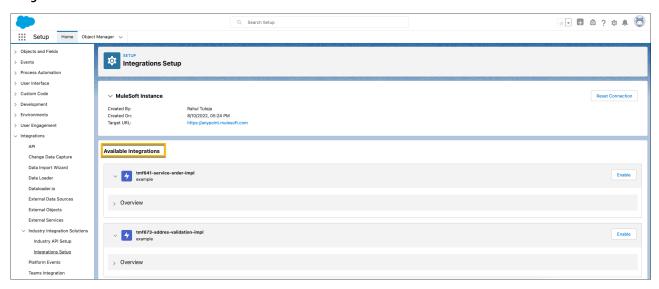
Discover Available Integration Assets

After connecting your Salesforce org and MuleSoft instance, you can view the industry- specific integration assets that are available for deployment.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

Who: This change is available only for the Salesforce Administrator.

How: After connecting to your MuleSoft instance, the integrations that are available for deployment are displayed in the **Available Integrations** section.
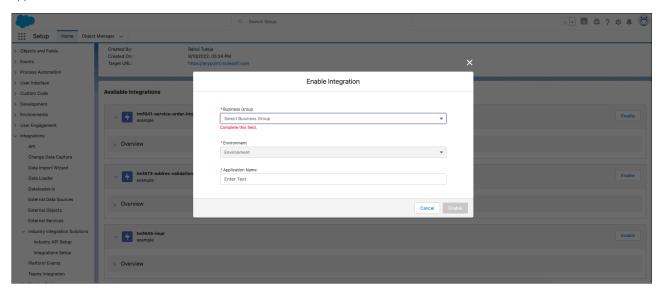
Enable Integration Assets

With a click of a single button, you can deploy the available integration assets in your MuleSoft instance.

Where: This change applies to Lightning Experience in all the editions where Industry Integration Solutions is enabled.

Who: This change is available only for the Salesforce Administrator.

How: After connecting to your MuleSoft instance, the integrations assets that are available for deployment are displayed in the **Available Integrations** area. Click **Enable** to deploy the asset in your MuleSoft instance. Select the Business Group and Environment. Enter the Application Name. Click **Enable**.

Get Started Faster with Guided Setups

Discover the new guided setups to extend your industries cloud with common features.

IN THIS SECTION:

[Get Action Plans Up and Running with Ease](#)

With Action Plans, you can capture repeatable tasks and then automate the task sequences—improving collaboration and productivity. With a new guided setup, we'll walk you through setting permissions, customizing object page layouts, and configuring Action Plan settings.

[Get Document Checklist Items Up and Running with Ease](#)

With Document Checklist Items, you can manage file uploads and approvals, which encourage your customers to provide required documentation for their business needs. With a new guided setup, we'll walk you through setting up document types, updating user profiles, creating an approval process, and updating checklist item settings.

[Get Intelligent Document Automation for Disclosures and Consent Up and Running with Ease](#)

Configure settings that control record sharing and how much information is captured when gathering consent responses. With a new guided setup, we'll walk you through configuring the settings that control record sharing and how much information is captured when gathering consent responses.

[Get Record Alerts Up and Running with Ease](#)

Alert your agents to changes in client records that require action. Using Record Alerts, agents can scan records for notifications that show information from your core banking system or from alerts that are stored in Salesforce. With a new guided setup, we'll walk you through setting up permissions, configuring record alerts, and adding the component to the record page layout.

Get Action Plans Up and Running with Ease

With Action Plans, you can capture repeatable tasks and then automate the task sequences—improving collaboration and productivity. With a new guided setup, we'll walk you through setting permissions, customizing object page layouts, and configuring Action Plan settings.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Set Up Action Plans (can be outdated or unavailable during release preview)

Get Document Checklist Items Up and Running with Ease

With Document Checklist Items, you can manage file uploads and approvals, which encourage your customers to provide required documentation for their business needs. With a new guided setup, we'll walk you through setting up document types, updating user profiles, creating an approval process, and updating checklist item settings.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Enable Document Tracking and Approvals (can be outdated or unavailable during release preview)

Get Intelligent Document Automation for Disclosures and Consent Up and Running with Ease

Configure settings that control record sharing and how much information is captured when gathering consent responses. With a new guided setup, we'll walk you through configuring the settings that control record sharing and how much information is captured when gathering consent responses.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

Salesforce Help: Intelligent Document Automation (can be outdated or unavailable during release preview)

Get Record Alerts Up and Running with Ease

Alert your agents to changes in client records that require action. Using Record Alerts, agents can scan records for notifications that show information from your core banking system or from alerts that are stored in Salesforce. With a new guided setup, we'll walk you through setting up permissions, configuring record alerts, and adding the component to the record page layout.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Navigate to Guided Setup from Setup.

SEE ALSO:

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

Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

SEE ALSO:

Release Notes: Marketing Cloud Account Engagement

Marketing Cloud Overview

Marketing Cloud: Earlier Release Notes

Salesforce Marketing Cloud Facebook Page

Marketing Cloud Account Engagement

You can now take action on prospects in third-party applications via Engagement Studio programs. Plus, you have the option to run a full sync on your prospect database and you can now grant users access to most of the Account Engagement Lightning app with new permission set licensing.

> Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

IN THIS SECTION:

Marketer Experience

Use External Actions to automate tasks and work with prospects outside of Account Engagement. Keep tabs on prospects with problematic amounts of activity and simplify consent tracking with a system of record.

Manage and Extend Account Engagement

You now have the option to trigger a full prospect sync. Plus, you get new and updated fields for Version 5 of Account Engagement API and a new option for licensing Account Engagement users.

SEE ALSO:

Marketing

Marketer Experience

Use External Actions to automate tasks and work with prospects outside of Account Engagement. Keep tabs on prospects with problematic amounts of activity and simplify consent tracking with a system of record.

IN THIS SECTION:

Automate Tasks with Extensibility Enhancements

As part of extensibility enhancements, you can now take actions on prospects outside of Account Engagement. Supercharge Engagement Studio programs by automatically registering prospects for a webinar, sending them an SMS text, creating a new lead Salesforce, and more. External actions are built on invocable actions, so you can customize them to fit your business needs. Use external actions independently or in combination with external activities to close automation gaps across platforms.

Simplify Prospect Opt-Out Status Between Account Engagement and Salesforce

The prospect Opted Out field now requires a designated system of record, giving you one place to check for a record's opt-out status. Choose between Account Engagement or Salesforce as the primary value for the prospect Opted Out field. Previously, the Opted Out field inherited the value from the most recently updated record.

Review Prospects with Bot-Like Activity

To protect the health of your business unit, Account Engagement can pause activity tracking for prospects with an excessive amount of activity. When a prospect's activity tracking is paused, an icon appears on the prospect list view and an error appears on the prospect record. A prospect's activity tracking is paused only if it impacts Account Engagement's performance. Paused prospects who are opted in can still receive marketing emails.

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 Account Engagement landing pages. To find out where affected forms are being used, refer to the Content Served Using the Default Domain report in your business unit settings.

Update WordPress Plug-In After the Security Update

The August 2022 security update that better protects your forms and marketing content affects the WordPress plug-in for Account Engagement. To get the latest updates, clear the cache in the WordPress plug-in settings.

Quickly Locate Unused Files

The new Last Viewed field on the Files list view makes it easier to free up storage space when you need it. You can see the last time that someone accessed the file online or viewed it in an email or landing page. Sort the list to find and delete unused files or to identify which files have been accessed most recently. For a consolidated view of your data, export a CSV. In the export file, use the links in the Record Location column to open the file's record and easily edit or delete them.

Automate Tasks with Extensibility Enhancements

As part of extensibility enhancements, you can now take actions on prospects outside of Account Engagement. Supercharge Engagement Studio programs by automatically registering prospects for a webinar, sending them an SMS text, creating a new lead Salesforce, and more. External actions are built on invocable actions, so you can customize them to fit your business needs. Use external actions independently or in combination with external activities to close automation gaps across platforms.

> 📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to Account Engagement Lightning App in Plus, Advanced, and Premium editions.

Why: Most marketing teams use multiple applications to work with prospects and nurture leads. These extensibility enhancements remove barriers for marketers between Account Engagement and other applications they use to get their jobs done. Use external actions to seamlessly integrate solutions and optimize your marketing.

How: For each third-party app you use to interact with prospects, set up a marketing app extension and work with your developer to create the invocable action that fits your use case. Then, add an action type to your marketing app extension.

After the action is configured, your marketing team can use it in Engagement Studio programs.

SEE ALSO:

Salesforce Help: Automate Data Sharing with Third-Party Apps (can be outdated or unavailable during release preview)

Developer Guide: Work with Extensibility Features (can be outdated or unavailable during release preview)

Simplify Prospect Opt-Out Status Between Account Engagement and Salesforce

The prospect Opted Out field now requires a designated system of record, giving you one place to check for a record's opt-out status. Choose between Account Engagement or Salesforce as the primary value for the prospect Opted Out field. Previously, the Opted Out field inherited the value from the most recently updated record.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions with a verified Salesforce connector.

How: Edit the default prospect Opted Out field, and select an option under the Sync Behavior dropdown. After you make a selection, the option to use the most recently updated record isn't available anymore.

When: You can select your sync behavior preference for the prospect Opted Out field starting on August 26, 2022. Business units created after that date are set to use Pardot by default.

Review Prospects with Bot-Like Activity

To protect the health of your business unit, Account Engagement can pause activity tracking for prospects with an excessive amount of activity. When a prospect's activity tracking is paused, an icon appears on the prospect list view and an error appears on the prospect record. A prospect's activity tracking is paused only if it impacts Account Engagement's performance. Paused prospects who are opted in can still receive marketing emails.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions.

Why: To impact Account Engagement's performance, a prospect would have to accumulate thousands of activities. This high level of activity is usually the result of a bot. However, it's possible for excessive activity to happen because Account Engagement's tracking code is placed on a page that gets a lot of traffic. For example, it's not a good idea to place the tracking code on your home page because activity is recorded every time a prospect views the page. Instead, it's much more valuable to know if a prospect is visiting a landing page or specific product page.

SEE ALSO:

Salesforce Help: Prospects with Paused Activity Tracking (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 Account Engagement landing pages. To find out where affected forms are being used, refer to the Content Served Using the Default Domain report in your business unit settings.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions.

When: The security update is mandatory after August 12, 2022, and can no longer be turned off.

Update WordPress Plug-In After the Security Update

The August 2022 security update that better protects your forms and marketing content affects the WordPress plug-in for Account Engagement. To get the latest updates, clear the cache in the WordPress plug-in settings.

📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions.

When: The security update goes into effect on August 12, 2022.

How: After August 12, navigate to the WordPress admin dashboard, open the settings for the Pardot plug-in, and click **Clear Cache**.

Quickly Locate Unused Files

The new Last Viewed field on the Files list view makes it easier to free up storage space when you need it. You can see the last time that someone accessed the file online or viewed it in an email or landing page. Sort the list to find and delete unused files or to identify which files have been accessed most recently. For a consolidated view of your data, export a CSV. In the export file, use the links in the Record Location column to open the file's record and easily edit or delete them.

Where: This change applies to all Account Engagement editions.

📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

When: The change is automatically available for all Account Engagement customers on August 25, 2022.

Manage and Extend Account Engagement

You now have the option to trigger a full prospect sync. Plus, you get new and updated fields for Version 5 of Account Engagement API and a new option for licensing Account Engagement users.

IN THIS SECTION:

Give Users Access to Account Engagement with a Dedicated Permission Set License and Permission Set
To accommodate Account Engagement users who don't require full access to Salesforce, you can now assign them the Account Engagement permission set license and Account Engagement User permission set. This permission set grants users access to most of the marketing tools available in the Account Engagement Lightning app. It doesn't include full access to campaigns in Salesforce.

Give Users Access to Account Engagement with a Dedicated Permission Set License and Permission Set

To accommodate Account Engagement users who don't require full access to Salesforce, you can now assign them the Account Engagement permission set license and Account Engagement User permission set. This permission set grants users access to most of the marketing tools available in the Account Engagement Lightning app. It doesn't include full access to campaigns in Salesforce.

📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions purchased or upgraded after February 12, 2019.

Why: This change lets you grant Identity-licensed users access to most of the features in the Account Engagement Lightning app without giving them full access to Salesforce. Previously, Identity-licensed users could access only the standalone Account Engagement app or they required full access to Salesforce to use the Account Engagement Lightning app.

SEE ALSO:

Salesforce Help: Assign Permission Sets to a Single User (can be outdated or unavailable during release preview)

Salesforce Help: Assign Permission Sets to Multiple Users (can be outdated or unavailable during release preview)

Sync All Prospect Records with One Click

Use the Sync All Prospects option to sync prospect records with Salesforce. Previously, you needed to update a prospect field to trigger a full sync. Business units with fewer than 500,000 prospects can trigger a full sync every 7 days.

📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions with fewer than 500,000 prospects and a verified Salesforce connector.

Pardot Classic App Is Being Retired

The Pardot Classic App is scheduled for retirement in all Salesforce orgs by October 17, 2022. To access Account Engagement in Salesforce and get access to the latest features, use the Account Engagement Lightning app (formerly the Pardot Lightning app). You can also continue to access the standalone legacy application at pi.pardot.com.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Where: This change applies to all Account Engagement editions.

Account Engagement API: New and Changed Items

Access more of your data with new and updated objects for version 5 of Account Engagement API.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

New Objects in Version 5

Lifecycle History

Provides information about the prospect's sales journey and current stage. Supports read and query.

Account

Represents a business unit. Supports read and query.

Other Version 5 API Changes

Prospect Email and FID Query

Added support for prospect queries based on email address and CRM FID.

Mobile

The Salesforce Mobile App updates include the upcoming retirement of two tablet experiences, forecast types now grouped by territory hierarchy, and a beta to optimize viewing mobile reports. In enhanced LWR Experience Cloud sites, custom Lightning Web Components can now have different integer property values. Mobile Publisher now has a beta to support Lightning Web Runtime (LWR) Sites for Experience Cloud, ease of configuration for navigation settings, and a kiosk mode for barcode scanner.

IN THIS SECTION:

Salesforce Mobile App

Ensure you have enabled Lightning on tablet before other tablet experiences are retired, see and use forecast types that are grouped by territory hierarchy, set different heights depending on the current screen size in enhanced LWR Experience Cloud sites, and view optimized reports on mobile devices (beta).

Mobile Publisher

Support for Lightning Web Runtime (LWR) Sites comes to Mobile Publisher for Experience Cloud (beta), configure navigation settings more easily, and barcode scanner gets kiosk mode.

Salesforce Mobile App

Ensure you have enabled Lightning on tablet before other tablet experiences are retired, see and use forecast types that are grouped by territory hierarchy, set different heights depending on the current screen size in enhanced LWR Experience Cloud sites, and view optimized reports on mobile devices (beta).

IN THIS SECTION:

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of October 17, 2022.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Sales Features			
View More Forecast Types in the Salesforce Mobile App	✔	✔	✔
Reports and Dashboards			
Get Optimized Mobile Reports with Enhanced Reports (Beta)	✔	✔	✔
Analytics			

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Unify Your Analytics on Mobile	✔	✔	✔
Access and Security			
Plan for Salesforce Mobile App Community License Access Retirement	✔	✔	✔
Setup			
Enable Lightning on Tablet Before Other Tablet Experiences are Retired	✔	✔	✔
Miscellaneous Enhancements			
Use Different Property Values for Desktop, Tablet, and Mobile in Custom Lightning Web Components	✔	✔	✔
Availability of New BarcodeScanner Features for the Salesforce App	✔	✔	✔

View More Forecast Types in the Salesforce Mobile App

See and use forecast types that are grouped by territory hierarchy. For example, you can forecast opportunity revenue by territory. Previously, in the Salesforce mobile app, you could view forecast types grouped by user role only.

Where: This change applies to the Salesforce mobile app for iOS and Android in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

   View Territory-Based Forecast Types in the Salesforce Mobile App

Get Optimized Mobile Reports with Enhanced Reports (Beta)

Enhanced Reports automatically optimizes reports for consumption on mobile devices without reconfiguring the report formats. In this improved mobile experience, you get a responsive user interface with mobile-friendly features such as faster load times, more consistent performance, and text wrapping within tables for minimized scrolling.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited Editions.

📝 Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.
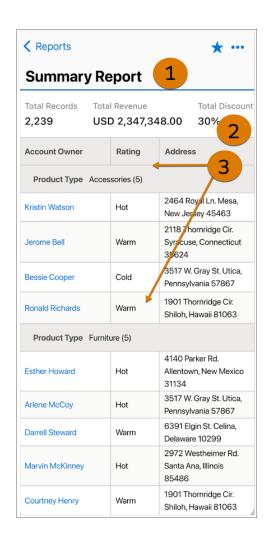
When: Enhanced Reports are available the week of October 17, 2022.

How: From Setup, in the Quick Find box, enter `Connected Apps` then select **Manage Connected Apps**. Open Salesforce for iOS or Salesforce for Android. Navigate to Custom Attributes and select **New**. For Attribute key, enter `ENABLE_ENHANCED_REPORTS`. For Attribute value, enter `"TRUE"` then select **Save**.

Open the Salesforce Mobile app. Tap the **Menu** button, then tap the **Reports** tab. Select the report that you want to view from list filter.

When you open a report, the report name appears (1) followed by a Summary Information ribbon (2) and the report header row and data (3).

SEE ALSO:

> *Salesforce Help*: View Optimized Lightning Reports with Enhanced Reports (Beta)
>
> *Salesforce Help*: Reports
>
> *Salesforce Help*: Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App
>
> *Salesforce Help*: Reports
>
> *Salesforce Help*: Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App

Unify Your Analytics on Mobile

Analytics Home that you use for the full desktop site is now on Salesforce Mobile. All of your Salesforce analytics assets are organized in a cohesive experience rather than being scattered across different tools. Plus, you get a more powerful search experience, better organization, and personalization in an intuitive and easy interface.
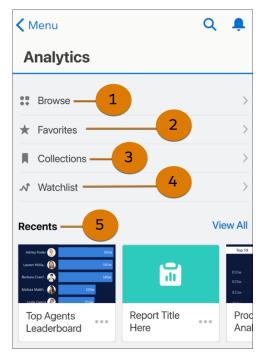
Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited Editions.

Who: A CRM Analytics license is required to access CRM Analytics Assets.
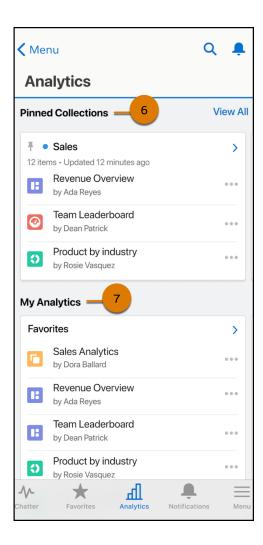
How: Unified Home is enabled from the full desktop site, which turns on Unified Analytics for mobile and desktop. From Setup, in the Quick Find box, enter `analytics`, and then select **Settings**. Select **Enable the Unified Experience for Analytics Home.**.

Open the Salesforce Mobile app. Tap the **All Items**, and select **Analytics**.

The Analytics Tab is updated to a new Unified Home experience. Browse (1) shows all your Analytics assets organized by type. Favorites (2) let you save preferred analytics assets for quick access. Collections (3) are curated CRM Analytics dashboards and lenses to customize your space. Watchlist (4) enables you to monitor your important CRM Analytics dashboard metrics from Home. Recents (5) show your most currently opened analytics assets by type.

Pinned Collections (6) are shared collections posted to your Home page. My Analytics (7) groups your recent, favorited, and shared CRM Analytics assets.

SEE ALSO:

Salesforce Help: Monitor Important Metrics with the CRM Analytics Watchlist

Salesforce Help: Curate and Share Insights with Collections

Plan for Salesforce Mobile App Community License Access Retirement

Access to the Salesforce Mobile App for those with an External Community Subscription is scheduled for retirement in all Salesforce orgs as of the Summer '23 release.

Where: This change applies to the Salesforce mobile app for iOS and Android.

SEE ALSO:

Knowledge Article: Salesforce Mobile App Community License Access Retirement

Enable Lightning on Tablet Before Other Tablet Experiences are Retired

Lightning on tablet: single-column and Legacy Salesforce1 are scheduled for full retirement in Spring '23. The new Lightning on tablet experience becomes the default tablet app experience for new organizations after Winter '22 and for all organizations in Spring '23.

Where: This change applies to the Salesforce mobile app for iOS and Android on tablet in all editions, except Database.com.

Why: A new, upgraded and unified tablet experience, Lightning on tablet, is available. We recommend that admins enable the new full-width experience for their organization prior to the retirement date. After the feature retirement period, all customers default to the new, full-width tablet experience. Customizations that weren't transitioned and tested can behave differently than desired in the new experience.

SEE ALSO:

Salesforce Help: Salesforce Mobile App Considerations for Tablets

Knowledge Article: Legacy Tablet App Experiences Retirement

Availability of New BarcodeScanner Features for the Salesforce App

Use BarcodeScanner's new features to create applications that work as a self-service kiosk. The front-facing camera support makes for a better user experience when scanning barcodes, and now you can customize the UI to fit your aesthetic and business needs.

Where: This feature is available in Salesforce App implementations of BarcodeScanner.

> Note: Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

SEE ALSO:

Salesforce Relesae Notes: Create Self-Service Kiosk Applications—A New Use Case for BarcodeScanner
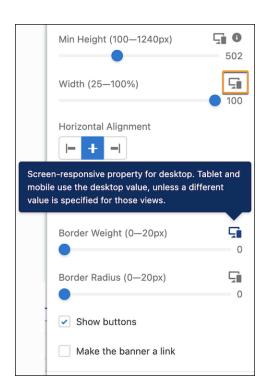
Use Different Property Values for Desktop, Tablet, and Mobile in Custom Lightning Web Components

For enhanced LWR Experience Cloud sites, custom Lightning Web Components can now have different integer property values. With screen-size responsive integer properties, custom Lightning Web Components use the integer property value that best matches the end user's screen size. For example an integer property can be used to set the height of a component. By making that property screen-size responsive, the component can now have different heights depending on the current screen size.

Where: This change applies to custom components in LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: You must programmatically declare which component properties you want to be screen-responsive.

After a property is declared screen-responsive, use Experience Builder to assign the integer property values for the different view modes. Select the custom component in the page you're configuring. In the component's property editor, properties that have been programmatically declared as screen-size responsive are indicated by an icon. Hover over the icon for additional information.

To assign the property value for each screen size, switch between the different view modes.

By default, property values set for the larger screen sizes are inherited by the smaller screen sizes.

Mobile Publisher

Support for Lightning Web Runtime (LWR) Sites comes to Mobile Publisher for Experience Cloud (beta), configure navigation settings more easily, and barcode scanner gets kiosk mode.

IN THIS SECTION:

Managed Public Distribution Option for Android Is Now Retired

The Managed Public Option for Mobile Publisher on Android devices is retired with the Winter '23 release.

Mobile Publisher for Experience Cloud Supports Lightning Web Runtime (LWR) Sites (Beta)

You can now create branded mobile apps for your LWR sites that meet high scale, security, and performance demands, by using Mobile Publisher for Experience Cloud.

Urge or Require Users to Update to the Latest Mobile Publisher App Version

For Aura sites, you can show a message to your Mobile Publisher for Experience Cloud app users that encourages or requires them to update to the version of your app that supports enhanced domains. By updating their app, users can avoid any service disruptions.

Configure Mobile Publisher Navigation Settings More Easily

To simplify how you set up Mobile Publisher for Experience Cloud in your Aura sites, the navigation settings in Experience Builder are now on one streamlined tab. Previously, the navigation settings for Mobile Publisher were spread over three separate tabs in Experience Builder.

Kiosk Mode for Barcode Scanner

Barcode scanner gets kiosk mode, which uses the front-facing camera on stationary devices to scan badges, guests tickets, or verifying vaccine codes. Use BarcodeScanner API to access kiosk mode for your Mobile Publisher apps.

Access the Mobile Device Calendar From Mobile Publisher Apps

Use CalendarService API to create a customized import feature to add and update events from the Mobile Publisher apps to the mobile device calendar. A calendar import feature lets users manage events from one location, use preferred calendar apps, and saves time from manually maintaining events or meetings in separate calendars.

Enable Marketing Cloud Push Notifications

Marketing Cloud push notifications can now be enabled in the Mobile Publisher Setup UI.

Managed Public Distribution Option for Android Is Now Retired

The Managed Public Option for Mobile Publisher on Android devices is retired with the Winter '23 release.

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

Why: In Winter '23, Salesforce has retired the 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 Retirement

Mobile Publisher for Experience Cloud Supports Lightning Web Runtime (LWR) Sites (Beta)

You can now create branded mobile apps for your LWR sites that meet high scale, security, and performance demands, by using Mobile Publisher for Experience Cloud.

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: Select your LWR site from the Experience Builder Site Information section in the Mobile Publisher Setup.

Experience Builder Site Information

* Site ℹ️

ABC - B2B Commerce - https://abdcemo-main-122ab1ab1b1-175-17ab1a1a123.foce.com/B2BLightning/s/

Urge or Require Users to Update to the Latest Mobile Publisher App Version
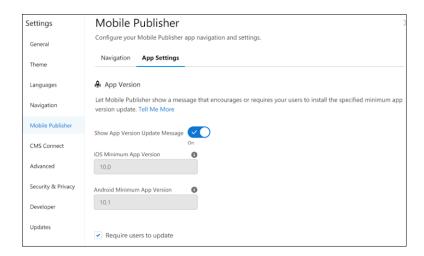
For Aura sites, you can show a message to your Mobile Publisher for Experience Cloud app users that encourages or requires them to update to the version of your app that supports enhanced domains. By updating their app, users can avoid any service disruptions.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Before you enable an app version message, make sure that you push iOS App Version 10.0 or Android App Version 10.1 to the App Store or Google Play.

The **Show App Version Update Message** and **Require users to update** options are turned on by default in Experience Builder **Settings** > **Mobile Publisher** > **App Settings**.

With both these options turned on, your app users see a message that requires them to update. If you only want to encourage users to update, turn off the **Require users to update** option, and then publish your site. App users who are running an older version of your app see the appropriate update message the next time they launch the app.

> **Note:** In Winter '24, the use of enhanced domains is being enforced for all orgs. To help you test, Salesforce deployed Enhanced Domains in sandbox and non-production orgs with Winter '23. Salesforce deploys this feature in all orgs with Spring '23 and Summer '23. You can opt out of the auto-deployment of Enhanced Domains before Spring '23. For more information, refer to the Enhanced Domains Timeline.
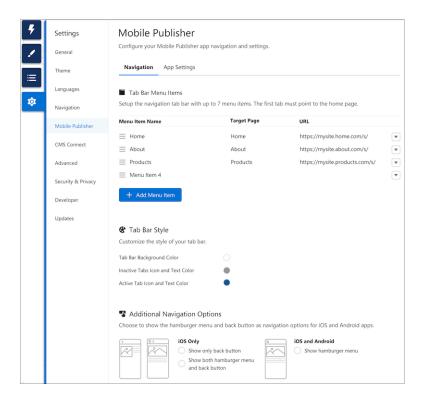
Configure Mobile Publisher Navigation Settings More Easily

To simplify how you set up Mobile Publisher for Experience Cloud in your Aura sites, the navigation settings in Experience Builder are now on one streamlined tab. Previously, the navigation settings for Mobile Publisher were spread over three separate tabs in Experience Builder.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: The navigation settings are grouped on the new Navigation tab in **Settings** > **Mobile Publisher**.

Kiosk Mode for Barcode Scanner

Barcode scanner gets kiosk mode, which uses the front-facing camera on stationary devices to scan badges, guests tickets, or verifying vaccine codes. Use BarcodeScanner API to access kiosk mode for your Mobile Publisher apps.

Where: This feature is available in all Mobile Publisher implementations of BarcodeScanner.

📝 Note: Building barcode-scanning functions using the BarcodeScanner API only works in the mobile application, not the web version on mobile or desktop.

SEE ALSO:

Lightning Web Components Developer Guide: Scan Barcodes on a Mobile Device

Salesforce Relesae Notes: Create Self-Service Kiosk Applications—A New Use Case for BarcodeScanner

Access the Mobile Device Calendar From Mobile Publisher Apps

Use CalendarService API to create a customized import feature to add and update events from the Mobile Publisher apps to the mobile device calendar. A calendar import feature lets users manage events from one location, use preferred calendar apps, and saves time from manually maintaining events or meetings in separate calendars.

Where: This feature is available for Mobile Publisher for Experience Cloud applications.

> **Note:** Building calendar-based functions using the CalendarService API only works in the mobile application, not the web version on mobile or desktop.

SEE ALSO:

Salesforce Relesae Notes: Managing a Device's Calendar Events Using Lightning Web Components

Enable Marketing Cloud Push Notifications

Marketing Cloud push notifications can now be enabled in the Mobile Publisher Setup UI.
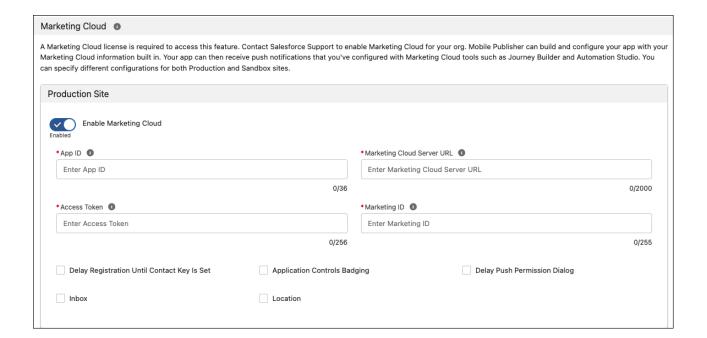
Where: This change applies to Mobile Publisher customers that have Marketing Cloud enabled.

> **Note:** A Marketing Cloud license is required to access this feature. Contact Salesforce to enable Marketing Cloud for your org.

When: The Marketing Cloud section in the Mobile Publisher Setup UI is available the week of October 31, 2022.

Why: After you've set up Marketing Cloud MobilePush for your org, you can enable Marketing Cloud push notifications for your Mobile Publisher apps. You can specify different configurations for both Production and Sandbox.

SEE ALSO:

Salesforce Help: Marketing Cloud Push Notifications

Salesforce Help: MobilePush and Automation Studio

Salesforce Help: MobilePush and Journey Builder

Revenue

Use Subscription Management to sell more subscriptions, quote prices, and manage collections. Salesforce CPQ updates improve security and performance.

IN THIS SECTION:

Subscription Management

Sell subscription products to your customers and partners through a self-service storefront in Experience Cloud. Sales and support teams using Subscription Management can now increase the quantity of a customer's subscription, and sales reps can create quotes for subscriptions. You can manage subscription products and pricing more easily, automate batch invoicing, and enable automation for recurring payments. Your collections process benefits from a new dashboard and streamlined setup.

Salesforce CPQ

A Salesforce CPQ update improves security, a release update improves browser performance, and the Salesforce CPQ External Configurator functionality is enhanced.

Subscription Management

Sell subscription products to your customers and partners through a self-service storefront in Experience Cloud. Sales and support teams using Subscription Management can now increase the quantity of a customer's subscription, and sales reps can create quotes for subscriptions. You can manage subscription products and pricing more easily, automate batch invoicing, and enable automation for recurring payments. Your collections process benefits from a new dashboard and streamlined setup.

IN THIS SECTION:

Sell Subscriptions to Customers and Partners in Experience Cloud

Capitalize on your investment in proven sales channels with minimal additional overhead. Subscription Management powers a self-service storefront for authenticated users in your Experience Cloud channel. Your customers or partners can use your storefront to buy and renew subscription products, while you use Subscription Management to manage your catalog and automate invoicing, payments, and refunds.

Set Up and Manage Products and Pricing Together

Manage your product catalog and pricing in a dedicated workspace. One card in the Subscription Management console provides quick access to the product import tool, product and pricing related list views, and a new page for selecting a default proration policy.

Sell More When Your Customers Increase the Quantity of a Subscription

With support for positive quantity amendments, you sell more because you can easily increase the quantity of a customer's subscription. Previously, no quantity amendments were supported. Quantity increases take effect on a subscription's next billing date.

Quote Subscription Products, Then Invoice and Track Them

Your sales teams can now quote deals that include subscription products. With Subscription Quotes, sales reps can apply discounts, get approvals, and send a PDF with important subscription information, such as start date, prices, and billing frequency. Reps can sync a quote with its opportunity to ensure that the latest product and pricing information on the quote is available on the opportunity. Then, when a customer accepts the quote, your team initiates the order by clicking **Create Order**, or you can configure Subscription Management to initiate the order automatically. Orders are activated when they're initiated. Subscription Management automatically creates assets and billing schedules so you can track what customers own and when the next invoice is due.

Automate Batch Invoicing

Take the hassle out of invoicing by scheduling invoice batch runs to recur at customized intervals. Quickly see when the next invoice run is scheduled to occur with the new Date and Time Zone fields on the invoice scheduler record. Use the redesigned Invoice Run Scheduler to define the logic that determines which billing schedules are included in an invoice run. See the outcome of invoice batch runs. Resolve errors with the detailed messages in the Revenue Transaction Error Log, and then click **Recover** to reset billing schedules so they can be processed again.

Enable Automation for Recurring Payments

Save your accounts receivable department time through automation. Turn on the setting Automatically Create Payment Schedules and Payment Schedule Items (Recommended). After an invoice is posted, Subscription Management creates a payment schedule and payment schedule items. Then, after you configure a payment schedule to run, payments are collected automatically.

Improve Your Collections Process with a Dashboard, Cadences, and Easier Invoice Scoring Setup

Reduce overdue invoices and improve your cash flow. Collections teams can now use a dashboard to track paid versus unpaid invoices, and managers can use cadences to guide agents through payment collection outreach. New settings offer faster setup of late payment risk scoring.

New and Changed Permissions for Subscription Management

Manage new Subscription Management functionality more easily and securely using new permissions.

Considerations for Using Subscription Management

Review new considerations for using Subscription Management.

SEE ALSO:

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

Subscription Management API

Sell Subscriptions to Customers and Partners in Experience Cloud

Capitalize on your investment in proven sales channels with minimal additional overhead. Subscription Management powers a self-service storefront for authenticated users in your Experience Cloud channel. Your customers or partners can use your storefront to buy and renew subscription products, while you use Subscription Management to manage your catalog and automate invoicing, payments, and refunds.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To use Subscription Management to administer storefronts in Experience Cloud sites, a Subscription Management license, an Experience Cloud license, and the Subscription Management User permission are required.

How: Create a flow using the Buy Now flow template for Subscription Management. After you create a flow, you can launch it from Apex. To give users (such as authenticated Experience Cloud users) access to your storefront without access to the APIs and objects referenced in the flow, configure the flow to run in System Context.

SEE ALSO:

Salesforce Help: Experience Cloud User Licenses (can be outdated or unavailable during release preview)

Salesforce Help: Automate Purchasing Processes Using a Buy Now Flow in Subscription Management (can be outdated or unavailable during release preview)

Salesforce Help: Launch a Flow from Apex (can be outdated or unavailable during release preview)

Salesforce Help: Always Run in System Context (can be outdated or unavailable during release preview)

Subscription Management API

Considerations for Using Subscription Management

Set Up and Manage Products and Pricing Together

Manage your product catalog and pricing in a dedicated workspace. One card in the Subscription Management console provides quick access to the product import tool, product and pricing related list views, and a new page for selecting a default proration policy.

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

Sell More When Your Customers Increase the Quantity of a Subscription

With support for positive quantity amendments, you sell more because you can easily increase the quantity of a customer's subscription. Previously, no quantity amendments were supported. Quantity increases take effect on a subscription's next billing date.

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

Quote Subscription Products, Then Invoice and Track Them

Your sales teams can now quote deals that include subscription products. With Subscription Quotes, sales reps can apply discounts, get approvals, and send a PDF with important subscription information, such as start date, prices, and billing frequency. Reps can sync a quote with its opportunity to ensure that the latest product and pricing information on the quote is available on the opportunity. Then, when a customer accepts the quote, your team initiates the order by clicking **Create Order**, or you can configure Subscription Management to initiate the order automatically. Orders are activated when they're initiated. Subscription Management automatically creates assets and billing schedules so you can track what customers own and when the next invoice is due.

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

Automate Batch Invoicing

Take the hassle out of invoicing by scheduling invoice batch runs to recur at customized intervals. Quickly see when the next invoice run is scheduled to occur with the new Date and Time Zone fields on the invoice scheduler record. Use the redesigned Invoice Run Scheduler to define the logic that determines which billing schedules are included in an invoice run. See the outcome of invoice batch runs. Resolve errors with the detailed messages in the Revenue Transaction Error Log, and then click **Recover** to reset billing schedules so they can be processed again.

IN THIS SECTION:

Schedule Invoice Batch Runs to Recur Daily, Weekly, or Monthly

Enjoy more flexibility by scheduling invoice runs to recur at the frequency that your business needs. Batch invoice runs can occur once or recur daily, weekly, or monthly. For example, schedule an invoice run to occur every day at 9:00 AM, every Tuesday at 9:00 AM, or every month on the fifth day. Previously, only monthly scheduling was supported.

Define the Criteria for Invoice Batch Runs

Specify the conditions and logic that Subscription Management uses to determine which billing schedules are included in an invoice run. For example, set a default criterion, such as currency, to tell Subscription Management to include only billing schedules that use the selected currency. Save time by specifying how field values are set on the invoices that are generated by the invoice run. To see which billing schedules were included in an invoice batch run, check the billing schedule related list on the invoice batch run record.

Find Out When the Next Invoice Batch Run Is Scheduled

The invoice scheduler record shows the date and time, including the time zone, for when the next invoice run is scheduled. Knowing when the next run is scheduled lets you rest assured that Subscription Management is automatically processing billing schedules and generating invoices.

See the Outcome of an Invoice Batch Run

The invoice batch run record shows summarized data about the invoice run, so you can see the outcome of the invoice run. For example, see how many billing schedules were and weren't processed. See how many invoices were generated and the total amount of those invoices.

Troubleshoot and Resolve Batch Invoicing Errors

If an error occurs when billing schedules are processed in a batch invoice run, the billing schedules can be left in a hung state. Use the Revenue Transaction Error Log to troubleshoot and resolve issues. Use the Recover button on the Invoice Batch Run detail page to reset the status of the billing schedules to Ready for Invoicing. Resetting allows the billing schedules to be included in the next scheduled invoice run.

Schedule Invoice Batch Runs to Recur Daily, Weekly, or Monthly

Enjoy more flexibility by scheduling invoice runs to recur at the frequency that your business needs. Batch invoice runs can occur once or recur daily, weekly, or monthly. For example, schedule an invoice run to occur every day at 9:00 AM, every Tuesday at 9:00 AM, or every month on the fifth day. Previously, only monthly scheduling was supported.

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

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See the Outcome of an Invoice Batch Run

The invoice batch run record shows summarized data about the invoice run, so you can see the outcome of the invoice run. For example, see how many billing schedules were and weren't processed. See how many invoices were generated and the total amount of those invoices.

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Enable Automation for Recurring Payments

Save your accounts receivable department time through automation. Turn on the setting Automatically Create Payment Schedules and Payment Schedule Items (Recommended). After an invoice is posted, Subscription Management creates a payment schedule and payment schedule items. Then, after you configure a payment schedule to run, payments are collected automatically.

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

Improve Your Collections Process with a Dashboard, Cadences, and Easier Invoice Scoring Setup

Reduce overdue invoices and improve your cash flow. Collections teams can now use a dashboard to track paid versus unpaid invoices, and managers can use cadences to guide agents through payment collection outreach. New settings offer faster setup of late payment risk scoring.

IN THIS SECTION:

Use a Dashboard to Stay on Top of Collections

Agents can use the Collections dashboard to see the invoices assigned to them, how much they've collected, and what invoices remain. You assign separate user permissions to managers and agents, so that managers see an aggregate view of their team's progress. Collections managers can use the insights from the dashboard to adjust priorities and improve your company's collections process.

Optimize Collections Outreach by Using Cadences and Related Invoices

Use cadences to focus your collections agents' efforts where they can have the biggest impact. Collections teams can relate invoices to collection targets when adding them to a cadence. In the Sales Engagement Work Queue, agents see the upcoming cadence tasks for each collection target they own. Working through the list, they can view details for each invoice and take actions like calling or emailing. Teams can see cadence activity on invoice records and use cadence reports to understand which cadences lead to the most collections.

Speed Through Setup for Einstein Late Payment Risk Scoring (Beta)

Zip through setup for late payment risk scoring. On the Collections page in Setup, new links go straight to pages for these tasks: grant users permission to use late payment risk scoring and add the Late Payment Risk field to list views and record detail pages.

Use a Dashboard to Stay on Top of Collections

Agents can use the Collections dashboard to see the invoices assigned to them, how much they've collected, and what invoices remain. You assign separate user permissions to managers and agents, so that managers see an aggregate view of their team's progress. Collections managers can use the insights from the dashboard to adjust priorities and improve your company's collections process.

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

Optimize Collections Outreach by Using Cadences and Related Invoices

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

Who: Related invoices for cadence targets are available to Sales Engagement users in orgs with a Subscription Management license. Users need the SubscriptionManagementCollections permission set group.

SEE ALSO:

Use Cadences for Collections with Related Invoices

Salesforce Help: View Engagement on Lead, Contact, Account, and Opportunity Records (can be outdated or unavailable during release preview)

Speed Through Setup for Einstein Late Payment Risk Scoring (Beta)

Zip through setup for late payment risk scoring. On the Collections page in Setup, new links go straight to pages for these tasks: grant users permission to use late payment risk scoring and add the Late Payment Risk field to list views and record detail pages.

Note: Einstein Late Payment Risk Scoring 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.

New and Changed Permissions for Subscription Management

Manage new Subscription Management functionality more easily and securely using new permissions.

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

User Permissions

These user permissions were added.

Automate Payment Scheduling
Schedule automated recurring batch payment runs to process payments in bulk according to payment schedules.

Create Assets from Orders
Create assets from orders using Subscription Management.

Create Orders from Quotes
Create and activate an order from a quote using Subscription Management.

Increase Quantity

Increase the quantity of a product using Subscription Management.

Make Collections Assignments

Assign invoices for collections agents to manage in the Collections dashboard.

Manage Assigned Collections

View and manage invoices assigned to you in the Collections dashboard.

Permission Set Groups

This permission set group was added: SubscriptionManagementSalesRep.

Permission Sets

These permission sets were added.

Subscription Management: Collections Agent

Give collections agents permission to view and manage invoices assigned to them in the Collections dashboard.This permission set isn't included in a permission set group.

Subscription Management: Collections Dashboard User

Give users visibility into collection status in a given time frame. Managers and agents see metrics for their direct and indirect reports. Added to permission set group SubscriptionManagementCollections.

Subscription Management: Collections Manager

Give managers permission to assign invoices to collections agents and view team dashboards in their role hierarchy. This permission set isn't included in a permission set group.

Subscription Management: Create Orders from Quotes

Create and activate an order from a quote using Subscription Management. Added to permission set group SubscriptionManagementSalesRep.

Subscription Management: InvoiceErrorRecovery API

If billing schedule processing doesn't finish, reset the status of billing schedules and invoice lines. Added to permission set groups SubscriptionManagementBillingAdmin and SubscriptionManagementBillingOperations.

Subscription Management: Price and Tax Calculation for Quoting

Calculate prices and taxes for quotes using Subscription Management. Added to permission set group SubscriptionManagementSalesRep.

Considerations for Using Subscription Management

Review new considerations for using Subscription Management.

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

Quotes and Orders

- When you turn on quotes in Subscription Management, standard Salesforce quotes become read-only.
- Quotes with more than 10 quote lines can't be converted to orders.
- Prices are recalculated only when the quantity of a quote line is updated.
- Sales reps can apply percentage discounts to quote lines. You can also configure volume discounts. Subscription Management doesn't support other discounts.

- If an error prevents an order from being activated when it's initiated, the order remains in draft status.

Invoicing, Billing, and Credit

- A negative line on an invoice can be converted to a credit memo only if no net settlements have been applied to the invoice.
- Only invoices with positive line amounts can be voided.

Asset Lifecycle Management

- You can increase a product's quantity between the start and end date of a subscription. Quantity decreases aren't supported.

Experience Cloud

- Subscription Management supports new sale transactions and renewals in Experience Cloud. It doesn't support quantity changes, cancellations, or new payment methods.
- Products can be sold at list price only in Experience Cloud. Discounts can't be applied.
- In Experience Cloud sites, users can't save payment methods or view payments or refunds.

Salesforce CPQ

A Salesforce CPQ update improves security, a release update improves browser performance, and the Salesforce CPQ External Configurator functionality is enhanced.

IN THIS SECTION:

Improve Security by Enabling Integration User for Calculations

In Salesforce CPQ, you can now access the external calculation service with an integration user and a short-lived access token. This method of accessing the external calculation service replaces the current method of using a user and long-lived refresh token and improves security, as Salesforce no longer stores the long-lived token.

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 Winter '23.

Create More Complex Nested Bundles

In the Salesforce CPQ external configurator, you can now configure bundles that contain up to three levels of nested child products. The nested child products can include two levels of nested bundles and one level of nested options.

Add Multiple Entries for the Same Child Product

In the Salesforce CPQ external configurator, when using the Dynamic option selection method to configure a bundle feature, sales reps can add the same child product on multiple lines. This feature lets sales reps configure each child product individually rather than only increasing the quantity of a single line item.

Improve Security by Enabling Integration User for Calculations

In Salesforce CPQ, you can now access the external calculation service with an integration user and a short-lived access token. This method of accessing the external calculation service replaces the current method of using a user and long-lived refresh token and improves security, as Salesforce no longer stores the long-lived token.

Where: This change applies to Lightning Experience and Salesforce Classic in Salesforce CPQ.

How: In Settings, find and open Installed Packages. Next to the Salesforce CPQ package, click **Configure**.

On the Pricing and Calculation tab, select **Use Integration User for Calculations**. The existing refresh token is removed and the Salesforce CPQ Integration User permission set is created. The new permission set is then added to the CPQIntegrationUserPermSetGroup permission set group.

Test the new setting by running a calculation from a quote. Then, verify that you can amend and renew a contract that is created from an opportunity. If these processes finish without errors, you're now using the new method of accessing the calculation service.

If an error occurs, update the CPQIntegrationUserPermSetGroup permission set group to grant the integration user access to custom fields or objects used during quote calculations. For example, add a permission set to the permission set group.

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 Winter '23.

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 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:

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.

Create More Complex Nested Bundles

In the Salesforce CPQ external configurator, you can now configure bundles that contain up to three levels of nested child products. The nested child products can include two levels of nested bundles and one level of nested options.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ Plus.

Add Multiple Entries for the Same Child Product

In the Salesforce CPQ external configurator, when using the Dynamic option selection method to configure a bundle feature, sales reps can add the same child product on multiple lines. This feature lets sales reps configure each child product individually rather than only increasing the quantity of a single line item.

Where: This change applies to Lightning Experience, Salesforce Classic, and the Salesforce mobile app in Salesforce CPQ Plus.

Sales

Ensure efficient sales coverage when you assign leads to territories. Empower your enablement team to accelerate business outcomes with Enablement Programs. Give Einstein Conversation Insights users a great start with a new in-app welcome experience. Integrate flows with Sales Engagement cadences. And expand sales efforts into international markets with Salesforce Maps.

IN THIS SECTION:

Core Sales Features

Tailor your forecasts to meet your business needs by adding custom calculated columns. Distribute and set access levels for leads when you assign them to territories. And add contacts to cadences from opportunities and Pipeline Inspection.

Enablement for Sales Teams

Build and launch enablement programs that drive the KPIs most important for your sales teams. Deliver programs to users directly in Salesforce. And prove enablement ROI by tying rep performance to business outcomes.

Revenue Intelligence

Create multiple versions of the Revenue Insights app. Use opportunity or opportunity splits forecast types to create analytics with Collaborative Forecasts. View analytics based on single category rollups.

Pipeline Inspection

Learn more about deal health from customer interactions, with Einstein Conversation Insights and Email Insights now available in Pipeline Inspection. Summarize pipeline metrics by standard and custom number and currency fields. And edit the opportunity amount field inline in Pipeline Inspection views.

Einstein Conversation Insights

Einstein Conversation Insights now includes a welcome experience for new users. Sales reps and managers can also see insights related to customer objections and get faster access to processed calls.

Productivity Features

Users can see all the tasks assigned to them in the new To Do List available throughout Salesforce. Einstein Activity Capture users can manage email and event associations from their Google and Outlook integrations. More users can see the Executive Involved email insight. And, for privacy, emails with a Canadian Social Insurance Number (SIN) aren't shared on the activity timeline.

Sales Engagement (formerly High Velocity Sales)

To better reflect the range of features it includes, High Velocity Sales was renamed to Sales Engagement. Sales cadences were renamed to cadences. Run flows upon cadence step completion, use screen flows as cadence steps, add automation to Sales Engagement faster with included flow templates, and use cadences for collections with related invoices.

Salesforce Maps Portfolio

Sell to and serve international markets when you build shape layers that include postal codes for the countries where you do business. Design territories using criteria that supports your sales and service goals. And distribute accounts by territory among account teams.

Sales Cloud Einstein

The lead and opportunity scoring model refresh schedule changed.

Sales Cloud for Slack (Generally Available)

Sales teams can access, update, and share records, manage their pipelines, and get important notifications about key accounts and opportunities directly from Slack. Check it out by trying the Sales Cloud for Slack app. Maintain a healthy pipeline by bringing teams together to collaborate in account- and opportunity-focused Slack channels with Salesforce data at their fingertips. Stay on top of opportunity movements by automating deal updates to the team, pushed into Slack from Salesforce. And cultivate best practices on team selling by using Slack as your platform to engage cross-functional partners and make real-time Salesforce data easily accessible to those who need it.

Reps can manage record associations in their Gmail integration. Confirm reps are using the minimum browser integration.

Reps can manage record associations in their Outlook integration.

Core Sales Features

Tailor your forecasts to meet your business needs by adding custom calculated columns. Distribute and set access levels for leads when you assign them to territories. And add contacts to cadences from opportunities and Pipeline Inspection.

IN THIS SECTION:

Tailor your forecasts to meet your business needs by adding custom calculated columns. Filter forecasts by custom fields to focus only on the data that's critical to your business. Visualize your forecasts more effectively with quota attainment progress bars and other usability enhancements. And view forecasts grouped by territory hierarchy from your mobile device.

Manage coverage for and access to leads that you now assign manually to territories.

Manage visibility of the Push Count field in list views. Add contacts to cadences from opportunities and Pipeline Inspection.

Use Dynamic Forms to create more flexible record pages for accounts, contacts, and opportunities.

Collaborative Forecasts

Tailor your forecasts to meet your business needs by adding custom calculated columns. Filter forecasts by custom fields to focus only on the data that's critical to your business. Visualize your forecasts more effectively with quota attainment progress bars and other usability enhancements. And view forecasts grouped by territory hierarchy from your mobile device.

IN THIS SECTION:

You can tailor your forecasts to meet your business needs using up to five custom calculated columns per forecast type. For example, add custom columns for commit coverage or best-case-to-commit ratios. You can show, hide, and reorder most standard and custom columns on the forecasts page.

Now your sales team can filter by custom number, currency, and picklist fields for forecasts to pinpoint the data to study. Salesforce also improved your user experience by updating custom filter setup labels for readability.

Like in the Salesforce desktop site, you can see and use forecast types in the Salesforce mobile app that are grouped by territory hierarchy. For example, you can forecast opportunity revenue by territory. Previously, in the Salesforce mobile app, you could view forecast types grouped by user role only.

When you adjust your forecasts, you can enter up to 255 characters in adjustment notes. This change provides more space to capture details such as who adjusted the forecast and why. Previously, you could enter up to 140 characters in a forecast adjustment note.

Sales reps and other forecast users can benefit from improved visualization and navigation on the forecasts page. Quota attainment percentages are shown as progress bars in the summary view. If a forecast value was adjusted and changed recently, you can see more information in a single popup, rather than two. To keep your time frame as a point of reference, the time period column is frozen as you scroll horizontally in summary view.

Create Custom Calculated Forecast Columns to Reflect Your Business

You can tailor your forecasts to meet your business needs using up to five custom calculated columns per forecast type. For example, add custom columns for commit coverage or best-case-to-commit ratios. You can show, hide, and reorder most standard and custom columns on the forecasts page.

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: Due to this enhancement, the Show gap to quota and pipeline coverage columns setting is obsolete. The setting was removed from Forecasts Settings, under Show Quotas. If you enabled the setting in the previous release, then Gap to Quota and Pipeline Coverage columns still appear on your forecasts page. However, they're custom calculated columns.
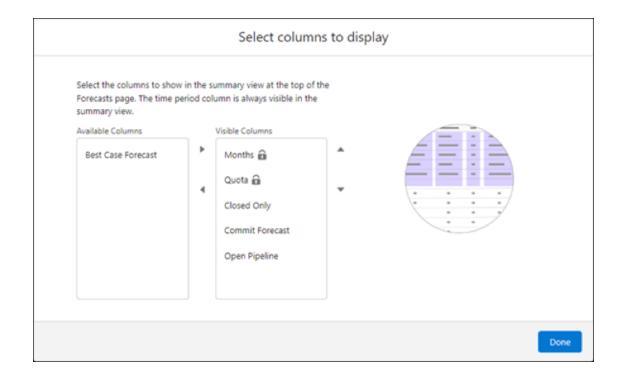
How: To add custom calculated columns, edit a forecast type. On the Forecasts Settings page, under Available Forecast Types, select **Edit Custom Columns** from the quick actions for the forecast type. Then click **Add Custom Column**.

To reference fields in your formula, use the API names for the fields. The API names are different from the column header names such as Closed and Commit. For the API field names and more custom column assistance, see Salesforce Help.

After you add custom calculated columns, decide how you want them to appear to users on the Salesforce desktop site or in the Salesforce mobile app. On the Forecasts Settings page, under Available Forecast Types, select **Select Columns to Display** from the quick actions for the forecast type.

SEE ALSO:

> *Salesforce Help*: Create Custom Calculated Columns (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Show, Hide, and Reorder Forecast Columns (can be outdated or unavailable during release preview)
>
> *Object Reference for Salesforce and Lightning Platform*: ForecastingColumnDefinition (can be outdated or unavailable during release preview)
>
> *Object Reference for Salesforce and Lightning Platform*: ForecastingColumnDefinitionLocalization (can be outdated or unavailable during release preview)
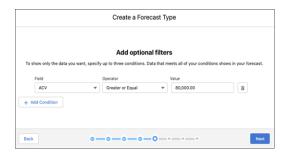
Choose Custom Opportunity Fields to Include or Exclude from Your Forecasts

Now your sales team can filter by custom number, currency, and picklist fields for forecasts to pinpoint the data to study. Salesforce also improved your user experience by updating custom filter setup labels for readability.

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, filter forecasts by a custom field representing annual contract value (ACV). Previously, you could filter only by record type, standard number, standard currency, and standard picklist fields.

How: When you create a forecast type in the setup flow, select standard and custom fields to filter by. You can add up to three conditions and use the AND operator.

Custom filters are supported in Enterprise API, Metadata API, and Tooling API.

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)
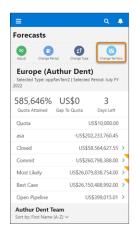
Metadata API Developer Guide: ForecastingType (can be outdated or unavailable during release preview)

View Territory-Based Forecast Types in the Salesforce Mobile App

Like in the Salesforce desktop site, you can see and use forecast types in the Salesforce mobile app that are grouped by territory hierarchy. For example, you can forecast opportunity revenue by territory. Previously, in the Salesforce mobile app, you could view forecast types grouped by user role only.

Where: This change applies to Lightning Experience and all versions of the Salesforce mobile app in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: As you view a forecast on your mobile device, tap **Change Territory** to navigate to other forecasts grouped by territory hierarchy.

SEE ALSO:
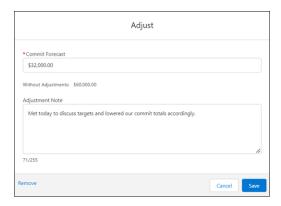
Salesforce Help: Territory Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Forecast Types in Collaborative Forecasts (can be outdated or unavailable during release preview)

Create Longer Forecast Adjustment Notes

When you adjust your forecasts, you can enter up to 255 characters in adjustment notes. This change provides more space to capture details such as who adjusted the forecast and why. Previously, you could enter up to 140 characters in a forecast adjustment note.

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.

How: In the Salesforce desktop site, hover over the forecast that you want to adjust, and then click 🖊. In the Salesforce mobile app, on the Forecasts touchscreen, tap 🖊. You can also start by tapping the forecast that you want to adjust, and then tap 🖊.

SEE ALSO:

> *Salesforce Help*: Managing Adjustments in Collaborative Forecasts (can be outdated or unavailable during release preview)
>
> New and Changed Objects

Work Smoothly with Improved Usability of Salesforce Desktop Site Forecasts
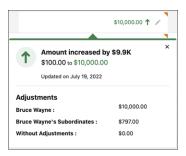
Sales reps and other forecast users can benefit from improved visualization and navigation on the forecasts page. Quota attainment percentages are shown as progress bars in the summary view. If a forecast value was adjusted and changed recently, you can see more information in a single popup, rather than two. To keep your time frame as a point of reference, the time period column is frozen as you scroll horizontally in summary view.

Where: These changes apply to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: If you enabled quotas and your user selected the **Show Quota % Attainment** display option on the forecasts page, quota attainment progress bars appear above quota attainment percentages. For information on what the colors mean, see Salesforce Help. You don't need to do any setup to freeze the first column (time period). You can't disable it.

If your user selected the **Show Changes in Last 7 Days** display option on the forecasts page, forecasts with a recent change and an adjustment show a single popup upon hover. The popup contains information about the change and the adjustment.

Enterprise Territory Management

Manage coverage for and access to leads that you now assign manually to territories.

IN THIS SECTION:

Assign Leads to Territories (Generally Available)
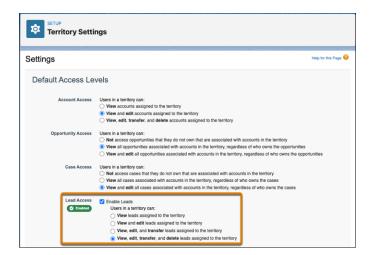
Ensure coverage for your sales teams' prospects when you distribute leads among territories manually. You determine access levels for the leads in your reps' territories.

Assign Leads to Territories (Generally Available)

Ensure coverage for your sales teams' prospects when you distribute leads among territories manually. You determine access levels for the leads in your reps' territories.
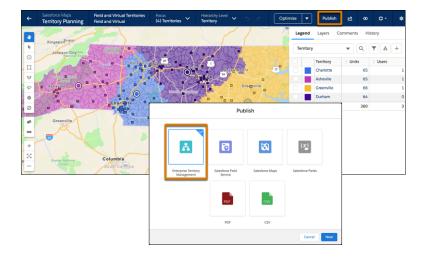
Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: Turn on Lead Access, and then specify access levels for your sales reps. Next, add the Assigned Territories related list to your lead page layouts.
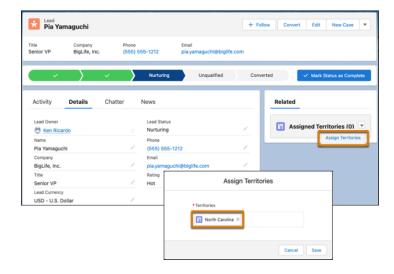
You then assign leads to territories using different methods depending on whether you assign multiple leads simultaneously or individual leads.

To assign multiple leads to territories simultaneously, you have two options. One is through Salesforce Maps Territory Planning, available as an add-on product. After you create or update your territory model with its territory assignments for leads, publish the model to Enterprise Territory Management.

Another option is to add assignments to a CSV file and then import it into Salesforce using Data Loader or another utility that's part of your data import routine.

To assign individual leads to territories, open a lead and select the territories of your choice.

Opportunities

Manage visibility of the Push Count field in list views. Add contacts to cadences from opportunities and Pipeline Inspection.

IN THIS SECTION:

Add Contacts to Cadences from Opportunities

Add opportunity contacts to cadences directly from opportunities and Pipeline Inspection. The opportunity is also automatically related to the contacts.

Control Push Count Field Visibility in Opportunity and Pipeline Inspection List Views

Now you can control whether the Push Count field appears in opportunity and Pipeline Inspection list views. Previously, if you wanted to remove users' access to it, it wasn't possible to hide or disable the field. The Push Count field indicates how many times an opportunity's close date is pushed out by a calendar month.

Add Contacts to Cadences from Opportunities

Add opportunity contacts to cadences directly from opportunities and Pipeline Inspection. The opportunity is also automatically related to the contacts.

Where: This change applies to Lightning Experience in Performance and Unlimited editions with High Velocity Sales.

Who: To add contacts to cadences, users must have a High Velocity Sales permission set.

Control Push Count Field Visibility in Opportunity and Pipeline Inspection List Views

Now you can control whether the Push Count field appears in opportunity and Pipeline Inspection list views. Previously, if you wanted to remove users' access to it, it wasn't possible to hide or disable the field. The Push Count field indicates how many times an opportunity's close date is pushed out by a calendar month.

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

How: The Push Count field is enabled by default in Pipeline Inspection and opportunities. To turn it off, go to Opportunity Settings in Setup and make your selection.

To add the Push Count field to list views, use the Select Fields to Display option in the List View Controls menu ⚙ .

Other Changes in Core Sales Features

Use Dynamic Forms to create more flexible record pages for accounts, contacts, and opportunities.

IN THIS SECTION:

Break Up Record Details in Accounts, Contacts, and Opportunities

Use Dynamic Forms to create flexible record pages for accounts (including person accounts), contacts, and opportunities. Using the Lightning App Builder, add field sections and individual fields, without having to work in the page layout editor. Then you can configure the sections and fields like the rest of the components on the page, taking advantage of visibility rules to show users only what they need.

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.

Delete Connected LinkedIn Member Accounts More Easily
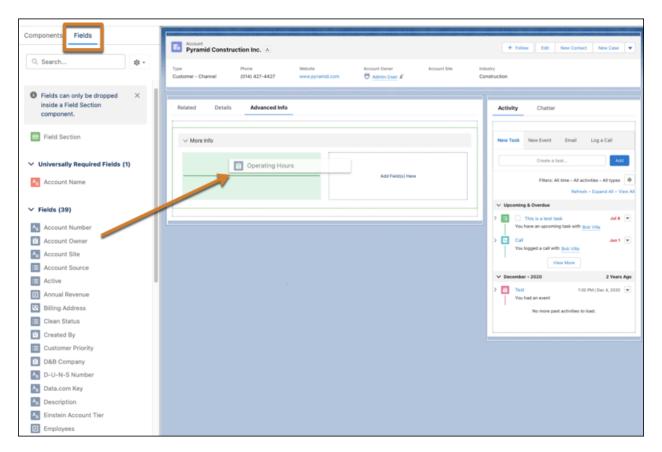
In Setup, Salesforce admins can now delete connected LinkedIn member accounts even if the account's access to any of its ad accounts has changed. Previously if the connected member account had lost access to any of its ad accounts, the deletion failed.

Break Up Record Details in Accounts, Contacts, and Opportunities

Use Dynamic Forms to create flexible record pages for accounts (including person accounts), contacts, and opportunities. Using the Lightning App Builder, add field sections and individual fields, without having to work in the page layout editor. Then you can configure the sections and fields like the rest of the components on the page, taking advantage of visibility rules to show users only what they need.

Where: This change applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
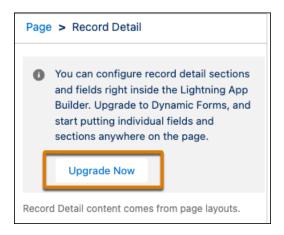
How: When you create a page using the Lightning App Builder, find the Field Section option and the available fields for each object in the Fields tab. Drag sections and fields to anywhere on the page.

To migrate a layout to Dynamic Forms, open a Lightning record page, and select **Edit Page** from the Setup menu.

The upgrade wizard takes the fields and sections from the page layout you choose and adds them to your page.

SEE ALSO:

Salesforce Help: Migrate a Record Page to Dynamic Forms (can be outdated or unavailable during release preview)

Salesforce Help: Break Up Record Details With Dynamic Forms (can be outdated or unavailable during release preview)

Salesforce Help: Lightning App Builder (can be outdated or unavailable during release preview)

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.

Delete Connected LinkedIn Member Accounts More Easily

In Setup, Salesforce admins can now delete connected LinkedIn member accounts even if the account's access to any of its ad accounts has changed. Previously if the connected member account had lost access to any of its ad accounts, the deletion failed.

Where: This feature is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to users with the Modify All Data permission.

Enablement for Sales Teams

Build and launch enablement programs that drive the KPIs most important for your sales teams. Deliver programs to users directly in Salesforce. And prove enablement ROI by tying rep performance to business outcomes.

Enable Your Sales Teams to Achieve Your Company's Revenue Goals (Generally Available)

Starting in Winter '23, Enablement is generally available. See how your enablement team can develop programs that achieve the business outcomes most important to your company. For example, build programs that that get sales reps to close deals faster, or increase their average deal amounts. Or set any sales goal of your choosing that's tracked in Salesforce. Then, prove the success of your strategy using enablement-specific analytics.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Enablement add-on license.

SEE ALSO:

Accelerate Business Outcomes with Enablement Programs (Generally Available)

Salesforce Help: Enablement

Revenue Intelligence

Create multiple versions of the Revenue Insights app. Use opportunity or opportunity splits forecast types to create analytics with Collaborative Forecasts. View analytics based on single category rollups.

Create and Share Different Revenue Insights Apps to Meet Your Teams' Needs

You can create multiple versions of the Revenue Insights app to match your sales organization structure. Team members can easily switch between versions in the Revenue Insights tab.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions for an additional cost with the Sales Cloud.

Who: To create the Revenue Insights app, you must have a Revenue Intelligence Admin permission set. To access the Revenue Insights app, users must have a Revenue Intelligence User permission set.

Why: Different sales teams sometimes want to see different forecast types. This update to Revenue Insights allows them to see analytics relevant to them.

How: When you're enabling Revenue Insights from Setup, the app detects whether you enabled Collaborative Forecasts. If not, you can choose to use role hierarchy instead. If you use Collaborative Forecasts, a list of supported forecast types appears. Select the type that meets your team's needs. After the initial instance of Revenue Insights is auto-created, you can create other versions via Analytics Studio. You can create as many versions as you need. When your team members go to view the dashboard from the Revenue Insights tab, they can select the appropriate instance of Revenue Insights depending on their forecast type.

Salesforce recommends you use a naming convention that helps your team members identify which version is appropriate for their use.

📝 Note: If you use a custom amount, historical trending must be enabled for that custom amount.

Get Revenue Insights Analytics on Opportunity Splits and Custom Amount Forecasts

Create analytics based on opportunity or opportunity splits with standard or custom amount fields when you use Collaborative Forecasts.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions for an additional cost with the Sales Cloud.

Who: To create the Revenue Insights app, you must have a Revenue Intelligence Admin permission set. To access the Revenue Insights app, users must have a Revenue Intelligence User permission set.

How: When creating Revenue Insights, if you have Collaborative Forecasts enabled, the setup allows you to specify opportunity or opportunity splits forecast types. If the forecast uses a custom amount measure that is revenue-based, this measure is used in the dashboard. The measure must be revenue-based, and quantities aren't currently supported.

📝 Note: If you use a custom amount, historical trending must be enabled for that field.

Get Revenue Insights Analytics on Single Category Rollups

Revenue Insights allows you to view analytics on single category rollups. This option allows you to see the rollup for a specific stage in the pipeline, such as Closed Won. Previously, Revenue Insights only supported analytics based on cumulative rollups.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions for an additional cost with the Sales Cloud.

Who: To create the Revenue Insights app, you must have a Revenue Intelligence Admin permission set. To access the Revenue Insights app, users must have a Revenue Intelligence User permission set.

How: If you have single category rollups enabled, your fields in Revenue Insights display the single category rollups instead of cumulative rollups.

Pipeline Inspection

Learn more about deal health from customer interactions, with Einstein Conversation Insights and Email Insights now available in Pipeline Inspection. Summarize pipeline metrics by standard and custom number and currency fields. And edit the opportunity amount field inline in Pipeline Inspection views.

IN THIS SECTION:

[Keep Deals Moving with Einstein Conversation Insights and Email Insights in Pipeline Inspection](#)

Show sales teams a select group of Einstein Conversation Insights and Email Insights in Pipeline Inspection so they can dig deeper into customer interactions to keep deals on track. Insights also include suggested actions, such as viewing calls and email records.

[Use Number and Currency Fields to Summarize Metrics in Pipeline Inspection](#)

Give sales teams more options to summarize pipeline metrics, with number and currency fields. Previously, you could summarize pipeline metrics by the Amount field only. Sales teams can now see more than just the value of their opportunities. For example, they can see summaries of monthly recurring revenue, product quantities, and annual contract value in their pipeline.

[Edit the Opportunity Amount Field Inline in Pipeline Inspection Views](#)
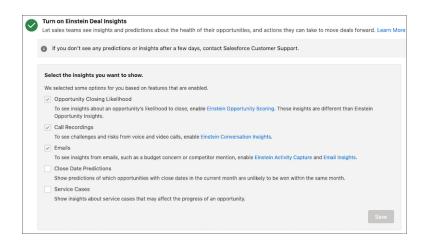
See the impact of opportunity amount changes on Pipeline Inspection metrics immediately. Now users can update the amount field inline on opportunities that don't have products.

Keep Deals Moving with Einstein Conversation Insights and Email Insights in Pipeline Inspection

Show sales teams a select group of Einstein Conversation Insights and Email Insights in Pipeline Inspection so they can dig deeper into customer interactions to keep deals on track. Insights also include suggested actions, such as viewing calls and email records.

Where: This change applies to Lightning Experience in Performance and Unlimited editions with Pipeline Inspection. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

How: To show insights from call recordings, go to Conversation Insights General Settings in Setup and configure Conversation Insights. To show insights from emails, enable and configure Einstein Activity Capture and Email Insights in Setup. After these features are enabled, insights about call recordings and emails are enabled in Pipeline Inspection.

SEE ALSO:

Salesforce Help: Turn On 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)

Use Number and Currency Fields to Summarize Metrics in Pipeline Inspection

Give sales teams more options to summarize pipeline metrics, with number and currency fields. Previously, you could summarize pipeline metrics by the Amount field only. Sales teams can now see more than just the value of their opportunities. For example, they can see summaries of monthly recurring revenue, product quantities, and annual contract value in their pipeline.

Where: This change applies to Lightning Experience in Performance and Unlimited editions with Pipeline Inspection. Pipeline Inspection is also included with Revenue Intelligence, which is available in Enterprise Edition for an additional cost.

Who: To use Pipeline Inspection, users must have a Pipeline Inspection permission set or a Revenue Intelligence permission set. To access the Flow tab, users must have a Revenue Intelligence license and the Revenue Intelligence permission set.
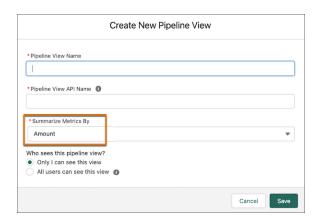
Why: Users can select the field to use for metrics' totals in their Pipeline Inspection views and the Flow Chart. When recent changes are made to values in number and currency fields, they're also highlighted in list views.

How: In Setup, go to Pipeline Inspection Setup. In the Define How Metrics Are Summarized section, select the fields that you want to make available as summary fields in Pipeline Inspection and the Flow tab, move them to Available Fields, and save. To see recent changes highlighted for your selected fields, and to show totals in the Flow tab, make sure your fields are tracked in historical trending.

The Amount field is shown to users by default. Users can change the field to a different field using the Metrics Settings option in the List View Controls menu 🔧 .

Users can also specify the summary field when creating a list view.

Edit the Opportunity Amount Field Inline in Pipeline Inspection Views

See the impact of opportunity amount changes on Pipeline Inspection metrics immediately. Now users can update the amount field inline on opportunities that don't have products.

Where: This change applies to Lightning Experience in Performance and Unlimited editions with Pipeline Inspection. Pipeline Inspection is also included with Revenue Intelligence, which is available for an extra cost in Enterprise Edition.

How: First, filter the view by a single record type. If the Amount field on an opportunity is editable, the field shows a pencil icon when you hover on it. Then edit the amount and save your work.

Einstein Conversation Insights

Einstein Conversation Insights now includes a welcome experience for new users. Sales reps and managers can also see insights related to customer objections and get faster access to processed calls.

Einstein Conversation Insights doesn't record your calls. You connect it with your recording system such as Sales Dialer, Service Cloud Voice, or other supported partners. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

IN THIS SECTION:

Give New Users a Great Start to Einstein Conversation Insights

New users have a bevy of resources available to them when starting with Einstein Conversation Insights (ECI). Our new onboarding experience includes a welcome mat, training videos, and an in-app walkthrough. Managers and reps can quickly ramp up to work effectively with ECI.

See Insights Related to Customer Objections

Sales reps and managers can now easily identify user objections made during calls with objection insights. Objections related to budget, authority, need, and timing are surfaced on video and voice records. They're also visible on the activity timeline in relevant areas.

See Items That Need Attention on the Action Items Tab

The Follow Up tab was renamed to Action Items on voice and video call records. The tab includes a new Needs Attention subsection and continues to be your one-stop shop for follow-up items. Items include suggested actions, such as sending an email or creating a task.

Get Faster Access to Processed Calls

With speedier processing time on voice and video calls, ECI users can more quickly see insights and action items related to their conversations.

Give New Users a Great Start to Einstein Conversation Insights
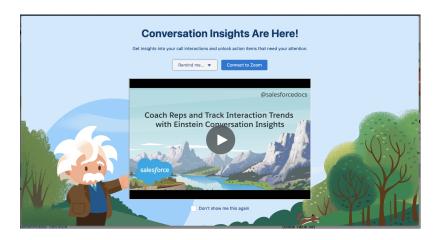
New users have a bevy of resources available to them when starting with Einstein Conversation Insights (ECI). Our new onboarding experience includes a welcome mat, training videos, and an in-app walkthrough. Managers and reps can quickly ramp up to work effectively with ECI.

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.
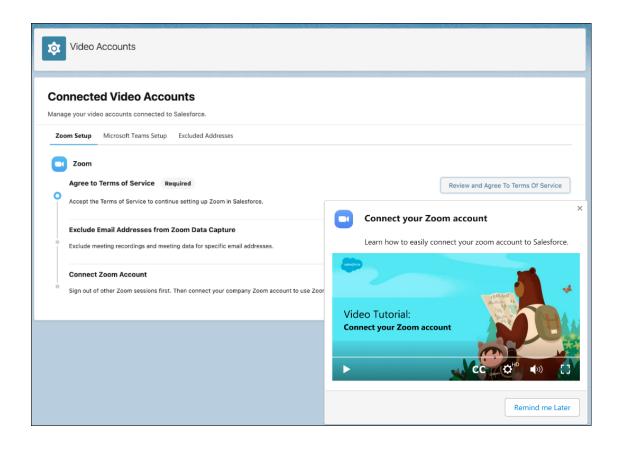
Who: This feature is available to users with access to Einstein Conversation Insights.

Why: Users are presented with a welcome mat the first time they log in to Salesforce after ECI is enabled.
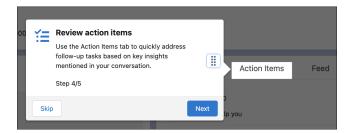
Users see a different call-to-action button depending on their available recording providers.

Prompts and banners encourage reps to begin using the product and connect available recording providers.

A docked prompt shows users how to connect their Zoom account if they haven't connected it before.

The first time a user navigates to a video or voice call record, they're treated to an in-app walkthrough that highlights the product's major features.

See Insights Related to Customer Objections

Sales reps and managers can now easily identify user objections made during calls with objection insights. Objections related to budget, authority, need, and timing are surfaced on video and voice records. They're also visible on the activity timeline in relevant areas.

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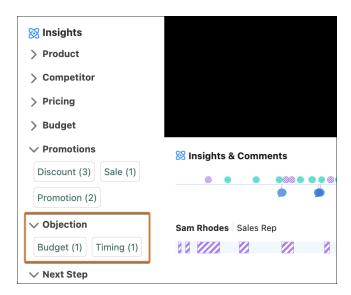
Who: This feature is available to users with access to Einstein Conversation Insights.
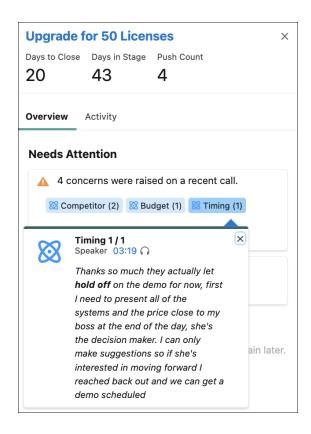
Why: Managers and reps now see insights related to different types of customer objections.

- Budget: customer issue related to price
- Authority: customer issue calling for input from someone else
- Need: customer issue related to a lack of interest or need
- Timing: customer issue indicating that the timing isn't right

The insights appear as clickable pills in video and voice records.

They're also available in the activity timeline of related records and in the Pipeline Inspection timeline if the calls are related to those opportunities.

Upgrade for 50 Licenses   ✕

Days to Close   Days in Stage   Push Count

20   43   4

Overview   Activity

Needs Attention

⚠ 4 concerns were raised on a recent call.

⊗ Competitor (2)   ⊗ Budget (1)   ⊗ Timing (1)

Timing 1 / 1   ✕
Speaker   03:19 🎧

Thanks so much they actually let
hold off *on the demo for now, first*
I need to present all of the
systems and the price close to my
boss at the end of the day, she's
the decision maker. I can only
make suggestions so if she's   ain later.
interested in moving forward I
reached back out and we can get a
demo scheduled

The existing Challenges insight has also been revamped to include challenges related to privacy, security, compliance, and trust.
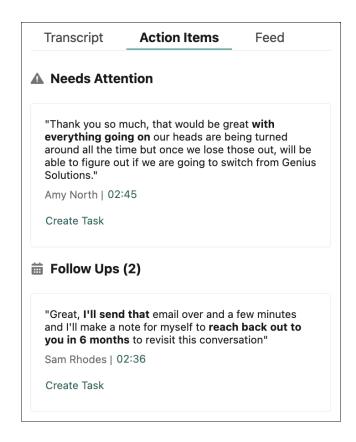
See Items That Need Attention on the Action Items Tab

The Follow Up tab was renamed to Action Items on voice and video call records. The tab includes a new Needs Attention subsection and continues to be your one-stop shop for follow-up items. Items include suggested actions, such as sending an email or creating a task.

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 is now called Action Items on call records. References to "follow-up items" are also updated to "action items."

The subsections of the tab include:

- Needs Attention: critical moments that can put a deal at risk and require attention.

  The moments highlighted here can reference different types of customer objections related to budget, authority, need, or timing. They can also refer to competitor mentions or concerns about trust, privacy, security, or other general challenges. Each item includes a suggested action.

- Follow Ups: items that require a follow-up action, such as a customer asking for additional information.

  This subsection was previously called Next Steps. The moments highlighted here reference moments that indicate some additional task is required. Each follow-up item includes a suggested action, such as sending an email, scheduling a meeting, or creating a task.

Sales reps can also receive notifications about relevant action items if calls include one.

How: Sales reps can turn conversation reminders on or off in their personal settings under Activity Reminders.

Get Faster Access to Processed Calls

With speedier processing time on voice and video calls, ECI users can more quickly see insights and action items related to their conversations.

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: Calls are now processed within minutes. Upon completion, ECI users can see relevant insights, access the transcript, and receive notifications about action items. Calls also appear in standard video and voice call list views.

This doesn't affect the availability of call data in the Conversation Insights dashboard, which is synced according to intervals determined by your Salesforce admin.

Productivity Features

Users can see all the tasks assigned to them in the new To Do List available throughout Salesforce. Einstein Activity Capture users can manage email and event associations from their Google and Outlook integrations. More users can see the Executive Involved email insight. And, for privacy, emails with a Canadian Social Insurance Number (SIN) aren't shared on the activity timeline.

IN THIS SECTION:

Track and Sort All Your Tasks with the To Do List

Now your users can see all the tasks assigned to them in one component that's available throughout Salesforce. With the To Do List docked in the Utility Bar, users can see, sort, and organize all their tasks in a single actionable view. Users can apply labels to tasks in the To Do List to customize how they organize and prioritize them. Sales Engagement users can also see tasks from cadences.

Einstein Activity Capture

Connect to Einstein Activity Capture using a Google service account. Get an overview of your users' license and connection status. Easily delete your users' emails and events from Salesforce. And more users can see Executive Involved insights on the activity timeline.

Email Experience

Users with multiple email addresses can choose which one to use when they send a list email. Developers can access the email composer from custom components, expanding the choices of developers as they create their apps. And some users must verify their email addresses to continue sending email through Salesforce.

Salesforce Inbox
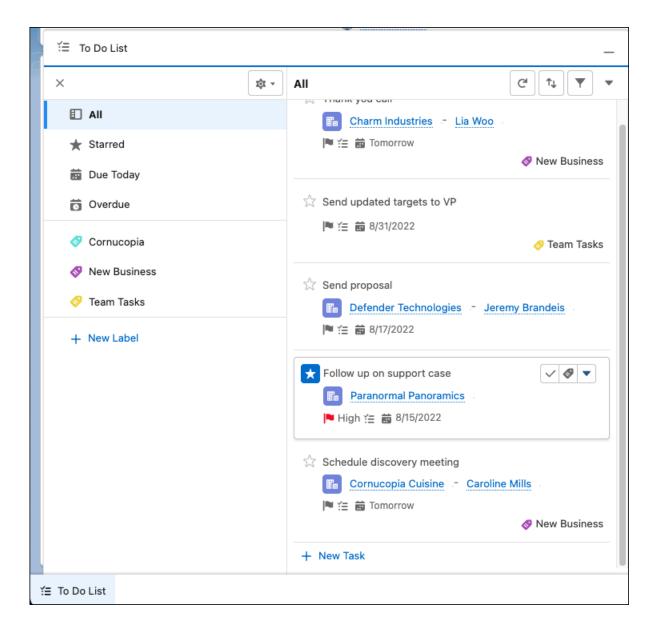
Fewer steps are required when an admin deletes all the emails or events for a given user.

Track and Sort All Your Tasks with the To Do List

Now your users can see all the tasks assigned to them in one component that's available throughout Salesforce. With the To Do List docked in the Utility Bar, users can see, sort, and organize all their tasks in a single actionable view. Users can apply labels to tasks in the To Do List to customize how they organize and prioritize them. Sales Engagement users can also see tasks from cadences.

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

How: In the App Manager, add the To Do List to the Utility Bar for users. Users can choose a task category or a label to focus on the related tasks. Select a task to see details, apply a label, or take action. To act on a cadence task, users can navigate to the cadence target record and execute the task from the Sales Engagement component.

Einstein Activity Capture

Connect to Einstein Activity Capture using a Google service account. Get an overview of your users' license and connection status. Easily delete your users' emails and events from Salesforce. And more users can see Executive Involved insights on the activity timeline.

IN THIS SECTION:

Connect Google to Salesforce with a Service Account

When setting up Einstein Activity Capture, you can now connect to Salesforce with a Google service account. With the service account authentication method, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

Track User Onboarding and License Usage

Onboard your Einstein Activity Capture users easily using new status metrics. Health Metrics shows the overall license, configuration, and connected account status for your entire user group so that you can track adoption over time.

Skip User Deactivation Before Deleting Emails or Events

If Einstein Activity Capture (EAC) or Inbox is enabled for your company, you can delete users' emails and events from storage outside of Salesforce and from the activity timeline without deactivating users first. Previously, you had to deactivate users, delete their emails and events, and then reprovision users for them to regain access to Inbox and EAC.

Expand Awareness of Executive Involved Email Insight

To provide more visibility, users who can access a record on activity timeline can see any associated Executive Involved insights. Einstein Email Insights, part of Einstein Activity Capture, gives your reps critical sales context alongside relevant emails. The Executive Involved insight identifies emails where one or more of the participants is an executive. Previously, only users who were participants on the email attached to the record could see its Executive Involved insights.

Manage Associations Easily in Gmail or Outlook

Emails and events that Einstein Activity Capture users create in their Gmail or Outlook integration are captured and automatically associated to related records. Now users can change these automatic associations from their Gmail or Outlook integration. You can remove some or all the associations between an email or event and related records, or add new associations. Previously, users could make these changes only in Salesforce.

Hide More Sensitive Emails on the Activity Timeline

The activity timeline now marks emails as sensitive when they contain a Social Insurance Number (SIN) for Canada. For example, when a sales rep sends or receives an email that contains a SIN, the email is set to Don't Share. The email is also marked as sensitive so that users know why the sharing setting was changed.

Connect Google to Salesforce with a Service Account
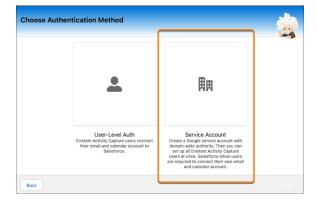
When setting up Einstein Activity Capture, you can now connect to Salesforce with a Google service account. With the service account authentication method, Einstein Activity Capture users don't connect their own account, which simplifies the rollout.

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

Why: The service account authentication method makes it easier for you to set up all your Google users at the same time. Plus, it provides the security of OAuth 2.0.

How: If you're setting up Einstein Activity Capture for the first time, select Service Account as your authentication method.

If you've set up Einstein Activity Capture and want to change your authentication method, you must reset Einstein Activity Capture. After the reset process is complete, set up Einstein Activity Capture again and select Service Account as the authentication method.

SEE ALSO:

> *Salesforce Help:* Connect to Einstein Activity Capture with a Google Service Account (can be outdated or unavailable during release preview)
>
> *Salesforce Help:* Einstein Activity Capture System Requirements (can be outdated or unavailable during release preview)
>
> *Salesforce Help:* Reset Einstein Activity Capture (can be outdated or unavailable during release preview)
>
> Streamline Your Move to Einstein Activity Capture

Track User Onboarding and License Usage

Onboard your Einstein Activity Capture users easily using new status metrics. Health Metrics shows the overall license, configuration, and connected account status for your entire user group so that you can track adoption over time.

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

Why: Use metrics to spot opportunities to fix a user's Einstein Activity Capture access and monitor usage across your enterprise. For example, find out if you missed assigning permission sets to your users.

How: From Setup, in the Quick Find box, enter `User Status`, and then select **User Status**.

SEE ALSO:

> *Salesforce Help:* Check Connection Status for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Skip User Deactivation Before Deleting Emails or Events

If Einstein Activity Capture (EAC) or Inbox is enabled for your company, you can delete users' emails and events from storage outside of Salesforce and from the activity timeline without deactivating users first. Previously, you had to deactivate users, delete their emails and events, and then reprovision users for them to regain access to Inbox and EAC.

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

How: From Setup, in the Quick Find box, enter `Data Policies`, and then select **Delete Email and Events**. Select the By User tab.

SEE ALSO:

> Delete Emails or Events Without Deactivating Users
>
> *Salesforce Help:* Delete Email and Events Logged by Einstein Activity Capture and Salesforce Inbox (can be outdated or unavailable during release preview)
>
> *Salesforce Help:* Einstein Activity Capture Basics (can be outdated or unavailable during release preview)
>
> *Salesforce Help:* Salesforce Inbox (can be outdated or unavailable during release preview)

Expand Awareness of Executive Involved Email Insight

To provide more visibility, users who can access a record on activity timeline can see any associated Executive Involved insights. Einstein Email Insights, part of Einstein Activity Capture, gives your reps critical sales context alongside relevant emails. The Executive Involved insight identifies emails where one or more of the participants is an executive. Previously, only users who were participants on the email attached to the record could see its Executive Involved insights.

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

SEE ALSO:

Salesforce Help: Turn On Einstein Email Insights (can be outdated or unavailable during release preview)

Manage Associations Easily in Gmail or Outlook

Emails and events that Einstein Activity Capture users create in their Gmail or Outlook integration are captured and automatically associated to related records. Now users can change these automatic associations from their Gmail or Outlook integration. You can remove some or all the associations between an email or event and related records, or add new associations. Previously, users could make these changes only in Salesforce.

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

Who: Users must be assigned to an Einstein Activity Capture configuration where email and event syncing is enabled. The sync direction in the configuration impacts the ability to manage record association.

SEE ALSO:

Salesforce Help: Emails and Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Help: Events and Einstein Activity Capture (can be outdated or unavailable during release preview)

Hide More Sensitive Emails on the Activity Timeline

The activity timeline now marks emails as sensitive when they contain a Social Insurance Number (SIN) for Canada. For example, when a sales rep sends or receives an email that contains a SIN, the email is set to Don't Share. The email is also marked as sensitive so that users know why the sharing setting was changed.

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

Why: To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify emails with sensitive information before they're added to the activity timeline. The activity timeline says why the email wasn't shared, and it informs users that they can choose to share the email.

We now mark emails that contain a SIN as sensitive in addition to emails that we previously marked as sensitive, such as emails that contain a Social Security number (SSN) for the United States.

SEE ALSO:

Salesforce Help: Considerations for Excluding Data from Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Help: Set Default Activity Sharing for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Email Experience

Users with multiple email addresses can choose which one to use when they send a list email. Developers can access the email composer from custom components, expanding the choices of developers as they create their apps. And some users must verify their email addresses to continue sending email through Salesforce.

IN THIS SECTION:

Get More Options for From Addresses in List Emails

Make a list email appear like it's coming from a group, such as sales@company.com, or a tailored user, such as jsmith@company.com. Recipients react differently to emails depending on the sender's name and email address. For example, something from a support department is more likely to be opened than something from an unknown person.

Access the Email Composer from Custom Components

Developers can now invoke the send email action from a custom component in Lightning Experience. The fields can be left blank, or use predefined values. Previously, you could access the email composer only from the UI, either through the Global Action menu, or via the Send Email tab on a record's detail page. Standard quick actions can be invoked using the navigation service and page reference from any custom component.

Verify Your Email Address to Send Email Through Salesforce

Stay current and prevent downtime by verifying your email address. If you send an email through Salesforce 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.

Review Hourly Send Limits for Single Emails

Reps sending emails through the email composer can send up to 250 emails per hour. The org daily limit for single emails remains the same.

Get More Options for From Addresses in List Emails
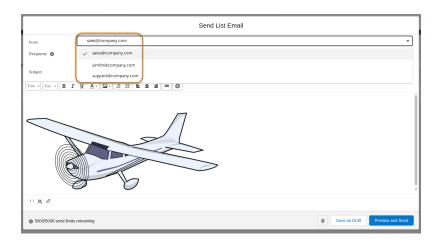
Make a list email appear like it's coming from a group, such as sales@company.com, or a tailored user, such as jsmith@company.com. Recipients react differently to emails depending on the sender's name and email address. For example, something from a support department is more likely to be opened than something from an unknown person.

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

Who: To use this feature, a rep must be able to use org-wide email addresses or have multiple connected accounts via Inbox or Einstein Activity Capture.

Why: When a rep chooses from multiple email addresses, replies automatically go to the email address of the sender. Replies to an email from sales@company.com go to that org-wide email's work queue, while replies to the created email jsmith@company.com support a market attribution calculation.

How: If your company isn't participating in the External List Email pilot, announced in Summer '21, create at least one org-wide email address.

If your company is participating in the External List Email pilot and is using Einstein Activity Capture, create a Gmail or Outlook connected account.

If your company isn't using Einstein Activity Capture, create at least one org-wide email address. Your users also need OAuth with their Gmail or Outlook accounts.

SEE ALSO:

Salesforce Help: Set Up Send Email from Salesforce with Gmail™ or Office 365™ (can be outdated or unavailable during release preview)

Salesforce Help: Send List Email in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Help: Organization-Wide Email Addresses (can be outdated or unavailable during release preview)

Salesforce Help: Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox (can be outdated or unavailable during release preview)

Access the Email Composer from Custom Components

Developers can now invoke the send email action from a custom component in Lightning Experience. The fields can be left blank, or use predefined values. Previously, you could access the email composer only from the UI, either through the Global Action menu, or via the Send Email tab on a record's detail page. Standard quick actions can be invoked using the navigation service and page reference from any custom component.

Where: This change applies to custom Lightning and Aura web components in Lightning Experience in all editions.

How: Create a page reference for a quick action. Use the navigation service to launch the page reference from a custom component.

SEE ALSO:

Lightning Aura Components Developer Guide: Create an Email as a Quick Action in Aura (can be outdated or unavailable during release preview)

Lightning Web Components Developer Guide: Create an Email as a Quick Action in LWC (can be outdated or unavailable during release preview)

Verify Your Email Address to Send Email Through Salesforce

Stay current and prevent downtime by verifying your email address. If you send an email through Salesforce 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.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions. This change doesn't apply to paying customers that use SSO.

When: We plan to prevent sends from any non-SSO email address without updated verification tracking with Spring '23.

SEE ALSO:

> *Knowledge Article:* Spring '22 authentication email with the subject 'Salesforce email verification'

Review Hourly Send Limits for Single Emails

Reps sending emails through the email composer can send up to 250 emails per hour. The org daily limit for single emails remains the same.

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

When: This change applies to new orgs created in Summer '23 and Winter '23 after September 22, 2022.

SEE ALSO:

> *Salesforce Help:* Email Allocations per Edition (can be outdated or unavailable during release preview)

Salesforce Inbox

Fewer steps are required when an admin deletes all the emails or events for a given user.

IN THIS SECTION:

Salesforce Inbox Mobile
Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

Delete Emails or Events Without Deactivating Users
If you're using Einstein Activity Capture and Inbox, save time and delete users' emails and events without deactivating those users first.

Let Your Customers Pick Their Own Meeting Times in Gmail and Outlook Integrations
Scheduling meetings has gotten even easier. When reps send an email to a customer, they can include a link to their Outlook or Gmail calendar so that the customer can choose their own meeting time. Previously, reps could only insert available times for their customers to choose from.

Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- Salesforce Inbox for iOS Release Notes
- Salesforce Inbox for Android Release Notes

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

Delete Emails or Events Without Deactivating Users

If you're using Einstein Activity Capture and Inbox, save time and delete users' emails and events without deactivating those users first.

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

SEE ALSO:

Skip User Deactivation Before Deleting Emails or Events

Let Your Customers Pick Their Own Meeting Times in Gmail and Outlook Integrations
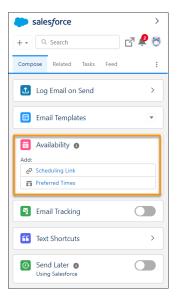
Scheduling meetings has gotten even easier. When reps send an email to a customer, they can include a link to their Outlook or Gmail calendar so that the customer can choose their own meeting time. Previously, reps could only insert available times for their customers to choose from.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Salesforce Inbox, Enhanced Email, and Outlook or Gmail integration enabled.
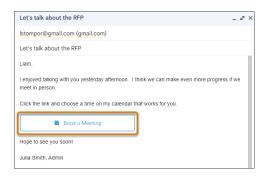
When: This feature is available starting in December 2022.

Who: Users with the Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license can use this feature.
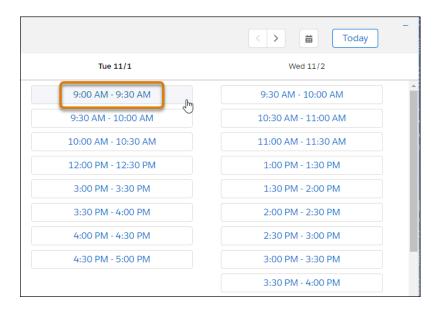
How: Start composing an email. Click **Scheduling Link** to insert a link in an email.

The recipient clicks **Book a Meeting** and the rep's calendar appears.

The recipient chooses the best meeting time for their schedule.

The event is confirmed, and the meeting is on the books.

SEE ALSO:

> *Salesforce Help:* Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox (can be outdated or unavailable during release preview) (can be outdated or unavailable during release preview)

Sales Engagement (formerly High Velocity Sales)

To better reflect the range of features it includes, High Velocity Sales was renamed to Sales Engagement. Sales cadences were renamed to cadences. Run flows upon cadence step completion, use screen flows as cadence steps, add automation to Sales Engagement faster with included flow templates, and use cadences for collections with related invoices.

High Velocity Sales and its features are 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:

High Velocity Sales Was Renamed to Sales Engagement

The automation features within the app have grown to include customer engagement tracking, chatbots, and 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 for the new name throughout the app.

Sales Cadences Were Renamed to Cadences

Teams can now use sales cadences for more than sales. Sales Engagement (formerly High Velocity Sales) users can create cadences for invoice collection and opportunity nurturing and for inside sales. To better capture their range of capabilities, the name is now simply cadences.

Perform Actions with Flow When Reps Complete a Cadence Step

Now sales managers can use flows to perform key actions, such as updating the lead path or opportunity stage, when reps complete a specific step in a cadence. Sales managers can add flows to cadence steps in the Cadence Builder. Use the new Cadence Autolaunched Flow process type to create flows triggered after cadence steps, or use the included flow templates to get started.

Use Screen Flows as Cadence Steps

Now sales managers can specify a screen flow as a cadence step in the Cadence Builder. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Use the new Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

Add Automation to Sales Engagement Easily with Included Flow Templates

Now you can add automation to Sales Engagement faster with Flow templates designed specifically to perform common tasks. When lead records update, you can automatically remove a lead from a cadence. Previously, admins needed to build these automations themselves in Flow Builder.

Use Cadences for Collections with Related Invoices

Associate invoices with collection targets when adding them to a cadence. Collections managers and agents can see cadence activity on invoice records and use cadence reports to understand which cadences lead to the most collections. Managers and reps can choose to attribute the invoice revenue to a cadence right away or only after the invoice is collected.

Add Contacts to Cadences from Opportunities and Pipeline Inspection

Add opportunity contacts to cadences directly from opportunities and Pipeline Inspection. The opportunity is also related to the contacts automatically.

Add Targets to Cadences More Flexibly by Starting Them at a Specific Step

If you use automation that adds targets to cadences automatically, you can now add more intelligence to your flows. Use the new Cadence Step Name or Id parameter on the Assign Target to Cadence action to start cadence targets at any step in a cadence. Start targets on a specific step based on a field value or another condition.

Users Can Log Call Results More Easily with the Updated Log a Call Window

For all Sales Engagement users, the Call Results setting is now enabled in Dialer Setup and the Call Results section appears in the Log A Call window. Previously only Dialer users could see the Call Results section of the window. A new call result value, Unqualified, was added.

High Velocity Sales Was Renamed to Sales Engagement

The automation features within the app have grown to include customer engagement tracking, chatbots, and 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 for the new name throughout the app.

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

## Sales Cadences Were Renamed to Cadences

Teams can now use sales cadences for more than sales. Sales Engagement (formerly High Velocity Sales) users can create cadences for invoice collection and opportunity nurturing and for inside sales. To better capture their range of capabilities, the name is now simply cadences.

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

Perform Actions with Flow When Reps Complete a Cadence Step

Now sales managers can use flows to perform key actions, such as updating the lead path or opportunity stage, when reps complete a specific step in a cadence. Sales managers can add flows to cadence steps in the Cadence Builder. Use the new Cadence Autolaunched Flow process type to create flows triggered after cadence steps, or use the included flow templates to get started.

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

How: In the Cadence Builder, sales managers can add a flow to a cadence step. The step must be an action step, such as an email, call, LinkedIn, or screen flow step.

You can build flows based on the Cadence Autolaunched Flow process type, or use the included flow templates based on that process type. The flow runs when a rep completes a step for a cadence target.

Three cadence autolaunched flow templates are included in Winter '23. Flow templates must be activated before being cloned.

- Update Contact Owner: Update the contact and account owner to the current cadence target assignee.
- Update Lead Path: Update the lead status to Contacted.
- Update Opportunity Stage: If the related opportunity stage name is Prospecting, update it to Qualification.

SEE ALSO:

Salesforce Help: Run Flows After Cadence Steps with Cadence Autolaunched Flow Templates (can be outdated or unavailable during release preview)

Use Screen Flows as Cadence Steps

Now sales managers can specify a screen flow as a cadence step in the Cadence Builder. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Use the new Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

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

How: In the Flow Builder, create a screen flow from the Cadence Step Flow process type. Three flow templates are included in Winter '23. Flow templates must be activated before being cloned.

- Create a Case
- Create an Event
- Create a Task

Then add the screen flow as a step in the Cadence Builder.

SEE ALSO:

Salesforce Help: Add Screen Flows to Cadences with Cadence Step Flow Templates (can be outdated or unavailable during release preview)

Add Automation to Sales Engagement Easily with Included Flow Templates

Now you can add automation to Sales Engagement faster with Flow templates designed specifically to perform common tasks. When lead records update, you can automatically remove a lead from a cadence. Previously, admins needed to build these automations themselves in Flow Builder.

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

Who: Users with the Manage Flow permission can create flows from the included templates.

How: In Flow Builder, choose the Autolaunched Flow category. Clone the template you want to use, and then customize it to fit your business. Flow templates must be activated before being cloned. These flow templates are included.

- Remove Lead from Cadence on Opt-Out: If the Email Opt Out field is set to true, remove the lead from a cadence.
- Remove Unqualified Lead: If the lead Status field is set to Unqualified, remove the lead from a cadence. Set the Completion Disposition to Disqualified.

SEE ALSO:

Salesforce Help: Add Automation to Sales Engagement with Standard Autolaunched Flow Templates (can be outdated or unavailable during release preview)

Use Cadences for Collections with Related Invoices
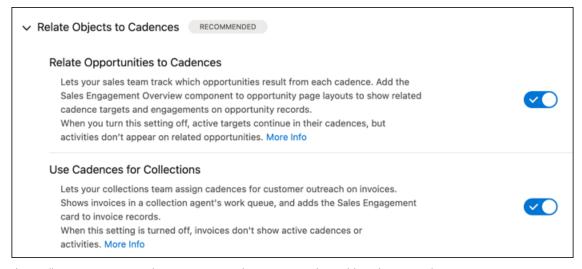
Associate invoices with collection targets when adding them to a cadence. Collections managers and agents can see cadence activity on invoice records and use cadence reports to understand which cadences lead to the most collections. Managers and reps can choose to attribute the invoice revenue to a cadence right away or only after the invoice is collected.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.
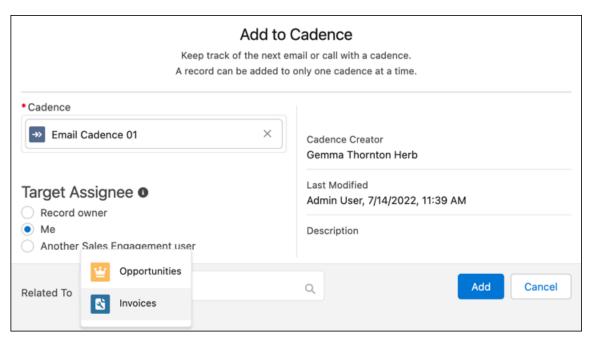
Who: Related invoices for cadence targets are available to Sales Engagement users in orgs with a Subscription Management license. Users need the SubscriptionManagementCollections permission set group.

Why: When collection managers use cadences, reps get reminders of collection tasks in the Work Queue. Cadences make revenue collection more consistent, understandable, and easier to adjust for your entire team.
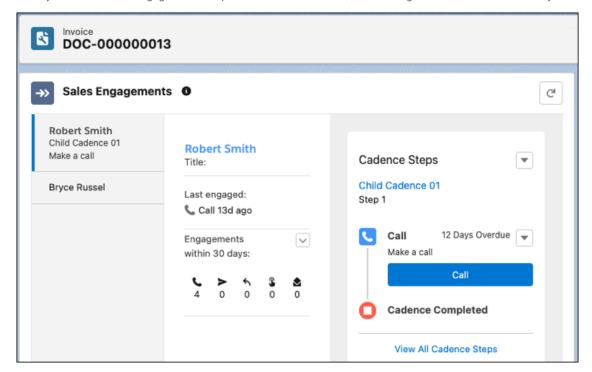
How: In Setup, turn on Use Cadences for Collections in Sales Engagement settings.

Then collection agents can relate invoices to cadence targets when adding them to cadences.

When you add the Sales Engagement component to invoice records, collection agents can see cadence activity.

Add Contacts to Cadences from Opportunities and Pipeline Inspection

Add opportunity contacts to cadences directly from opportunities and Pipeline Inspection. The opportunity is also related to the contacts automatically.

Where: This change applies to Lightning Experience in Performance and Unlimited editions with High Velocity Sales.

Who: To add contacts to cadences, users must have a High Velocity Sales permission set.

How: From the object management settings for opportunities, go to Page Layouts. Find the Add to Cadence action in Mobile & Lightning Actions and drag it to the Salesforce Mobile and Lightning Actions section.

To add contacts from an opportunity, click **Add to Cadence**. You can include the related opportunity, or change or remove it manually. In Pipeline Inspection, specific deal insights on opportunities also include an action to add contacts to cadences.

Add Targets to Cadences More Flexibly by Starting Them at a Specific Step

If you use automation that adds targets to cadences automatically, you can now add more intelligence to your flows. Use the new Cadence Step Name or Id parameter on the Assign Target to Cadence action to start cadence targets at any step in a cadence. Start targets on a specific step based on a field value or another condition.

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

Who: The Assign Target to Cadence action is available to users with the Manage Flow permission.

How: Include the cadence step name when you configure the Assign Target to Sales Cadence invocable action for a flow. The step must be an action step, such as an email, call, LinkedIn, or screen flow step.

Users Can Log Call Results More Easily with the Updated Log a Call Window

For all Sales Engagement users, the Call Results setting is now enabled in Dialer Setup and the Call Results section appears in the Log A Call window. Previously only Dialer users could see the Call Results section of the window. A new call result value, Unqualified, was added.

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

Salesforce Maps Portfolio

Sell to and serve international markets when you build shape layers that include postal codes for the countries where you do business. Design territories using criteria that supports your sales and service goals. And distribute accounts by territory among account teams.

IN THIS SECTION:

Salesforce Maps
Plan international territories using shape layers and call contacts from linked phone numbers without having to switch to Salesforce.

Salesforce Maps Territory Planning
Design and create territories based on assignment rules that you publish to Enterprise Territory Management. Update account teams from Territory Planning. And assign units to any area regardless of their level in your hierarchy.

Salesforce Maps Mobile
Call accounts, leads, and contacts directly from the map using the Salesforce mobile app.

Salesforce Maps

Plan international territories using shape layers and call contacts from linked phone numbers without having to switch to Salesforce.

IN THIS SECTION:

Create Shape Layers Using International Postal Codes
Expand into and support your international territories when you add postal codes for any combination of countries supported in Salesforce Maps.
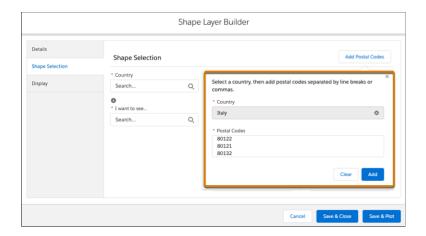
Generate leads and support customers efficiently when you call them directly from Salesforce Maps, which works with Salesforce Open CTI and your telephony system to make outbound calls. Linked phone numbers on a marker or waypoint pop-up, for example, let you start calls and stay in your workflow.

Create Shape Layers Using International Postal Codes

Expand into and support your international territories when you add postal codes for any combination of countries supported in Salesforce Maps.

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

How: To create shape layers that include specific postal codes, select a country, and then enter or paste the postal codes that you want to include. Add postal codes for each supported country that matters to you.

SEE ALSO:
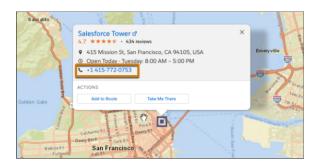
Salesforce Help: Supported Postal Code Formats for Shape Layers

Call Customers from the Map

Generate leads and support customers efficiently when you call them directly from Salesforce Maps, which works with Salesforce Open CTI and your telephony system to make outbound calls. Linked phone numbers on a marker or waypoint pop-up, for example, let you start calls and stay in your workflow.

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

How: To make calls from Salesforce Maps, locate and click the number that you want to dial.

Salesforce Maps Territory Planning

Design and create territories based on assignment rules that you publish to Enterprise Territory Management. Update account teams from Territory Planning. And assign units to any area regardless of their level in your hierarchy.

IN THIS SECTION:

Assign Units Using Criteria That You Define

Distribute accounts to reps based on their areas of responsibility, such as industry, annual revenue, and number of employees. Create rules for assigning companies that match your defined criteria to specific reps in Salesforce Maps Territory Planning. Visualize the effects of adding and changing rules on the map before you publish them to Enterprise Territory Management.

Assign Account Teams to Territories (Generally Available)

Balance territories and the work that you distribute to your account teams in Salesforce Maps Territory Planning. Ensure that team members get access to only the accounts that they're responsible for when you assign members and select their roles within each territory area. Then publish team assignments to accounts or to a CSV file for importing into other systems.

Visualize and Preview Assignment Changes

View the impact of proposed assignment changes and territory optimization immediately inside of Salesforce Maps Territory Planning. Watch territory metrics update in real time as you select territories, adjust unit assignments and assignment rules, and optimize—all before saving your changes. Save time by previewing changes in Territory Planning even when you're working with Enterprise Territory Management models.

Measure Transfers of Unit Ownership when Planning Territories

Identify accounts that transfer to new areas as a result of adjusting and optimizing territories in Salesforce Maps Territory Planning. Now you can show the impact of these accounts on the new areas in terms of numeric attributes such as annual revenue and employees.

Manage Placeholders During Optimization for Any Use Case

Take advantage of new placeholder options available during alignment optimization in Salesforce Maps Territory Planning. Add another level to your territory balancing efforts when you allocate units to, from, or excluding placeholder areas.

Map New and Updated Boundaries

Discover the latest boundaries available that provide more options for creating territories in Salesforce Maps Territory Planning. When you create datasets and plan territories, select specific areas using new and updated geographic territory boundaries such as postal codes.

Other Enhancements in Salesforce Maps Territory Planning
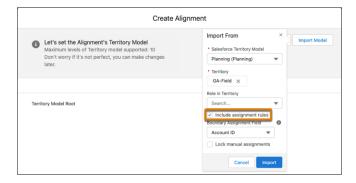
Create exact unit assignments and update Salesforce fields without worrying about publishing failures. Take advantage of bulk imports for high data volumes, and specify which users can publish to active territory models.

Assign Units Using Criteria That You Define
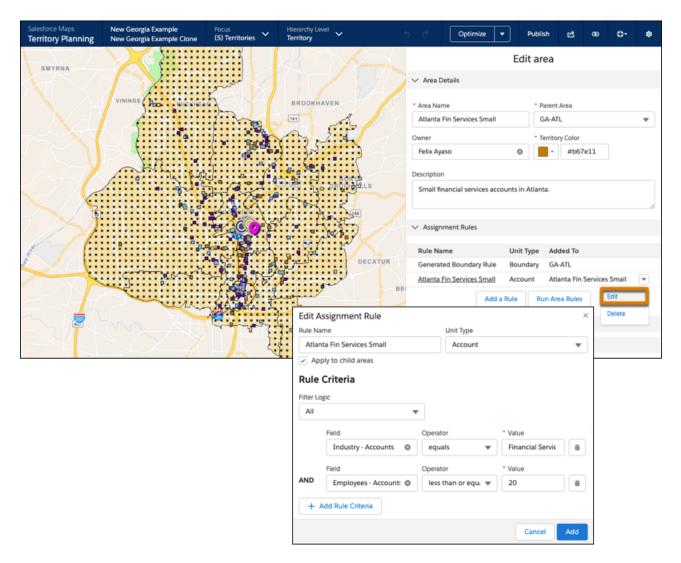
Distribute accounts to reps based on their areas of responsibility, such as industry, annual revenue, and number of employees. Create rules for assigning companies that match your defined criteria to specific reps in Salesforce Maps Territory Planning. Visualize the effects of adding and changing rules on the map before you publish them to Enterprise Territory Management.

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

How: When you create alignments based on a Salesforce territory model that you import, include that model's assignment rules.

Create and fine-tune assignment rules in each area.
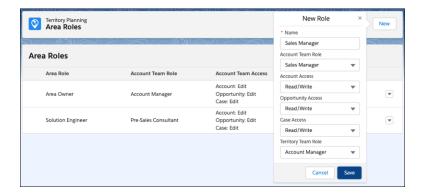
After you create and fine-tune your assignment rules, run them for that area. Publishing the alignment or focus to Enterprise Territory Management updates the assignment rules for that territory model.

Assign Account Teams to Territories (Generally Available)
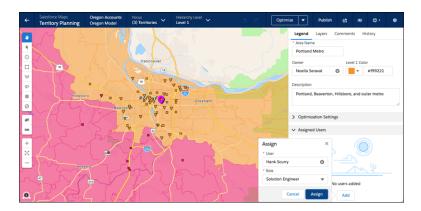
Balance territories and the work that you distribute to your account teams in Salesforce Maps Territory Planning. Ensure that team members get access to only the accounts that they're responsible for when you assign members and select their roles within each territory area. Then publish team assignments to accounts or to a CSV file for importing into other systems.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.
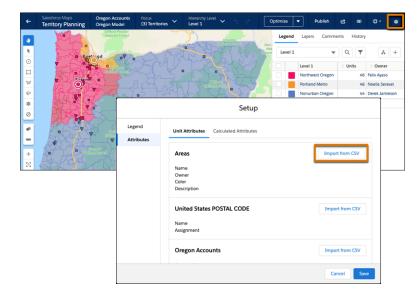
How: Specify the account team roles that you want available when assigning users and their roles to areas in Territory Planning. Create any other roles that fit with your territory planning efforts.
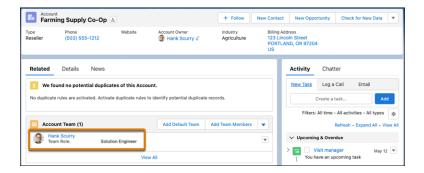
Add users and the roles that they serve to each area in Territory Planning.

To add users and the roles that they serve to multiple areas simultaneously, create a CSV file that includes those users and their roles. Then import the CSV file into the alignment.

Publish assignments from Territory Planning to accounts in Salesforce using options that best meet your objectives. When you publish assignments to accounts, you choose whether to add to or overwrite established roles or to replace specific role assignments. Team assignments appear on accounts within the alignment or focus that you published.
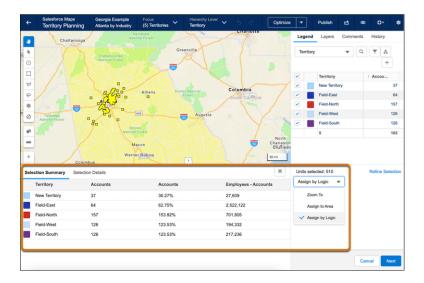
Visualize and Preview Assignment Changes

View the impact of proposed assignment changes and territory optimization immediately inside of Salesforce Maps Territory Planning. Watch territory metrics update in real time as you select territories, adjust unit assignments and assignment rules, and optimize—all before saving your changes. Save time by previewing changes in Territory Planning even when you're working with Enterprise Territory Management models.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.
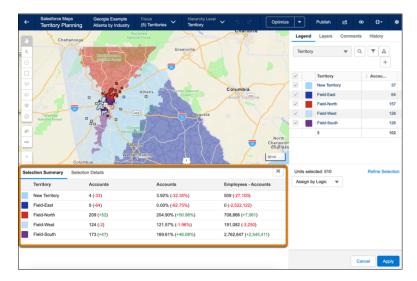
How: Select territories that you want to update or optimize. As you select the territories, they appear in the Selection Summary table. Let's say you want to change the territories' unit assignments based on logic and see how those changes look before committing to them.

You want to assign the units to the nearest center's area and preview the changes.

Based on the updated metrics shown in the Selection Summary, you then decide if you want to apply those changes.
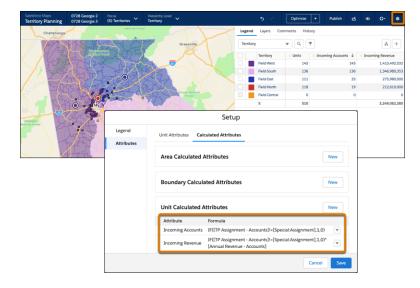
Measure Transfers of Unit Ownership when Planning Territories
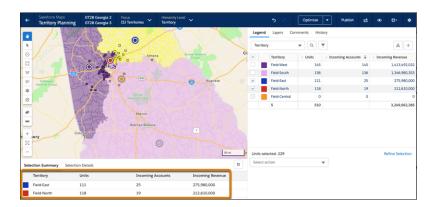
Identify accounts that transfer to new areas as a result of adjusting and optimizing territories in Salesforce Maps Territory Planning. Now you can show the impact of these accounts on the new areas in terms of numeric attributes such as annual revenue and employees.

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

How: From an alignment, create a calculated attribute for incoming units to territories. Create any other calculated attributes that help with your planning efforts, such as revenue, that those incoming units represent. Add columns for the calculated attributes to the legend.

When you adjust and optimize territories, the calculated attributes show the incoming units and the revenue for those units. Calculated attributes that reference special attribute fields can't be included in optimization.
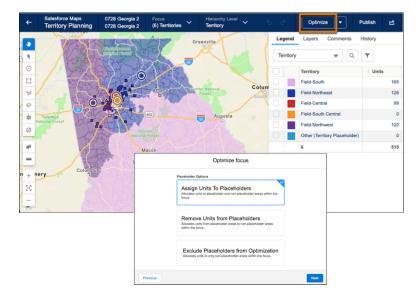
Manage Placeholders During Optimization for Any Use Case
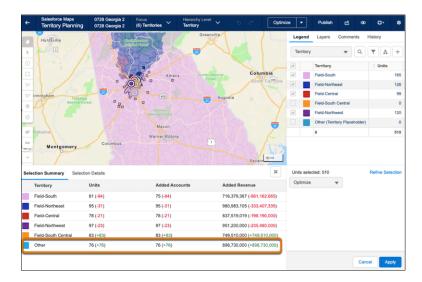
Take advantage of new placeholder options available during alignment optimization in Salesforce Maps Territory Planning. Add another level to your territory balancing efforts when you allocate units to, from, or excluding placeholder areas.

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

How: When you're optimizing an alignment with placeholder areas, easily select how you want to allocate units. Maybe you're not sure if you have the right number of territories in your alignment. You want to see how an additional territory affects the unit distribution after balancing territories. You assign units to placeholders so the placeholder area is included in the unit distribution.

Before committing units to a new territory, view the unit assignment changes in the Selection Summary, and then decide if you want to apply them.

Map New and Updated Boundaries

Discover the latest boundaries available that provide more options for creating territories in Salesforce Maps Territory Planning. When you create datasets and plan territories, select specific areas using new and updated geographic territory boundaries such as postal codes.

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

How: Select a type of territory boundary for each country in the datasets that you create in Salesforce Maps Territory Planning.

Country	Boundary
Australia	Postal Code
Canada	Province
	Forward Sortation Area
France	Postal Code
Germany	Postal Code
Switzerland	Postal Code
United States	State
	County
	3-Digit Postal Code
	Postal Code

Other Enhancements in Salesforce Maps Territory Planning

Create exact unit assignments and update Salesforce fields without worrying about publishing failures. Take advantage of bulk imports for high data volumes, and specify which users can publish to active territory models.

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

Why: Enhancements include:

- Assign Units to Any Area: Ensure that every unit belongs to the exact area you want, regardless of its position in the alignment's hierarchy. Assign units in the placeholder area into another area of your choice. Resolving assignment outliers with accuracy means you have more options when distributing accounts to specific reps.

- Added Flexibility for Updating Salesforce Fields: Publish Territory Planning data to Salesforce even when some of that data generates errors because of mismatched or missing fields. Errors appear in a CSV log file, which you can download. Fix any errors, and then publish again.

- Perform Bulk Record Import for Datasets and Alignments: Import more than 50,000 records without encountering Salesforce governor limits when you enable Bulk API in Data Management settings. Creating datasets with high data volumes requires that you select SOQL queries as your data sources. But creating alignments with high data volumes doesn't require that your datasets include SOQL queries as their data sources.

- Control Who Can Publish to Active Territory Models: In Territory Planning Publish Options, specify whether any users, all users, or only approved users can publish alignments to active models in Enterprise Territory Management.

Salesforce Maps Mobile

Call accounts, leads, and contacts directly from the map using the Salesforce mobile app.

IN THIS SECTION:

[Make Calls from the Map in the Salesforce Mobile App](#)
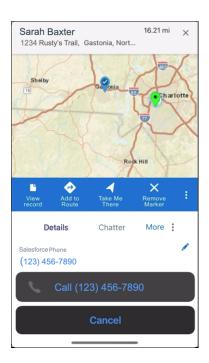
Close more sales and serve more customers when you make calls directly from the map. Between visits in the field, Salesforce Maps Mobile makes it easy for reps to call accounts, leads, and contacts. Linked phone numbers on the map save reps the hassle of searching other pages and entering numbers manually.

Make Calls from the Map in the Salesforce Mobile App

Close more sales and serve more customers when you make calls directly from the map. Between visits in the field, Salesforce Maps Mobile makes it easy for reps to call accounts, leads, and contacts. Linked phone numbers on the map save reps the hassle of searching other pages and entering numbers manually.

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

How: To make calls from Salesforce Maps Mobile, locate and click the number that you want to dial.

Sales Cloud Einstein

The lead and opportunity scoring model refresh schedule changed.

IN THIS SECTION:

Einstein Scoring Model Update Timing Changed

To improve performance, the lead and opportunity models are refreshed once a month. Previously, they were refreshed every 10 days.

SEE ALSO:

Einstein Release Notes

Einstein Scoring Model Update Timing Changed

To improve performance, the lead and opportunity models are refreshed once a month. Previously, they were refreshed every 10 days.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Unlimited editions. Einstein Lead Scoring and Einstein Opportunity Scoring are available for an extra cost in Enterprise Edition.

When: This change takes effect the first week of October 2022.

SEE ALSO:

Salesforce Help: Understand How Einstein Scores Your Leads

Salesforce Help: Understand How Einstein Scores Your Opportunities

Sales Cloud for Slack (Generally Available)

Sales teams can access, update, and share records, manage their pipelines, and get important notifications about key accounts and opportunities directly from Slack. Check it out by trying the Sales Cloud for Slack app. Maintain a healthy pipeline by bringing teams together to collaborate in account- and opportunity-focused Slack channels with Salesforce data at their fingertips. Stay on top of opportunity movements by automating deal updates to the team, pushed into Slack from Salesforce. And cultivate best practices on team selling by using Slack as your platform to engage cross-functional partners and make real-time Salesforce data easily accessible to those who need it.

Where: The Sales Cloud for Slack app works with Sales Cloud in Lightning Experience for Enterprise, Performance, Unlimited, and Developer editions. Available for use where approved by a workspace admin and installed in Slack.

Who: Users must have a permission set with these permissions: Connect Salesforce with Slack and Slack Sales User. Specific features require more permissions.

Why: Continue to collaborate with colleagues in Slack while accessing these important sales features.

- See, update, and share accounts, contacts, leads, and opportunities.
- See and manage your sales pipeline.
- Build your own Slack record views for standard and custom objects to see the fields you need.
- Get reminders in Slack about upcoming close dates, unchanged stages, and unchanged next steps for opportunities that you own. Using Notification Builder, create custom notifications and edit our preconfigured notification flows.
- Drive discussion on key deals using sales channels. From Slack or Salesforce, link accounts and opportunities to Slack channels. Channel members get notified in Slack when records are updated. Plus, teams can find sales channels easily from a related list on their Salesforce records.
- Streamline important announcements in Slack using feed channels. Feed channels automatically announce when deals with a high probability of closing are won or increase in value so everyone on your team can stay in the loop.
- Use Flow Builder to invoke Slack actions based on Salesforce behaviors. For example, automatically create Slack channels when new deals are introduced that are above a certain dollar amount.

How: To start using Sales Cloud for Slack right away, work with your Slack workspace admin to configure setup in Salesforce and Slack.

SEE ALSO:

    Salesforce Help: Manage Salesforce Records in Slack

    Salesforce Help: View Your Team's Pipeline in Slack

    Salesforce Help: Set Up Sales Cloud for Slack App Notifications

    Salesforce Help: Sell with Your Team in Sales Channels

    Salesforce Help: Activate a Feed Channel

Integration with Google

Reps can manage record associations in their Gmail integration. Confirm reps are using the minimum browser integration.

IN THIS SECTION:

Gmail Integration

Reps can manage record associations for emails and events in their Gmail integration.

Lightning Sync for Google

Streamline your move to Einstein Activity Capture using the Lightning Sync migration assistant.

Gmail Integration

Reps can manage record associations for emails and events in their Gmail integration.

Manage Associations Easily in Gmail

Emails and events that Einstein Activity Capture users create in their Gmail integration are captured and automatically associated to related records. Now users can change these automatic associations from their integration. They can remove some or all the associations between an email or event and related records, or add new associations. Previously, users could make these changes only in Salesforce.

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

Who: Users must be assigned to an Einstein Activity Capture configuration where email and event syncing is enabled. The sync direction in the configuration impacts the ability to manage record association.

SEE ALSO:

Salesforce Help: Emails and Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Help: Guidelines for Using Events with Einstein Activity Capture (can be outdated or unavailable during release preview)

Confirm Browser Version for Gmail Integration

When integrating with Gmail, the browser must be Google Chrome version 97 or later. We recommend running the most recent stable version.

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

SEE ALSO:

Salesforce Help: Confirm Browser Version for Gmail Integration (can be outdated or unavailable during release preview)

Lightning Sync for Google

Streamline your move to Einstein Activity Capture using the Lightning Sync migration assistant.

Streamline Your Move to Einstein Activity Capture

If you're on Lightning Sync for Google, you can now use the Lightning Sync migration assistant for a quick and easy move to Einstein Activity Capture. The assistant checks whether you're ready to migrate, prepares you to manage product differences, and then moves your settings from Lightning Sync to Einstein Activity Capture. Previously, the migration assistant was available only for customers who connect to Salesforce using Microsoft Exchange.

Streamline Your Move to Einstein Activity Capture

If you're on Lightning Sync for Google, you can now use the Lightning Sync migration assistant for a quick and easy move to Einstein Activity Capture. The assistant checks whether you're ready to migrate, prepares you to manage product differences, and then moves your settings from Lightning Sync to Einstein Activity Capture. Previously, the migration assistant was available only for customers who connect to Salesforce using Microsoft Exchange.

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

Why: Einstein Activity Capture is our long-term solution for syncing contacts and events between Google applications and Salesforce. With Einstein Activity Capture, you benefit from productivity-boosting features beyond sync. Plus, we continue to enhance features and availability to deliver an enterprise solution to meet your email integration needs.

How: From Setup, in the Quick Find Box, enter `Gmail Integration and Sync`. If the migration assistant is supported for you, under the Lightning Sync section, you see a new section called Migrate to Einstein Activity Capture. To kick off the migration assistant, click **Explore Migration**.

The migration assistant guides you through the process. When you're ready to complete your migration, you assign Einstein Activity Capture user permissions to your users and turn off Lightning Sync.

Salesforce Help: Compare Einstein Activity Capture and Lightning Sync (can be outdated or unavailable during release preview)

Salesforce Help: Move from Lightning Sync to Einstein Activity Capture (can be outdated or unavailable during release preview)

Connect Google to Salesforce with a Service Account

Integration with Microsoft®

Reps can manage record associations in their Outlook integration.

IN THIS SECTION:

Outlook Integration

Reps can manage record associations for emails and events in their Outlook integration. And it's more efficient to log events on someone else's behalf.

Lightning Sync for Microsoft® Exchange

If you use Exchange Online and the service account connection method, review Microsoft's announcements on basic authentication retirement. If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture.

Salesforce for Outlook

Full product retirement for Salesforce for Outlook is scheduled 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

Reps can manage record associations for emails and events in their Outlook integration. And it's more efficient to log events on someone else's behalf.

IN THIS SECTION:

Manage Associations Easily in Outlook

Emails and events that Einstein Activity Capture users create in their Outlook integration are captured and automatically associated to related records. Now users can change these automatic associations from their integration. They can remove some or all the associations between an email or event and related records, or add new associations. Previously, users could make these changes only in Salesforce.

Log Delegated Events Flawlessly with Outlook Integration

Logging events on behalf of someone else is easier now in Outlook integration. When a delegate logs events from a shared Outlook calendar, the event appears in Salesforce with the delegator as the event owner and organizer. And if the delegate is going to the event, they're added to the event as an attendee. Previously, someone had to update the owner and add the delegate to the event as an attendee.

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

Who: Users must be assigned to an Einstein Activity Capture configuration where email and event syncing is enabled. The sync direction in the configuration impacts the ability to manage record association.

SEE ALSO:

Salesforce Help: Emails and Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Help: Guidelines for Using Events with Einstein Activity Capture (can be outdated or unavailable during release preview)

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

SEE ALSO:

Salesforce Help: Considerations for Outlook Shared Folders in Outlook Integration (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Event Logging from Outlook and Gmail (can be outdated or unavailable during release preview)

Salesforce Help: Guidelines for Logging Events from Outlook and Gmail to Salesforce (can be outdated or unavailable during release preview)

Lightning Sync for Microsoft® Exchange

If you use Exchange Online and the service account connection method, review Microsoft's announcements on basic authentication retirement. If you're ready to make the move to our latest contact and event sync product, check out what's new with Einstein Activity Capture.

IN THIS SECTION:

Review Microsoft Announcements on Basic Authentication Retirement for Exchange Online

In October 2022, Microsoft retires basic authentication for Exchange Online. If you use Exchange Online and the service account connection method, contacts and events stop syncing when basic authentication retires. To avoid sync interruption, you must move to an alternative connection method before basic authentication retires.

Review Microsoft Announcements on Basic Authentication Retirement for Exchange Online

In October 2022, Microsoft retires basic authentication for Exchange Online. If you use Exchange Online and the service account connection method, contacts and events stop syncing when basic authentication retires. To avoid sync interruption, you must move to an alternative connection method before basic authentication retires.

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

Who: If you use Lightning Sync, and use Exchange Online and the service account connection method, you must move to an alternative connection method to continue syncing. If you use Exchange 2019®, Exchange 2016®, or Exchange 2013® on-premises servers, you can continue using the service account connection method and basic authentication.

How: Work with your Microsoft admin or IT professional to determine whether retirement affects you. Then move to an alternative connection method. We recommend that you migrate to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft applications and Salesforce. To continue using Lightning Sync, move to the OAuth 2.0 connection method.

SEE ALSO:

External Link: Deprecation of Basic authentication in Exchange Online (can be outdated or unavailable during release preview)

Knowledge Article: Availability of the Lightning Sync Service Account Connection Method for Customers on Microsoft Office 365 (can be outdated or unavailable during release preview)

Salesforce Help: Move from Lightning Sync to Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Help: Connect Salesforce and Microsoft® Exchange Using OAuth 2.0 (can be outdated or unavailable during release preview)

Salesforce for Outlook

Full product retirement for Salesforce for Outlook is scheduled 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 Is Retiring in June 2024

Full product retirement for Salesforce for Outlook is scheduled for June 2024. For the latest integration with Microsoft Outlook, we 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 Is Retiring in June 2024

Full product retirement for Salesforce for Outlook is scheduled for June 2024. For the latest integration with Microsoft Outlook, we 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.

SEE ALSO:

Trailblazer Community: Salesforce for Outlook Release Notes (can be outdated or unavailable during release preview)

Salesforce CMS

Enhanced CMS workspaces are now generally available.

IN THIS SECTION:

Take Advantage of the Enhanced Sites and Content Platform (Generally Available)

The enhanced sites and content platform brings together the power of Salesforce CMS and LWR sites. With this flexible new platform, you can create enhanced CMS workspaces in the Digital Experiences app so you can easily create, manage, and publish your content. Manage content in multiple languages, harness the organizational power of content collections, and then share your content with enhanced LWR sites.

Salesforce CMS Workspaces Limited to 2,000

To improve Salesforce CMS performance, each instance is limited to 2,000 workspaces. This limit includes CMS workspaces and enhanced CMS workspaces.

Salesforce CMS Channels Limited to 300

To improve Salesforce CMS performance, each instance is limited to 300 channels. This limit doesn't include Experience Cloud sites connected to CMS workspaces.

Take Advantage of the Enhanced Sites and Content Platform (Generally Available)

The enhanced sites and content platform brings together the power of Salesforce CMS and LWR sites. With this flexible new platform, you can create enhanced CMS workspaces in the Digital Experiences app so you can easily create, manage, and publish your content. Manage content in multiple languages, harness the organizational power of content collections, and then share your content with enhanced LWR sites.

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

Connect REST API and Connect in Apex support enhanced CMS workspaces.

SEE ALSO:

Do More with the Enhanced Sites and Content Platform (Generally Available)

Salesforce CMS Workspaces Limited to 2,000

To improve Salesforce CMS performance, each instance is limited to 2,000 workspaces. This limit includes CMS workspaces and enhanced CMS workspaces.

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

Salesforce CMS Channels Limited to 300

To improve Salesforce CMS performance, each instance is limited to 300 channels. This limit doesn't include Experience Cloud sites connected to CMS workspaces.

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

Salesforce Flow

New capabilities in Flow 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.

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

The OmniStudio Admin permission set license has been renamed OmniStudio and there are now two permissions sets available with it, OmniStudio Admin and OmniStudio User. After using the OmniStudio Migration Tool to migrate from custom objects to standard objects, you can edit migrated standard content. Create a version of a standard DataRaptor. Modify standard OmniStudio content by creating versions of a standard component. Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard. Standard OmniSscript features not available in the previous release, are now supported in this release.

Flow Builder

Cut and paste flow elements in auto-layout. View all incoming Go To connections in the Toolbox. Use Formula Builder in Flow Resources and Collection Filters. Use `ISCLONE` in record-triggered flow formulas. Create, save, and run tests for flows in Flow Builder. Use more screen flow components in Slack.

Flow Orchestration

Assign orchestration work items to credentialed Experience Cloud site visitors. Use role hierarchies and sharing rules with the Manage Orchestration Runs and Work Items user permission to control access to Flow Orchestration objects. Create reports with Flow Orchestration objects.

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 Flow Integration release notes and help, see *MuleSoft Composer for Salesforce*.

OmniStudio

The OmniStudio Admin permission set license has been renamed OmniStudio and there are now two permissions sets available with it, OmniStudio Admin and OmniStudio User. After using the OmniStudio Migration Tool to migrate from custom objects to standard objects, you can edit migrated standard content. Create a version of a standard DataRaptor. Modify standard OmniStudio content by creating versions of a standard component. Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard. Standard OmniSscript features not available in the previous release, are now supported in this release.

Where: OmniStudio is available in Enterprise, Performance, and Unlimited editions and works with Lightning Experience, Experience Builder sites, and all versions of the mobile app.

Who: OmniStudio is available to select Industry Cloud customers.

> **Note:** For OmniStudio major and minor release notes published before October 14, 2022, see OmniStudio Release Notes Archive.

> **Important:** All release notes for minor releases are published in the current release notes section, regardless of the release the minor update is for. For example, if the current release is Winter '23, and there are minor updates to the Spring '22 and Winter '23 packages, those release notes will be available in the Winter '23 OmniStudio Release Notes section. If the current release is Spring '23, and there are minor release updates for Summer '22 and Spring '22 packages, those release notes will be available in the Spring '23 Release Notes section.

IN THIS SECTION:

OmniStudio Winter '23 Updates

The OmniStudio Admin permission set license has been renamed OmniStudio and there are now two permissions sets available with it, OmniStudio Admin and OmniStudio User. Modify standard OmniStudio content by creating versions of an OmniStudio component. Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard component. When Standard OmniStudio Runtime is enabled, the SDK data source isn't supported. Home page now supports standard FlexCards. Embed a standard component or a Salesforce Lightning component with the Custom LWC element in a FlexCard. Add a FlexCard to an LWR Experience site only when Standard OmniStudio Runtime is disabled. Date input element supports DD-MM-YYYY or DD/MM/YY format. Features previously not supported for standard OmniScripts are supported. StepChart, Modal, and SaveForLaterAcknowledge override on standard OmniScripts aren't supported. DataRaptors now support versioning.

OmniStudio Minor Release Updates

This page provides details about OmniStudio updates made after the Winter '23 major release and before the next major release. Download the PDF to view bug fixes, minor updates, and known issues. The updates apply to OmniStudio customers on the standard objects model.

OmniStudio for Vlocity Winter '23 Updates

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. After migrating custom objects to standard objects with the OmniStudio Migration tool, customers can now edit the standard object versions of migrated content. Date input element supports DD-MM-YYYY or DD/MM/YY format.

OmniStudio for Vlocity Minor Release Updates

This page provides details about OmniStudio for Vlocity updates made after the Winter '23 major release and before the next major release. Download the PDF to view bug fixes, minor updates, and known issues. The updates apply to OmniStudio for Vlocity customers on the custom objects model.

OmniStudio Release Notes Archive

See this page for OmniStudio and OmniStudio for Vlocity release notes published before October 14, 2022. The release notes describe enhancements and fixes in major and minor releases for OmniStudio.

OmniStudio Winter '23 Updates

The OmniStudio Admin permission set license has been renamed OmniStudio and there are now two permissions sets available with it, OmniStudio Admin and OmniStudio User. Modify standard OmniStudio content by creating versions of an OmniStudio component. Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard component. When Standard OmniStudio Runtime is enabled, the SDK data source isn't supported. Home page now supports standard FlexCards. Embed a standard component or a Salesforce Lightning component with the Custom LWC element in a FlexCard. Add a FlexCard to an LWR Experience site only when Standard OmniStudio Runtime is disabled. Date input element supports DD-MM-YYYY or DD/MM/YY format. Features previously not supported for standard OmniScripts are supported. StepChart, Modal, and SaveForLaterAcknowledge override on standard OmniScripts aren't supported. DataRaptors now support versioning.

Who: The following release updates are for OmniStudio customers on the standard objects model. OmniStudio for Vlocity customers on the custom objects model, see OmniStudio for Vlocity Winter '23 Updates.

IN THIS SECTION:

One Primary OmniStudio Permission Set License

The OmniStudio User permission set license's standard permission set is now part of the OmniStudio Admin permission set license (PSL) so that there's one primary OmniStudio PSL. The OmniStudio Admin PSL has also been renamed OmniStudio.

Standard OmniStudio Content Updates

Standard OmniStudio components run natively in your Salesforce org without enabling Standard OmniStudio Runtime. OmniScript and FlexCard standard components are visible in the Lightning and Experience Builders and render standard OmniStudio content. Standard OmniStudio content is visible in the OmniStudio product home screens along with your custom OmniStudio content. To modify standard components, create a version.

Standard OmniStudio Runtime Enhancements

When Standard OmniStudio Runtime is enabled, OmniStudio FlexCard and OmniScript Designers don't generate FlexCards and OmniScripts on activation. For Orgs where a FlexCard or OmniScript LWC has already been generated, if you enable Standard OmniStudio Runtime and activate a component, the LWC automatically uses the standard runtime. If your admin, you can view and modify a standard FlexCard or OmniScript in the Designers, enable Standard OmniStudio Runtime and install Winter '23 or later managed package. When Standard OmniStudio Runtime is enabled and the org has the OmniStudio permission set license, end users can view a standard FlexCard or OmniScript in a Lightning page or Experience site page.

OmniStudio FlexCards

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard component. When Standard OmniStudio Runtime is enabled, the SDK data source isn't supported. Home page now supports standard FlexCards. Embed a standard component or a Salesforce Lightning component with the Custom LWC element in a FlexCard. Add a FlexCard to an LWR Experience site only when Standard OmniStudio Runtime is disabled. Date input element supports DD-MM-YYYY or DD/MM/YY format.

Standard OmniScripts Features Supported and Not Supported

Features previously not supported for standard OmniScripts are supported. StepChart, Modal, and SaveForLaterAcknowledge override on standard OmniScripts aren't supported.

Create a New Version of an OmniStudio for Vlocity DataRaptor

Create a version of a DataRaptor to modify an existing one. Create different versions of a DataRaptor by enabling DataRaptor Versioning and OmniStudio Metadata in OmniStudio Settings.

One Primary OmniStudio Permission Set License

The OmniStudio User permission set license's standard permission set is now part of the OmniStudio Admin permission set license (PSL) so that there's one primary OmniStudio PSL. The OmniStudio Admin PSL has also been renamed OmniStudio.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model.

Why: Customers no longer have to create their own OmniStudio User permission set.

How: In your org, go to Setup and search for User Permissions in the Quick Find. Notice that the OmniStudio User and the OmniStudio Admin permission sets have the same OmniStudio PSL.

SEE ALSO:

OmniStudio Permission Sets Licenses

Standard OmniStudio Content Updates

Standard OmniStudio components run natively in your Salesforce org without enabling Standard OmniStudio Runtime. OmniScript and FlexCard standard components are visible in the Lightning and Experience Builders and render standard OmniStudio content. Standard OmniStudio content is visible in the OmniStudio product home screens along with your custom OmniStudio content. To modify standard components, create a version.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model.

SEE ALSO:

Standard OmniStudio Content and Runtime

Standard OmniStudio Runtime Enhancements

When Standard OmniStudio Runtime is enabled, OmniStudio FlexCard and OmniScript Designers don't generate FlexCards and OmniScripts on activation. For Orgs where a FlexCard or OmniScript LWC has already been generated, if you enable Standard OmniStudio Runtime and activate a component, the LWC automatically uses the standard runtime. If your admin, you can view and modify a standard FlexCard or OmniScript in the Designers, enable Standard OmniStudio Runtime and install Winter '23 or later managed package. When Standard OmniStudio Runtime is enabled and the org has the OmniStudio permission set license, end users can view a standard FlexCard or OmniScript in a Lightning page or Experience site page.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model.

How: See Standard OmniStudio Content and Runtime.

OmniStudio FlexCards

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. Reference a packaged custom label from a standard FlexCard component. When Standard OmniStudio Runtime is enabled, the SDK data source isn't supported. Home page now supports standard FlexCards. Embed a standard component or a Salesforce Lightning component with the Custom LWC element in a FlexCard. Add a FlexCard to an LWR Experience site only when Standard OmniStudio Runtime is disabled. Date input element supports DD-MM-YYYY or DD/MM/YY format.

Who: For OmniStudio customers on the standard obects model.

IN THIS SECTION:

Standard FlexCards Aren't Supported on LWR Sites

To add a FlexCard to an LWR Experience site, Standard OmniStudio Runtime must be disabled. Add the generated FlexCard LWC to an LWR Experience site page.

Home Page Support for Standard FlexCards

Add a standard FlexCard component to a Lightning Home page.

Embed a Standard Component or a Salesforce Lightning Component as a Custom LWC

Embed a standard component or Salesforce Lightning component as a custom LWC on a FlexCard.

Reference Packaged Custom Label in Standard FlexCard Component

Reference a packaged custom label in a standard FlexCard component.

Standard FlexCard Doesn't Support SDK Data Source

The FlexCard standard component doesn't support the SDK data source. If you open a FlexCard previously created with an SDK data source, you see an error in the FlexCard Designer.

Enable Continuation on FlexCards

Enable continuation on FlexCards that call a long-running Integration Procedure using an HTTP action or a Remote Action.

Data Update and Datasource Actions Support SOSL and SOQL

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources.

FlexCard Date Input Element Format Support

In the Date input element, enter DD/MM/YYYY or DD-MM-YYYY as the date format.

Standard FlexCards Aren't Supported on LWR Sites

To add a FlexCard to an LWR Experience site, Standard OmniStudio Runtime must be disabled. Add the generated FlexCard LWC to an LWR Experience site page.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the standard objects model version of OmniStudio.

Why: The standard FlexCard component can't be added to an LWR Experience Cloud site due to an API limitation.

How: From the list of custom components in the Experience Builder, add the generated FlexCard LWC to the Experience site page.

Home Page Support for Standard FlexCards

Add a standard FlexCard component to a Lightning Home page.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the standard objects model version of OmniStudio.

Why: In previous release, you can't add a standard FlexCard to a Lightning Home page. As of Winter '23, you can.

How: After activating your FlexCard in the FlexCard Designer, select Home Page as the target in the Publish Options window.

Embed a Standard Component or a Salesforce Lightning Component as a Custom LWC

Embed a standard component or Salesforce Lightning component as a custom LWC on a FlexCard.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the standard objects model version of OmniStudio.

SEE ALSO:

Embed a Custom LWC Inside a FlexCard

Reference Packaged Custom Label in Standard FlexCard Component

Reference a packaged custom label in a standard FlexCard component.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the standard objects model version of OmniStudio.

How: Reference the packaged custom label in the standard component by prefixing the custom label with the org namespace followed by a double underscore, such as {Label.<namespacePrefix>__<customLabel>}.

SEE ALSO:

Add Custom Labels to Supported Fields on a FlexCard

Standard FlexCard Doesn't Support SDK Data Source

The FlexCard standard component doesn't support the SDK data source. If you open a FlexCard previously created with an SDK data source, you see an error in the FlexCard Designer.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the standard objects model version of OmniStudio.

SEE ALSO:

Configure an SDK Data Source on a FlexCard

Enable Continuation on FlexCards

Enable continuation on FlexCards that call a long-running Integration Procedure using an HTTP action or a Remote Action.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

Why: Use the Continuation class in Apex to make a long-running request to an external Web service.

How: From the OmniStudio FlexCards home page, open a FlexCard with an Integration Procedure data source. In the Data Source section of the Setup panel, add the key/value pair **useContinuation = true** in the Options Map.

SEE ALSO:

Continuation in Long-Running Calls

Data Update and Datasource Actions Support SOSL and SOQL

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

SEE ALSO:

Call a Data Source from an Action on a FlexCard

Update a Data Source from an Action on a FlexCard

FlexCard Date Input Element Format Support

In the Date input element, enter DD/MM/YYYY or DD-MM-YYYY as the date format.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

Standard OmniScripts Features Supported and Not Supported

Features previously not supported for standard OmniScripts are supported. StepChart, Modal, and SaveForLaterAcknowledge override on standard OmniScripts aren't supported.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model.

SEE ALSO:

OmniScript Standard Component Features Not Supported

Create a New Version of an OmniStudio for Vlocity DataRaptor

Create a version of a DataRaptor to modify an existing one. Create different versions of a DataRaptor by enabling DataRaptor Versioning and OmniStudio Metadata in OmniStudio Settings.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model.

How: Enable DataRaptor Version and OmniStudio Metadata in OmniStudio Settings. Open a DataRaptor from the OmniStudio DataRaptors home page. Click **Create New Version**.

SEE ALSO:

Create a Version of a DataRaptor

OmniStudio Minor Release Updates

This page provides details about OmniStudio updates made after the Winter '23 major release and before the next major release. Download the PDF to view bug fixes, minor updates, and known issues. The updates apply to OmniStudio customers on the standard objects model.

OmniStudio Winter '23 Minor Release Updates PDF

For the OmniStudio package links to install minor releases, see OmniStudio Release Summary for Installation and Upgrade.

OmniStudio for Vlocity Winter '23 Updates

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure. After migrating custom objects to standard objects with the OmniStudio Migration tool, customers can now edit the standard object versions of migrated content. Date input element supports DD-MM-YYYY or DD/MM/YY format.

Who: The following release updates are for OmniStudio for Vlocity customers on the custom objects model. OmniStudio customers on the standard objects model, see OmniStudio Winter '23 Updates .

IN THIS SECTION:

Edit Standard Content After Migration from Custom to Standard

For customers on the custom objects model (OmniStudio for Vlocity), after migrating custom objects to standard objects, your can now edit the standard object versions of migrated OmniStudio content.

OmniStudio for Vlocity FlexCards

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure or Apex class. Date input element supports DD-MM-YYYY or DD/MM/YY format.

Edit Standard Content After Migration from Custom to Standard

For customers on the custom objects model (OmniStudio for Vlocity), after migrating custom objects to standard objects, your can now edit the standard object versions of migrated OmniStudio content.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For customers on the custom objects model who've purchased the OmniStudio permission set license.

Why: In the Summer '22 release of the OmniStudio Migration Tool, customers can only preview what their migrated standard content looks like. Beginning Winter '23, customers can preview and modify standard content.

SEE ALSO:

Migrate OmniStudio Custom Objects to Standard Objects

OmniStudio for Vlocity FlexCards

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources. Enable continuation on FlexCards that call a long-running Integration Procedure or Apex class. Date input element supports DD-MM-YYYY or DD/MM/YY format.

Who: For OmniStudio for Vlocity customers on the custom objects model.

IN THIS SECTION:

FlexCard Date Input Element Format Support

In the Date input element, enter DD/MM/YYYY or DD-MM-YYYY as the date format.

Data Update and Datasource Actions Support SOSL and SOQL

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources.

Enable Continuation on FlexCards

Enable continuation on FlexCards that call a long-running Integration Procedure using an HTTP action or a Remote Action.

FlexCard Date Input Element Format Support

In the Date input element, enter DD/MM/YYYY or DD-MM-YYYY as the date format.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

Data Update and Datasource Actions Support SOSL and SOQL

Data and Update Datasource actions now support SOQL Query and SOSL Search data sources.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

SEE ALSO:

Call a Data Source from an Action on a FlexCard

Update a Data Source from an Action on a FlexCard

Enable Continuation on FlexCards

Enable continuation on FlexCards that call a long-running Integration Procedure using an HTTP action or a Remote Action.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

Who: For OmniStudio customers on the standard objects model and OmniStudio for Vlocity customers on the custom objects model.

Why: Use the Continuation class in Apex to make a long-running request to an external Web service.

How: From the OmniStudio FlexCards home page, open a FlexCard with an Integration Procedure data source. In the Data Source section of the Setup panel, add the key/value pair **useContinuation = true** in the Options Map.

SEE ALSO:

Continuation in Long-Running Calls

624

OmniStudio for Vlocity Minor Release Updates

This page provides details about OmniStudio for Vlocity updates made after the Winter '23 major release and before the next major release. Download the PDF to view bug fixes, minor updates, and known issues. The updates apply to OmniStudio for Vlocity customers on the custom objects model.

OmniStudio for Vlocity Winter '23 Minor Release Updates PDF

For the package links to install minor releases, visit your Industry's documentation.

OmniStudio Release Notes Archive

See this page for OmniStudio and OmniStudio for Vlocity release notes published before October 14, 2022. The release notes describe enhancements and fixes in major and minor releases for OmniStudio.

Download the PDF for all OmniStudio and OmniStudio for Vlocity release notes published before October 14, 2023 here: OmniStudio Release Notes.

Flow Builder

Cut and paste flow elements in auto-layout. View all incoming Go To connections in the Toolbox. Use Formula Builder in Flow Resources and Collection Filters. Use `ISCLONE` in record-triggered flow formulas. Create, save, and run tests for flows in Flow Builder. Use more screen flow components in Slack.

IN THIS SECTION:

Flow Builder Updates

Cut and paste flow elements in auto-layout. View all incoming go to connections in the Toolbox. Use Formula Builder in Flow Resources and Collection Filters. Use `ISCLONE` in record-triggered flow formulas. Find related records with In and Not In operators. Embed screen flows in Lightning Web Components. Control flow screen component visibility using record field values. Use external data to generate flow choices. Expand your Flow Builder canvas with a togglable Toolbox, which is now hidden by default. Use search to add elements to the Flow Builder canvas more quickly.

Flow Testing and Debugging

Create, save, and run tests for your flows in Flow Builder.

Flow Runtime

Now you can select multiple records with the Lookup component. Add a table of records to your flow screens with the new Data Table component. Versioned updates are available for flows that are configured to run on API version 56.0.

Flow and Process Management

We disabled the creation of new workflow rules, but you can still activate, deactivate, and edit them. Access your Flows from Setup Home and Automation Home.

Flow Extensions

Use more flow screen components in Slack. Set input parameters for screen flows in Slack with an invocable action.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Cut and paste flow elements in auto-layout. View all incoming go to connections in the Toolbox. Use Formula Builder in Flow Resources and Collection Filters. Use `ISCLONE` in record-triggered flow formulas. Find related records with In and Not In operators. Embed screen flows in Lightning Web Components. Control flow screen component visibility using record field values. Use external data to generate flow choices. Expand your Flow Builder canvas with a togglable Toolbox, which is now hidden by default. Use search to add elements to the Flow Builder canvas more quickly.

IN THIS SECTION:

Cut and Paste Flow Elements

Change the order of flow elements in auto-layout faster by using cut and paste. Previously, to move an element on the canvas, you copied and pasted the element then deleted the original element, and then you updated the API name of the pasted element.
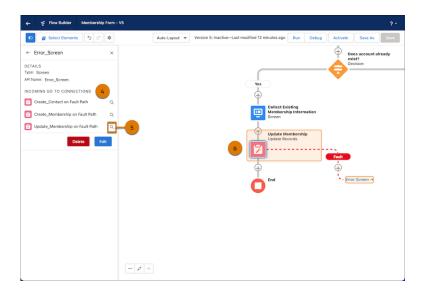
See All Incoming Go To Connections in the Toolbox

Now you can easily find incoming go to connected elements because they're listed in one place instead of spread out on the canvas.

Use Formula Builder in Flow Resources and Collection Filter Elements

You can now use an enhanced formula builder in Flow Formula-type resources and the Collection Filter element. The builder guides you through the syntax so that you can create an expression more easily. Instead of waiting until you save a flow, you can check the formula syntax and catch errors as you work.

Use ISCLONE in Record-Triggered Flow Formulas

Record-triggered flows for new and updated records now support the `ISCLONE` formula function. Copy your Process Builder or workflow rules formulas containing these functions into record-triggered flows. None of these formula functions are available in flows triggered when a record is deleted.

Use Record-Triggered Flows to Update Related Records

Now you can use record-triggered flows to update any records related to the triggering record.

Use In and Not In Operators in Flows to Find Related Records

With the new In and Not In operators, a flow accesses a collection of primitive values to get related records without using the Loop element. The flow uses fewer SOQL queries and DML statements, and performs faster. The new operators support accessing collections of type Text, Number, Date, Date/Time, Currency, and Boolean. The operators are available in the Get Records, Update Records, and Delete Records elements.

Launch Screen Flows With Lightning Web Components

Embed a screen flow from any Lightning Web Component with the new lightning-flow component. Developers can supercharge their flows by customizing finish behavior, setting custom styling, or launching flows from their Lightning Web Components. And they can offload complex input collection and branching logic to Flow, saving time and money.

Control Flow Screen Visibility Based on Dynamic Forms For Flow Picklist Values

You can now control a component's visibility based on a Dynamic Forms for Flow picklist field (record field) on the same screen. Previously, you couldn't base conditional visibility using a Dynamic Forms for Flow picklist field on the same screen.

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

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.

Generate Flow Choice Options From External Data

If your business process interacts with external data, now your users can select from it on flow screens. For example, a car dealership stores car inventory data outside of Salesforce. They have an external service to access the inventory, and now their users can select which cars to view. Previously, external data appeared on screens via Display Text or default values in inputs, but users were unable to select external data.

Filter Your Picklists By Record Type in Flow Screens

Now you only see relevant picklist values when using Dynamic Forms for Flow. Previously, all the picklist values for a field appeared, regardless of whether a record type was provided, and could show irrelevant values.

Create Record Resources With Ease

When you create a record resource from the Fields tab, now you get the correct resource type automatically, making the process easier for new users and experienced builders. Previously, you selected the resource and data type.

Specify Time Offsets in Months for Scheduled Paths

For each scheduled path on record-triggered flows, new offset options let you schedule the path to run on the same calendar day of another month. Previously, after you selected a time source for a scheduled path, you could specify offsets only in days, hours, and minutes. Also, the Configure Scheduled Paths window features clarified content.

Get More Canvas Space with the Toolbox Hidden

Now you can decide when to show the Toolbox for resource and element management while in auto-layout. The Toolbox is hidden by default.

Enjoy More Room When Building Flow Screens

Get a larger flow screen editor that follows the Salesforce Lightning Design System (SLDS) standards. Now there's more room to lay out components, such as when working with multiple columns.

Find Flow Elements Faster with Search
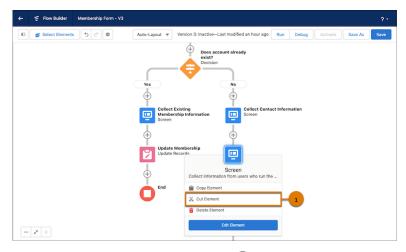
The Add Elements dialog box in the Flow Builder canvas now includes a search bar.

Cut and Paste Flow Elements
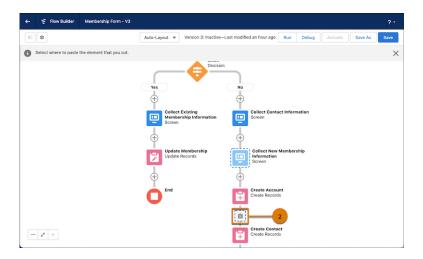
Change the order of flow elements in auto-layout faster by using cut and paste. Previously, to move an element on the canvas, you copied and pasted the element then deleted the original element, and then you updated the API name of the pasted element.

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

How: To cut an element, click the element and select Cut Element (1).

To paste the element that you cut, hover over ⊕ where you want to paste, and then click 📋 (2).

SEE ALSO:
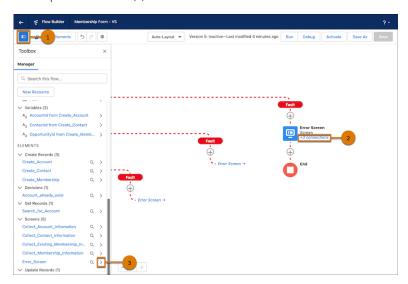
Salesforce Help: Add and Edit Elements in Auto-Layout (can be outdated or unavailable during release preview)

See All Incoming Go To Connections in the Toolbox

Now you can easily find incoming go to connected elements because they're listed in one place instead of spread out on the canvas.

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

How: Open the Toolbox (1) and click to show the details of an element with connections (2) or (3).

All incoming go to connections for that element are listed in the Toolbox (4). Click 🔍 for an incoming go to connection (5), and then focus is moved to that element on the canvas (6).

Use Formula Builder in Flow Resources and Collection Filter Elements

You can now use an enhanced formula builder in Flow Formula-type resources and the Collection Filter element. The builder guides you through the syntax so that you can create an expression more easily. 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.

How: To use the formula builder with Flow Resources, add a Formula resource to the Toolbox. To use the formula builder with the Collection Filter element, add a Collection Filter element to a flow, and then set Condition Requirements to **Formula Evaluates to True**. In the formula builder, insert a resource and a function and select an operator. Click **Check Syntax** after you build or modify each expression because the formula builder shows one error at a time.

Use ISCLONE in Record-Triggered Flow Formulas

Record-triggered flows for new and updated records now support the `ISCLONE` formula function. Copy your Process Builder or workflow rules formulas containing these functions into record-triggered flows. None of these formula functions are available in flows triggered when a record is deleted.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
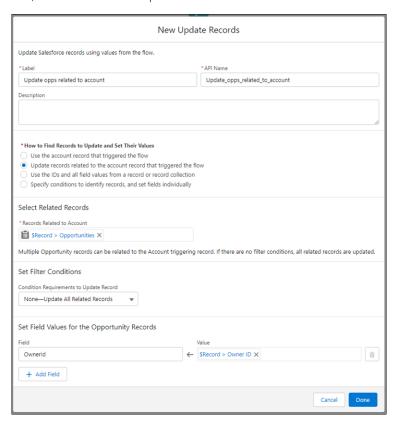
How: When copying formulas containing `ISCLONE` into record-triggered flows, use the `$Record` global variable instead of the object. For example, to use `ISCLONE (account.x)` in a record-triggered flow formula, change it to `ISCLONE ($Record.x)`.

Use Record-Triggered Flows to Update Related Records

Now you can use record-triggered flows to update any records related to the triggering record.

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

How: Use the Update Records element and select **Update records related to the** `objectName` **record that triggered the flow**. Then, select the related records you want to update. You can also set filters to update only certain related records. If you don't specify a filter, all related records are updated.
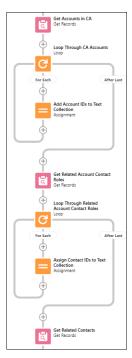
Use In and Not In Operators in Flows to Find Related Records
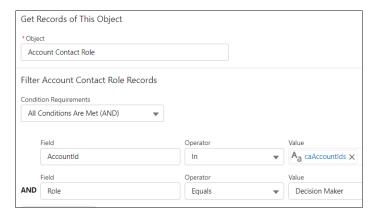
With the new In and Not In operators, a flow accesses a collection of primitive values to get related records without using the Loop element. The flow uses fewer SOQL queries and DML statements, and performs faster. The new operators support accessing collections of type Text, Number, Date, Date/Time, Currency, and Boolean. The operators are available in the Get Records, Update Records, and Delete Records elements.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
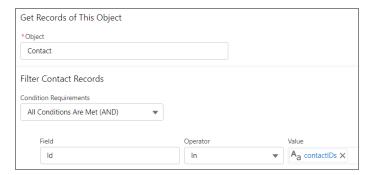
Why: To ensure your flows don't exceed governor limits, use the In operator. For example, a flow gets all related contacts if their role equals Decision Maker and if their related accounts have a shipping state in California. With the new In operator, the flow executes the Get Records element only three times. That's three SOQL queries no matter how many contacts the flow finds.

Because the In and Not In operators don't support accessing values on record collections in this release, the flow assigns the account IDs to a text collection, caAccountIds. The Get Records element gets all related account contact roles if their account IDs are in caAccountIds and if their Role equals Decision Maker.

The Get Records element gets all related contacts if their contact IDs are in contactIDs. And you're done.

Previously, the Loop element iterated over a collection of values to get related records. Each time the flow got a related record via the Loop element, the flow used one SOQL query. If the flow got over 100 records, the flow failed because it exceeded the governor limit

of 100 SOQL queries per transaction. If you debugged the flow, the debug details showed over 100 executions of the Loop and Get Records elements.

Here's some more examples of using the new operators:

- Get a list of related account contact roles if their account IDs aren't in the caAccountIds example.

- Update a collection of contacts based on an opportunity's roles when an opportunity is Closed - Won.

- Get a list of accounts in a list of countries to display in a data table.

- Get a list of records using the Record ID Collection output of the newly enhanced Lookup screen component.

- Get a list of products from a custom action that outputs a collection of IDs from an external system.

How: Add one of these flow elements: Get Records, Update Records, or Delete Records. Configure the element filters to use the In or Not In operators.

SEE ALSO:

Salesforce Help: Flow Operators in Data Elements and Record Choice Sets (can be outdated or unavailable during release preview)

Salesforce Help: Flow Data Considerations (can be outdated or unavailable during release preview)

Select Multiple Records in the Lookup Flow Screen Component

External site: trailheadapps/automation-components

Launch Screen Flows With Lightning Web Components

Embed a screen flow from any Lightning Web Component with the new lightning-flow component. Developers can supercharge their flows by customizing finish behavior, setting custom styling, or launching flows from their Lightning Web Components. And they can offload complex input collection and branching logic to Flow, saving time and money.

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

How: This example shows an LWC component with the `Survey_customers` flow API name.

```
<template>
    <lightning-flow
        flow-api-name='Survey_customers'
    >
    </lightning-flow>
</template>
```

Control Flow Screen Visibility Based on Dynamic Forms For Flow Picklist Values

You can now control a component's visibility based on a Dynamic Forms for Flow picklist field (record field) on the same screen. Previously, you couldn't base conditional visibility using a Dynamic Forms for Flow picklist field on the same screen.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.
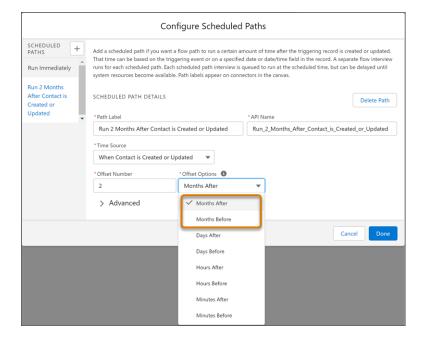
How: For example, in a case update flow, with an escalated case, prompt the user to identify whom to notify about the escalation. You use the Escalated record field from your case record variable and enable the user to choose from a list of related roles using a checkbox group. You also add a visibility rule to ensure that the checkbox group is visible only when Escalated is selected.

Two-Column Flow Layouts Are Superseded by Multicolumn Screens

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:

- 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.

Generate Flow Choice Options From External Data

If your business process interacts with external data, now your users can select from it on flow screens. For example, a car dealership stores car inventory data outside of Salesforce. They have an external service to access the inventory, and now their users can select which cars to view. Previously, external data appeared on screens via Display Text or default values in inputs, but users were unable to select external data.

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

How: Create a collection choice set and reference an Apex-defined collection from an external service, Apex action, or another screen component. Then add your collection choice set to the appropriate choice component, such as a picklist. At runtime, the picklist options are generated based on whatever data was populated in the referenced Apex-defined collection.

Filter Your Picklists By Record Type in Flow Screens

Now you only see relevant picklist values when using Dynamic Forms for Flow. Previously, all the picklist values for a field appeared, regardless of whether a record type was provided, and could show irrelevant values.

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

How: To filter picklist values by record type, set the record type ID for the record variable before using the picklist in a Screen element. At runtime, the picklist values are filtered by that record type. To continue to show all picklist values for your field use a picklist choice set instead. Or, for the record resource you're using, don't set the record type ID.

Create Record Resources With Ease

When you create a record resource from the Fields tab, now you get the correct resource type automatically, making the process easier for new users and experienced builders. Previously, you selected the resource and data type.

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

Specify Time Offsets in Months for Scheduled Paths

For each scheduled path on record-triggered flows, new offset options let you schedule the path to run on the same calendar day of another month. Previously, after you selected a time source for a scheduled path, you could specify offsets only in days, hours, and minutes. Also, the Configure Scheduled Paths window features clarified content.

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

How: When you add or edit a scheduled path, select **Months After** or **Months Before** to run the scheduled path on the same calendar day of another month.

In this scheduled path, the time source is the flow-triggering event, and the schedule is offset to run the path 2 months after the contact is created or updated.
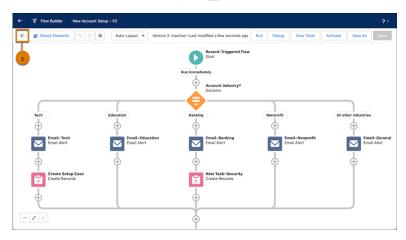
Get More Canvas Space with the Toolbox Hidden

Now you can decide when to show the Toolbox for resource and element management while in auto-layout. The Toolbox is hidden by default.

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

How: To make the Toolbox visible, click ⬚ (1).

SEE ALSO:
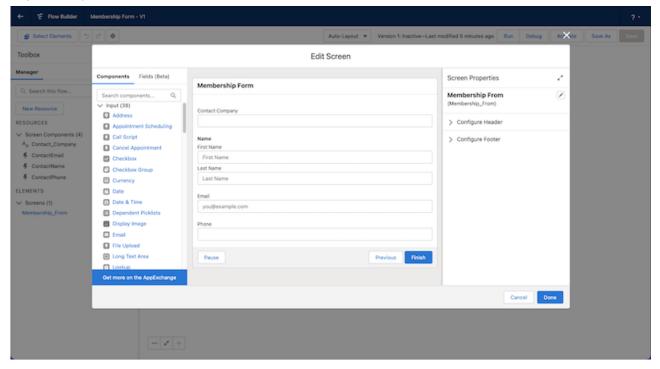
Salesforce Help: Flow Builder (can be outdated or unavailable during release preview)

Enjoy More Room When Building Flow Screens
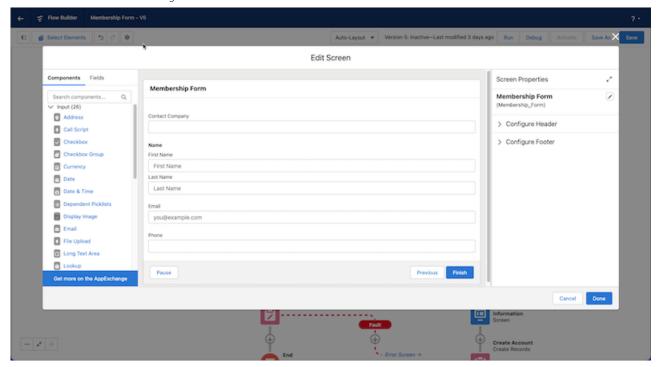
Get a larger flow screen editor that follows the Salesforce Lightning Design System (SLDS) standards. Now there's more room to lay out components, such as when working with multiple columns.

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

Why: Previously, the screen editor offered a medium canvas.

Now the screen editor offers a larger canvas.

Find Flow Elements Faster with Search

The Add Elements dialog box in the Flow Builder canvas now includes a search bar.

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

How: In the Add Element dialog box, search for the flow element to add by name. Don't search by element type. For example, instead of searching for `Action`, search for a specific action type such as `Send Email`.

Flow Testing and Debugging

Create, save, and run tests for your flows in Flow Builder.

Test One, Two, Three, Flow (Generally Available)

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. Flow tests don't support flows that run when a record is deleted. This feature, now generally available, includes some changes since the last release. Flow tests now support scheduled paths. Previously, flow tests supported only paths that run immediately. Packaging is now supported.

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

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.

SEE ALSO:

Salesforce Help: Testing Your Flow (can be outdated or unavailable during release preview)

Flow Runtime

Now you can select multiple records with the Lookup component. Add a table of records to your flow screens with the new Data Table component. Versioned updates are available for flows that are configured to run on API version 56.0.

Select Multiple Records in the Lookup Flow Screen Component

Now you can search and then select more than one record with the Lookup flow screen component. You can specify a selection maximum and one or more default records.

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

How: Add the Lookup component to your screen flow and set the Maximum Selections field to a value greater than 1.
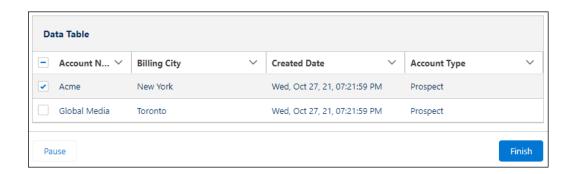
Select Multiple Records from a Table in a Flow Screen (Beta)

Leverage the new Data Table (beta) flow screen component to display a list of records on a flow screen. You can set the table to read only, or enable your users to select one or more records and use their selections later in the flow. And users can change the width of table columns and wrap or truncate overflowing text.

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

How: Add the Data Table (beta) component to your screen flow and configure the fields.

Flow Run-Time Changes in API Version 56.0

These updates affect only flows that are configured to run on API version 56.0 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.

Completed Flows No Longer Return Subflow Output Variables

If a navigation request begins in a subflow, output variables from the subflow are no longer included in the navigation response for a finished flow interview. In API version 55.0 and earlier, for navigation requests that begin in a subflow, completed flows return subflow output variables in the navigation response.

Flow and Process Management

We disabled the creation of new workflow rules, but you can still activate, deactivate, and edit them. Access your Flows from Setup Home and Automation Home.

IN THIS SECTION:

Block New Workflow Rule Creation

The next step toward retiring Workflow Rules is to disable the creation of workflow rules. You can still activate, deactivate, and edit any existing workflow rules. And you can still create automations in Flow. To test and create workflow rules for use in managed packages, developer orgs still allow you to create workflow rules.

Access Flows from Setup and Automation Home

To better reflect the future of Salesforce Flow, the action menus in Setup Home and Automation Home now link to Flows instead of Process Builder or Workflow Rules.

Block New Workflow Rule Creation

The next step toward retiring Workflow Rules is to disable the creation of workflow rules. You can still activate, deactivate, and edit any existing workflow rules. And you can still create automations in Flow. To test and create workflow rules for use in managed packages, developer orgs still allow you to create workflow rules.

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

Why: Most workflow builder use cases are now supported in and work better in Flow. We understand that migrating your workflow rules may take some time, but creating more workflow rules potentially creates more migration work later on. Use the Migrate to Flow tool to make the move. For edge cases that the Migrate to Flow tool doesn't support, refer to Equivalent Features in Flows and Workflow Rules for tips on manual migration.

SEE ALSO:

Salesforce Help: Migrate to Flow Tool Considerations (can be outdated or unavailable during release preview)

Salesforce Help: Equivalent Features in Flows and Workflow Rules (can be outdated or unavailable during release preview)

Access Flows from Setup and Automation Home

To better reflect the future of Salesforce Flow, the action menus in Setup Home and Automation Home now link to Flows instead of Process Builder or Workflow Rules.

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

Flow Extensions

Use more flow screen components in Slack. Set input parameters for screen flows in Slack with an invocable action.

IN THIS SECTION:

Use More Flow Screen Components with Flow in Slack (Beta)

Screens in flows that run in Slack can now contain these flow screen components: Checkbox, CheckboxGroup, Currency, Date, Date & Time, Number, and Text.

With the Slack Send Message to Launch Flow invocable action now you can set input parameter values for flows with text variables that are available for input.

Use More Flow Screen Components with Flow in Slack (Beta)

Screens in flows that run in Slack can now contain these flow screen components: Checkbox, CheckboxGroup, Currency, Date, Date & Time, Number, and Text.

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

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

How: In Flow Builder, build a screen flow that includes only screen components supported in Slack. When you save the flow, in the Advanced area of the Save the flow window, select the **Make Available in Slack (Beta)** checkbox.

Use Input Parameters for Screen Flows in Slack with an Invocable Action (Beta)

With the Slack Send Message to Launch Flow invocable action now you can set input parameter values for flows with text variables that are available for input.

Where: 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. Add text variables to the flow that are available for input. When you save the flow, in the Advanced area of the Save the flow window, select the **Make Available in Slack (Beta)** checkbox. Then build a second flow that includes the slackSendMessageToLaunchFlow `flowName` invocable action, where `flowName` is the API name of the flow to send. In the Set Flow Input Values section, assign text values to the input parameters.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '23, but we postponed the enforcement date to Summer '23.

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 available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

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.

Prevent Guest User from Editing or Deleting Approval Requests (Release Update)

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests.

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at runtime. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the screen. A user was able to employ the session ID to bypass security controls.

Require User Access to Apex Classes Invoked by Flow (Release Update, Retired)

This update, released in Summer '19, was retired in Summer '20. The update was previously called "Improve Security by Requiring User Access to Apex Classes Invoked by Flow."

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

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '23, but we postponed the enforcement date to Summer '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 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.

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 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 available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

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

When: This update is postponed to Winter '24. 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

Prevent Guest User from Editing or Deleting Approval Requests (Release Update)

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests.

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 Prevent Guest User from Editing or Deleting Approval Requests, follow the testing and activation steps.

SEE ALSO:

    Release Updates

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at runtime. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the screen. A user was able to employ the session ID to bypass security controls.

Where: This change applies to Lightning Experience and Salesforce Classic in 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: Before you apply this update, remove any dependencies on the $Api.Session_ID variable from your flows. Then, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. To get the Disable Access to Browser Session IDs in Flows release update, follow the testing and activation steps.

Require User Access to Apex Classes Invoked by Flow (Release Update, Retired)

This update, released in Summer '19, was retired in Summer '20. The update was previously called "Improve Security by Requiring User Access to Apex Classes Invoked by Flow."

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This update applies only to Salesforce orgs that enabled the update before its retirement.

When: This update appears in the Critical Update console and the Release Update settings page only if it was enabled in your org before Summer '20. The update is overridden by the Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update).

Why: Previously, guest users needed the Run Flows user permission to run any flow. This permission granted guest users access to run all flows, even ones that weren't intended to be run by a guest user. The release update makes sure that guest users can't execute Apex code that they don't have explicit access to by running a different flow. With the update enabled, if a flow invokes Apex code, the running flow user is required to have explicit access to that Apex class via their profile or a permission set.

Since the previous update, we provided functionality to grant permission to flows on an individual basis. That functionality is the preferred way to protect your org.

If this update was enabled in your org, the "Disable Rules for Enforcing Explicit Access to Apex Classes" release update appears. The new update returns orgs to their original state in which users only need access to the flow to run a flow that includes Apex actions.

Flow Orchestration

Assign orchestration work items to credentialed Experience Cloud site visitors. Use role hierarchies and sharing rules with the Manage Orchestration Runs and Work Items user permission to control access to Flow Orchestration objects. Create reports with Flow Orchestration objects.

IN THIS SECTION:

Assign Steps to Credentialed Experience Cloud Site Visitors

When an interactive step in an orchestration runs, it creates a work item and assigns it to a user, group, or queue. You can now assign or reassign an interactive step to a credentialed Experience Cloud site visitor. You can also assign or reassign an interactive step to a group or queue that includes only credentialed Aura site visitors or credentialed LWR site visitors.

Enable Sharing for Flow Orchestration Objects (Release Update)

After Enable Sharing for Flow Orchestration Objects is selected, the Manage Flow user permission no longer grants users access to Flow Orchestration objects. The Manage Orchestration Runs and Work Items user permission plus sharing rules and role hierarchies control user access to Flow Orchestration objects. Users who run orchestrations and execute work items must still have the Run Flows user permission.

Create Reports with Flow Orchestration Objects

You can now track your Flow Orchestration usage with Salesforce reports. Create reports that include Flow Orchestration Run, Flow Orchestration Stage Run, Flow Orchestration Step Run, and Flow Orchestration Work Item objects.

Use Subflow Elements with Evaluation Flows

Create more complex custom entry and exit conditions for orchestration stages and steps with the Subflow element in evaluation flows. And you can reuse your evaluation flows that contain common criteria. Evaluation flows can call only evaluation flows. And evaluation flows can be called only from other evaluation flows.

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

Assign Steps to Credentialed Experience Cloud Site Visitors

When an interactive step in an orchestration runs, it creates a work item and assigns it to a user, group, or queue. You can now assign or reassign an interactive step to a credentialed Experience Cloud site visitor. You can also assign or reassign an interactive step to a group or queue that includes only credentialed Aura site visitors or credentialed LWR site visitors.

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

How: In the Details panel of an interactive step, for Assignee Type, select **User**, **User Resource**, **Group**, **Group Resource**, **Queue**, or **Queue Resource**.

- For User, enter the username of the credentialed Experience Cloud site visitor.

- For User Resource, enter a resource that contains the username of the credentialed Experience Cloud site visitor.

- For Group or Queue, enter the API name of a group or queue that contains only credentialed Aura or LWR site visitors.

- For Group Resource, enter a resource that contains the API name of the group that contains only credentialed Aura or LWR site visitors.

- For Queue Resource, enter a resource that contains the API name of the queue that contains only credentialed Aura or LWR site visitors.

🛑 Important: For a user to complete an interactive step, they must have access to the associated record. Whenever you assign an interactive step to a credentialed site visitor, ensure that they have the required access to the related record.

To allow site visitors the ability to complete assigned work, in Experience Builder, add the Flow Orchestration Work Guide to a related record page in your Aura or LWR site.

So that your site visitors can view their assigned work items, in Experience Builder, add the Orchestration Work Item Object List page to your Aura or LWR site.

SEE ALSO:

Allow Site Visitors to Complete Work with the Flow Orchestration Work Guide Component

Enable Sharing for Flow Orchestration Objects (Release Update)

After Enable Sharing for Flow Orchestration Objects is selected, the Manage Flow user permission no longer grants users access to Flow Orchestration objects. The Manage Orchestration Runs and Work Items user permission plus sharing rules and role hierarchies control user access to Flow Orchestration objects. Users who run orchestrations and execute work items must still have the Run Flows user permission.

Where: This change applies to Lightning Experience in 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 Enable Sharing for Flow Orchestration Objects, follow the testing and activation steps.

Create Reports with Flow Orchestration Objects

You can now track your Flow Orchestration usage with Salesforce reports. Create reports that include Flow Orchestration Run, Flow Orchestration Stage Run, Flow Orchestration Step Run, and Flow Orchestration Work Item objects.

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

Use Subflow Elements with Evaluation Flows

Create more complex custom entry and exit conditions for orchestration stages and steps with the Subflow element in evaluation flows. And you can reuse your evaluation flows that contain common criteria. Evaluation flows can call only evaluation flows. And evaluation flows can be called only from other evaluation flows.

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

SEE ALSO:

Salesforce Help: Evaluation Flows in Orchestrations (can be outdated or unavailable during release preview)

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

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

Work Guide Refreshes After Completion of Assigned Work
Flow Orchestration users with assigned interactive steps associated with a single record are no longer required to refresh the record page after completing their screen flow. The Flow Orchestration Work Guide automatically refreshes now. If there's another work item in the assigned user's queue for that record, the component shows the next screen flow. If there isn't another work item in their queue for that record, the component tells them that there's no more work at this time.

Record Owners for New Flow Orchestration Objects

When these objects are created, their owner field is now set to the automated process user: flow orchestration run, flow orchestration stage run, and flow orchestration step run records. When interactive steps create flow orchestration work items for an assigned user, the owner field is set to the assignee. When a flow orchestration work item is reassigned to a user, the owner field is set to the new assignee. When interactive steps create flow orchestration work items assigned to a group or queue, the owner field is set to the automated process user. When a flow orchestration work item is reassigned to a group or queue, the owner field is set to the automated process user.

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.

Security, Identity, and Privacy

Help your users do their jobs safely with a range of new options and security tools. Enhanced Domains enforcement begins. The Auto-Enable Multi-Factor Authentication (MFA) release update is available for orgs with fewer than 100 active users. Fine-tune how you manage consent preferences with Preference Manager, now generally available. Access even more event log file types with Event Monitoring, more security setting details with Security Center, and a host of other security enhancements.

IN THIS SECTION:

Domains

Enhanced domains are enabled for you in sandboxes and non-production orgs. Identify and understand My Domain redirections, and review new guidance on planning for a My Domain change and updating authentication when your login URL changes. Update your allowlists for partitioned domains in non-production orgs. Include Server Name Identification for custom domain requests, and custom domains can use customer-owned certificates in all orgs.

Identity and Access Management

The Auto-Enable Multi-Factor Authentication (MFA) release update is available for orgs with fewer than 100 active users. You can block the OAuth user-agent flow to prevent security risks. To share information between Salesforce and third-party apps, you can set up the OAuth 2.0 client credentials flow. Beginning in November 2022, metadata API responses for authentication providers no longer include consumer secrets. As part of regular maintenance, Salesforce is upgrading its SAML framework.

Privacy Center

The Preference Manager app, formerly called Preference Center, is now generally available. Customize forms made from consent templates with a new panel in Preference Builder, and easily create access tokens from the Preference Manager dashboard.

Salesforce Shield

Use the Hostname Redirects event type to see which domains redirect. Monitor how Salesforce Connect adapters for Amazon Athena and Amazon DynamoDB perform. See larger, more reliable initial datasets in Event Monitoring Analytics app with the append dataset configuration enabled (beta). And now you can include encrypted fields in predictive models used by Einstein apps in Hyperforce (pilot).

Security Center

Create more security custom report types. Evaluate your security posture using new settings on Health Check. View who installed a package. See more information about individual tenants, including the sandbox name. And track single sign-on (SSO) and multi-factor authentication (MFA) logins to connected tenants.

Enable content sniffing protection via a release update and you can block untrusted external redirections. Take control of external authorization with a new, extensible Named Credential schema. Review new documentation about how to manage your cookies more effectively. Private Connect support for AWS integrations is available in new regions in Europe, Asia, and South America. Reprovision your inbound and outbound connections before Private Connect legacy network is retired.

Domains

Enhanced domains are enabled for you in sandboxes and non-production orgs. Identify and understand My Domain redirections, and review new guidance on planning for a My Domain change and updating authentication when your login URL changes. Update your allowlists for partitioned domains in non-production orgs. Include Server Name Identification for custom domain requests, and custom domains can use customer-owned certificates in all orgs.

IN THIS SECTION:

To comply with the latest browser and security standards, enable and deploy enhanced domains. 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 deploy enhanced domains before this update is enforced. This update, originally named Enable Enhanced Domains, was first made available in Summer '21 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Winter '24. Enhanced domains are deployed for you in sandboxes and non-production orgs in Winter '23 and deployed in all orgs in Spring '23. You can postpone each of those deployments to the next release via an org-level setting.

To ensure that you have adequate time to prepare, test, and make necessary adjustments, the timeline for enhanced domains changed. Enhanced domains are still deployed for you in Spring '23, but now you can opt out of that deployment before Spring '23 and disable the feature in that release. If you haven't deployed enhanced domains before Summer '23, enhanced domains are deployed for you when you get that release. The enforcement of enhanced domains is postponed to Winter '24. With that enforcement, enhanced domains are deployed for you and can't be disabled. We continue to encourage you to deploy this high-impact feature before Salesforce deploys it for you.

To identify the previous My Domain hostnames that Salesforce redirects for you, enable event logging for those redirections. Redirection event information is captured in the Hostname Redirects event type. You can determine the hostnames to update and test after you deploy a My Domain change, including when you enable enhanced domains.

Whether you change your My Domain to adopt enhanced domains, to update your brand, or to enable partitioned domains, the URLs that Salesforce hosts for your org change. Those changes can have a large impact, and making the required updates can seem like a daunting project. To make the process as smooth as possible for you, your users, and your customers, Salesforce Help now includes guidance on planning for a My Domain Change. Review the high-level steps, recommended practices, and how to reduce the impact on your users and customers. Use example checklists to plan your project, and review expanded guidance on the updates to make after a My Domain change.

Learn More About My Domain Hostnames and Redirections

After you deploy a change to your My Domain, Salesforce redirects multiple hostnames. To help you better understand these redirections and their impact, Salesforce Help includes new and updated reference pages. The new content explains the three categories of My Domain hostname redirections, how to disable those redirections, and the redirections that stop in Winter '24. To help you determine whether a hostname is used in your org, another new Salesforce Help page documents each hostname's purpose. The documentation on the URLs to update when you enable enhanced domains now includes URL formats used before My Domain was enforced. Hostnames that are no longer in use are removed from the My Domain URL reference tables, and these tables now indicate which hostnames are reserved for future use.

Review New Guidance on Updating Authentication After a My Domain Change

When your My Domain or site login URL changes, authentication methods such as single sign-on (SSO) and multi-factor authentication (MFA) can stop working. Minimize disruption during these changes with expanded guidance on the pre-deployment steps to preserve your admins' access. Then determine whether the change requires authentication updates, and use new instructions to work with third parties to update your authentication settings.

Include the Server Name Indicator (SNI) Extension for Custom Domain Requests

If your custom domain uses your HTTPS certificate, update your API client callers to include the SNI extension. This ensures you get the correct SSL certificate for incoming custom domain requests without common name mismatch errors, which could prevent an HTTPS connection.

Serve Your Custom Domain with Your Certificate in Hyperforce

Now your custom domain can use your HTTPS certificate in Hyperforce. A custom domain, such as https://www.example.com, serves your public-facing Experience Cloud sites or Salesforce Sites.

Test Custom Domains That Use Your Certificate in a Sandbox

Test custom domains, such as https://www.example.com, that use your HTTPS certificate to serve your public-facing Experience Cloud sites or Salesforce Sites. Before you enable a new or updated custom domain in production, verify the domain in a sandbox. With this change, Custom Domains in Sandbox supports customer-owned HTTPS certificates in all orgs.

Use Partitioned Domains in Non-Production Orgs

To maximize the availability of your orgs, My Domain uses partitioned domains for new sandboxes, Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which allows Salesforce to gradually roll out service delivery changes. To ensure continued access to all your orgs, update your allowlists for the new domains. To include your existing Developer Edition org in the Salesforce deployment schedule for that org type, enable partitioned domains.

Test Your Custom Domain Subdomains

To improve your site's security, custom domain subdomains can no longer use cookies set by the custom domain. A custom domain is a domain that you own, such as https://example.com, that serves your Experience Cloud sites or Salesforce Sites. An example subdomain is https://www.example.com. In this case, cookies set by Salesforce and Apex on example.com are no longer visible to www.example.com.

IP Addresses Are No Longer Allowed for Certificates

If you use A records pointing to IP addresses in your naked domain, and if you have a certificate associated with the HTTPS option, **Salesforce serves the domain over HTTPS, on Salesforce's servers, using your HTTPS certificate**, then you can no longer view or use the IPs in the Certificate and Key Management Setup page. This change is due to an ongoing migration to Salesforce Edge Network.

The Language for Enhanced Domains Was Updated

For clarity, the word "deploy" replaced "enable" in the UI and documentation when referring to the required action for enhanced domains enforcement. For example, the Enable Enhanced Domains release update was renamed to Deploy Enhanced Domains.

Other My Domain Changes

If Salesforce deploys enhanced domains with Spring '23 in your org, admins see a reminder when they log in. And My Domain settings related to redirections are grouped under Routing.

To comply with branding requirements from third parties, we changed some text on the My Domain login page. If you configured additional authentication services, such as authentication providers or certificate-based login, the page now displays *Or* instead of *Or log in using*. The login buttons for these authentication services display *Log in with*, followed by the name of the service. If you display only the standard login form on your page, there are no changes.

Deploy Enhanced Domains (Release Update)

To comply with the latest browser and security standards, enable and deploy enhanced domains. 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 deploy enhanced domains before this update is enforced. This update, originally named Enable Enhanced Domains, was first made available in Summer '21 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Winter '24. Enhanced domains are deployed for you in sandboxes and non-production orgs in Winter '23 and deployed in all orgs in Spring '23. You can postpone each of those deployments to the next release via an org-level setting.

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

When: Enhanced domains are required in all orgs in Winter '24, and orgs created in Summer '22 or later get enhanced domains 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.

Salesforce deploys enhanced domains in sandboxes and non-production orgs in Winter '23 and in all orgs in Spring '23. Non-production orgs include Developer Edition, demo, free, patch, and scratch orgs, plus Trailblazer Playgrounds. You can postpone those automatic deployments via My Domain options. In Summer '23, Salesforce deploys enhanced domains in any orgs without the feature deployed. You can disable this feature until it's enforced in Winter '24.

How: Before you update production, we recommend testing all My Domain changes in a sandbox. In Winter '23, if enhanced domains are scheduled to be automatically deployed in your org, admins see a reminder to enable this feature.

To complete this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Deploy Enhanced Domains, follow the testing and activation steps.

To postpone the automatic deployment of enhanced domains from Winter '23 to Spring '23 in a sandbox or non-production org, enable a My Domain setting before the org gets Winter '23. From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. In the Routing section of the My Domain page, click **Edit**, then select **Postpone the enforcement of enhanced domains until Spring '23**, and save your changes. Repeat this step in each sandbox or non-production org where you want to postpone the deployment. This option is unavailable after your sandbox or non-production org is on Winter '23.

To postpone the automatic deployment of enhanced domains in any org from Spring '23 to Summer '23, disable a My Domain setting before the org gets Spring '23. From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. In the Routing section of the My Domain page, click **Edit**, then deselect **Automatically deploy enhanced domains with Spring '23**, and save your changes. Repeat this step in each org where you want to postpone the deployment. This option is only available in orgs on Winter '23.

You can disable enhanced domains until they're enforced in all orgs in Winter '24.

SEE ALSO:

>   *Salesforce Help*: Enhanced Domains (can be outdated or unavailable during release preview)
>
>   *Salesforce Help*: Enhanced Domains Timeline (can be outdated or unavailable during release preview)
>
>   *Trailblazer Community Group*: My Domain and Enhanced Domains (can be outdated or unavailable during release preview)
>
>   Release Updates

Review the New Timeline for Enhanced Domains

To ensure that you have adequate time to prepare, test, and make necessary adjustments, the timeline for enhanced domains changed. Enhanced domains are still deployed for you in Spring '23, but now you can opt out of that deployment before Spring '23 and disable the feature in that release. If you haven't deployed enhanced domains before Summer '23, enhanced domains are deployed for you when you get that release. The enforcement of enhanced domains is postponed to Winter '24. With that enforcement, enhanced domains are deployed for you and can't be disabled. We continue to encourage you to deploy this high-impact feature before Salesforce deploys it for you.

Where: Enhanced domains are available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Enhanced domains are the latest version of My Domain that meets the latest browser requirements. Some browsers delayed their plans to fully block third-party cookies, allowing us to postpone the enforcement of enhanced domains. Because many browsers block third-party cookies by default, Salesforce intends to adhere to the new enforcement timeline, even if some browsers further delay their plans to fully block third-party cookies.

How: To learn about the updated timeline for these events and your options at each stage, see Enhanced Domains Timeline in Salesforce Help.

SEE ALSO:

>   Deploy Enhanced Domains (Release Update)

Identify Your Redirected My Domain Hostnames

To identify the previous My Domain hostnames that Salesforce redirects for you, enable event logging for those redirections. Redirection event information is captured in the Hostname Redirects event type. You can determine the hostnames to update and test after you deploy a My Domain change, including when you enable enhanced domains.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

SEE ALSO:

>   Log Your Redirected My Domain Hostnames

Plan for a My Domain Change

Whether you change your My Domain to adopt enhanced domains, to update your brand, or to enable partitioned domains, the URLs that Salesforce hosts for your org change. Those changes can have a large impact, and making the required updates can seem like a daunting project. To make the process as smooth as possible for you, your users, and your customers, Salesforce Help now includes guidance on planning for a My Domain Change. Review the high-level steps, recommended practices, and how to reduce the impact on your users and customers. Use example checklists to plan your project, and review expanded guidance on the updates to make after a My Domain change.

Where: My Domain is available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Plan for a My Domain Change (new)

Salesforce Help: Update Your Org for My Domain Changes (updated)

Salesforce Help: Get Your Org Status and Upcoming Maintenance Dates with My Domain (updated)

Learn More About My Domain Hostnames and Redirections

After you deploy a change to your My Domain, Salesforce redirects multiple hostnames. To help you better understand these redirections and their impact, Salesforce Help includes new and updated reference pages. The new content explains the three categories of My Domain hostname redirections, how to disable those redirections, and the redirections that stop in Winter '24. To help you determine whether a hostname is used in your org, another new Salesforce Help page documents each hostname's purpose. The documentation on the URLs to update when you enable enhanced domains now includes URL formats used before My Domain was enforced. Hostnames that are no longer in use are removed from the My Domain URL reference tables, and these tables now indicate which hostnames are reserved for future use.

Where: My Domain is available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: My Domain Redirections (can be outdated or unavailable during release preview)

Salesforce Help: My Domain Hostnames (can be outdated or unavailable during release preview)

Salesforce Help: My Domain URL Formats (can be outdated or unavailable during release preview)

Salesforce Help: My Domain URL Format Changes When You Enable Enhanced Domains (can be outdated or unavailable during release preview)

Review New Guidance on Updating Authentication After a My Domain Change

When your My Domain or site login URL changes, authentication methods such as single sign-on (SSO) and multi-factor authentication (MFA) can stop working. Minimize disruption during these changes with expanded guidance on the pre-deployment steps to preserve your admins' access. Then determine whether the change requires authentication updates, and use new instructions to work with third parties to update your authentication settings.

Where: My Domain is available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

> *Salesforce Help*: Preserve Login Access During a My Domain Login URL Change (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Update Authentication After a My Domain Change (can be outdated or unavailable during release preview)

Include the Server Name Indicator (SNI) Extension for Custom Domain Requests

If your custom domain uses your HTTPS certificate, update your API client callers to include the SNI extension. This ensures you get the correct SSL certificate for incoming custom domain requests without common name mismatch errors, which could prevent an HTTPS connection.

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

How: To determine whether this update is required, check the HTTPS Option for your custom domain. From Setup, in the Quick Find box, enter `Domains`, and then select **Domains**. Edit your domain. Take one of the following actions if this HTTPS option is selected: **Salesforce serves the domain over HTTPS on Salesforce's servers using your HTTPS certificate**.

- Update your API client callers to include the SNI extension.
- (Not recommended) If you serve your custom domain third party over a third-party CDN, update your custom domain to use the HTTPS option: A non-Salesforce host or service serves this domain over HTTPS.

SEE ALSO:

> *Knowledge Article*: Include SNI extension for custom domains using Salesforce Cloud option with Salesforce Edge Network
>
> *Salesforce Help*: Manage Your Domains (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Considerations for Salesforce Edge Network (can be outdated or unavailable during release preview)

Serve Your Custom Domain with Your Certificate in Hyperforce

Now your custom domain can use your HTTPS certificate in Hyperforce. A custom domain, such as https://www.example.com, serves your public-facing Experience Cloud sites or Salesforce Sites.

Where: This change applies to both Salesforce Classic and Lightning Experience in Professional, Enterprise, Performance, and Unlimited Editions. This feature is newly available in Hyperforce.

How: From Setup, in the Quick Find box, enter `Domains`, and then select **Domains**. When you add or edit a domain, select the HTTPS Option: **Salesforce serves the domain over HTTPS, on Salesforce's servers, using your HTTPS certificate**.

SEE ALSO:

> *Salesforce Help*: Manage Your Domains (can be outdated or unavailable during release preview)

Test Custom Domains That Use Your Certificate in a Sandbox

Test custom domains, such as https://www.example.com, that use your HTTPS certificate to serve your public-facing Experience Cloud sites or Salesforce Sites. Before you enable a new or updated custom domain in production, verify the domain in a sandbox. With this change, Custom Domains in Sandbox supports customer-owned HTTPS certificates in all orgs.

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 sandboxes.

SEE ALSO:

   Salesforce Help: Test Your Custom Domains in a Sandbox (can be outdated or unavailable during release preview)

Use Partitioned Domains in Non-Production Orgs

To maximize the availability of your orgs, My Domain uses partitioned domains for new sandboxes, Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which allows Salesforce to gradually roll out service delivery changes. To ensure continued access to all your orgs, update your allowlists for the new domains. To include your existing Developer Edition org in the Salesforce deployment schedule for that org type, enable partitioned 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: Partitioned domains are enabled by default in new Developer Edition orgs, patch orgs, scratch orgs, and Trailhead playgrounds. Sandboxes are partitioned if enhanced domains are enabled.

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.

- Developer Edition orgs: develop
- Scratch orgs: scratch
- Trailhead Playgrounds: trailblaze
- Demo orgs: demo
- Patch orgs: develop

For example, the My Domain login URL format for a partitioned Developer Edition org is
`https://`**`MyDomainName`**`.develop.my.salesforce.com`.

How: To ensure that your users can connect to partitioned domains, update your allowlists.

To partition an existing sandbox, enable enhanced domains. In existing Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds with enhanced domains, you can enable or disable this feature from the My Domain Setup page. When you change the **Use partitioned domains** option in the My Domain Details section, you can preview your new My Domain login URL at the bottom of the screen. This option becomes available in demo orgs with enhanced domains when partitioning is available for that org type.

Test Your Custom Domain Subdomains

To improve your site's security, custom domain subdomains can no longer use cookies set by the custom domain. A custom domain is a domain that you own, such as https://example.com, that serves your Experience Cloud sites or Salesforce Sites. An example subdomain is https://www.example.com. In this case, cookies set by Salesforce and Apex on example.com are no longer visible to www.example.com.

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

How: We recommend that you access your sites from your custom domain and its subdomains, then test all functionality that relies on cookies. To make a cookie available to a subdomain, use JavaScript to add a domain attribute to the cookie.

IP Addresses Are No Longer Allowed for Certificates

If you use A records pointing to IP addresses in your naked domain, and if you have a certificate associated with the HTTPS option, **Salesforce serves the domain over HTTPS, on Salesforce's servers, using your HTTPS certificate**, then you can no longer view or use the IPs in the Certificate and Key Management Setup page. This change is due to an ongoing migration to Salesforce Edge Network.

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

The Language for Enhanced Domains Was Updated

For clarity, the word "deploy" replaced "enable" in the UI and documentation when referring to the required action for enhanced domains enforcement. For example, the Enable Enhanced Domains release update was renamed to Deploy Enhanced Domains.

Where: Enhanced domains are available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. These changes are available in English only and are translated with the Spring '23 release.

Why: Adopting enhanced domains requires two steps: enabling enhanced domains and deploying the updated My Domain. This change clarifies the required action.

SEE ALSO:

Deploy Enhanced Domains (Release Update)
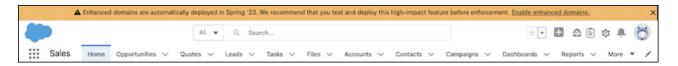
Salesforce Help: Enhanced Domains (can be outdated or unavailable during release preview)

Other My Domain Changes

If Salesforce deploys enhanced domains with Spring '23 in your org, admins see a reminder when they log in. And My Domain settings related to redirections are grouped under Routing.

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

How: If enhanced domains aren't deployed and Salesforce deploys the feature with Spring '23, admins see the banner when they log in. To close the banner in Lightning Experience, click the X. The banner is persistent in Salesforce Classic.

Under Routing on the My Domain Setup page, the Redirections section includes settings related to redirecting previous My Domain URLs. Previously, this section was called Previous force.com Site URLs, and it included only one setting.
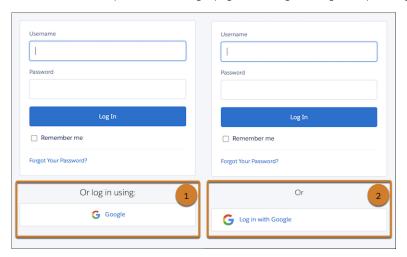
My Domain Login Page Was Changed

To comply with branding requirements from third parties, we changed some text on the My Domain login page. If you configured additional authentication services, such as authentication providers or certificate-based login, the page now displays *Or* instead of *Or log in using*. The login buttons for these authentication services display *Log in with*, followed by the name of the service. If you display only the standard login form on your page, there are no changes.

Where: My Domain is available in Lightning Experience and Salesforce Classic in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Here's an example of how the login page has changed, using a sample Google authentication provider.

- Previous display (1)
- New display (2)

SEE ALSO:

Salesforce Help: Add Identity Providers to the My Domain Login Page

Identity and Access Management

The Auto-Enable Multi-Factor Authentication (MFA) release update is available for orgs with fewer than 100 active users. You can block the OAuth user-agent flow to prevent security risks. To share information between Salesforce and third-party apps, you can set up the OAuth 2.0 client credentials flow. Beginning in November 2022, metadata API responses for authentication providers no longer include consumer secrets. As part of regular maintenance, Salesforce is upgrading its SAML framework.

IN THIS SECTION:

MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)

This release update enables multi-factor authentication (MFA) for direct logins to Salesforce. Salesforce is auto-enabling production orgs over several phases in 2023. For the first phase[*], the MFA Auto-Enablement Release Update is available in Winter '23 and activated with Spring '23. Monitor the Release Updates node in Setup to see if your org is included in this phase. Even if you're fully compliant with the MFA requirement now, you may need to complete one last step to prevent MFA-exempt user types from being affected by this release update.

Chatter Free and Chatter External Users Are Automatically Excluded from MFA Auto-Enablement and Enforcement

Salesforce users with the Chatter Free or Chatter External license are exempt from the multi-factor authentication (MFA) requirement. When the Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org setting gets turned on, either by you or by Salesforce, the setting automatically excludes these users. Keep in mind that you may need to exclude other MFA-exempt use cases on your own.

Get More Guidance from the Multi-Factor Authentication Assistant

Updates to the Multi-Factor Authentication Assistant give you the latest guidance and information. The Get Ready overview now links to a new resource that describes how and when Salesforce will auto-enable and enforce multi-factor authentication (MFA) for direct logins to Salesforce. In Roll Out, the Implement MFA section provides help with enabling built-in authenticators (in addition to the existing guidance for security keys). The Launch MFA section now addresses how to enable MFA for all users at once, as well as setting it up on a user-by-user basis.

Learn to Enable Multi-Factor Authentication with Trailhead

The new Trailhead module Quick Start: Turn On Multi-Factor Authentication (MFA) introduces MFA and ways to enable it for your users. In the first half of 2023, Salesforce is automatically enabling MFA for direct logins. To avoid disruptions when this change occurs, we recommend enabling MFA before then.

The Back Up and Restore Feature in Salesforce Authenticator Is Limited to Salesforce Users

With the updated back up and restore feature in Salesforce Authenticator, you can back up and restore your accounts only if a Salesforce account is connected to the app. Accounts that can receive in-app push notifications for multi-factor authentication (MFA) requests satisfy this requirement.

Get More from Automation in Salesforce Authenticator

You can log in to Salesforce securely and easily by automating multi-factor authentication (MFA) in Salesforce Authenticator. Based on customer feedback, we updated the app's user interface to improve the ease and reliability of the automation feature. We also added a Help article to guide you through optimizing and troubleshooting automation.

Block Connected Apps from Using the OAuth 2.0 User-Agent Flow

You can block the user-agent flow so that developers can't use it to build new integrations. Blocking this flow is likely to break mobile applications, including those developed by Salesforce such as the Salesforce mobile app and the Field Service mobile app, and is also likely to break managed packages. To avoid disruptions, audit and test your integrations before blocking a flow.

Set Up Server-to-Server Integrations with the OAuth 2.0 Client Credentials Flow

To directly share information between Salesforce and a third-party app, set up the OAuth 2.0 client credentials flow. With this flow, the third party exchanges its client credentials defined in the connected app—its consumer key and consumer secret—for an access token. Because there's no explicit user interaction in the client credentials flow, it's useful for scenarios such as running automated reports. We also recommend using this flow as a more secure alternative for the OAuth 2.0 username-password flow.

Use Alternate OAuth 2.0 Flows instead of the Username-Password Flow for Special Scenarios

The OAuth 2.0 username-password flow for special scenarios presents security risks. Client apps using the username-password flow should evaluate and move to a different flow, such as the OAuth 2.0 client credentials flow, the OAuth 2.0 JWT bearer flow, or the OAuth 2.0 web server flow.

Metadata API Responses No Longer Include Authentication Provider Consumer Secrets

Authentication provider encrypted consumer secrets no longer appear in Metadata API responses. Consumer secrets still appear in SOAP API responses by default. For security, you can exclude consumer secrets from SOAP API responses.

Upgrade SAML Single Sign-On Framework (Release Update)

Salesforce is upgrading its SAML framework as part of regular maintenance. This update can affect integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, including Identity for Employees, and Salesforce Customer Identity, including Experience Cloud. This update was first made available in Summer '22.

Benefit from Improved Performance for the Social Login Component

To improve single sign-on performance, the Social Login component in Aura and LWR sites now uses Experience Builder site URLs for authentication providers by default.

Callback URLs Using the HTTP Protocol Are Blocked

When you create or update a connected app, you can no longer enter a callback URL that begins with `http:`. Instead, for improved security, you must use the HTTPS protocol for callback URLs. If you have existing callback URLs with the HTTP protocol, they work as expected until you update your connected app configuration.

Upgrade to Identity Connect 7.1.3

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.3. Identity Connect 7.1.3 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, we recommend that you upgrade to Identity Connect 7.1.3 as soon as possible. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)

This release update enables multi-factor authentication (MFA) for direct logins to Salesforce. Salesforce is auto-enabling production orgs over several phases in 2023. For the first phase[*], the MFA Auto-Enablement Release Update is available in Winter '23 and activated with Spring '23. Monitor the Release Updates node in Setup to see if your org is included in this phase. Even if you're fully compliant with the MFA requirement now, you may need to complete one last step to prevent MFA-exempt user types from being affected by this release update.

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

When: For the first MFA auto-enablement phase, the release update is available in Winter '23 and activated when the Spring '23 release rolls out. To see if your org is included in phase one, monitor the Release Updates node in Setup. In rare cases, it can take several weeks for the update to appear after the Winter '23 release completes. For orgs not included in phase one, the MFA release update will appear in a later release.

How: This release update automatically turns on the Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org setting. Users who have the Multi-Factor Authentication for User Interface Logins user permission experience no changes.

When MFA is turned on for your org, the process for logging in to the UI changes. After a user enters their username and password, they must verify their identity with an MFA verification method, such as an authenticator app, security key, or built-in authenticator. If users haven't done so already, they're prompted to register a verification method the next time they log in after this release update goes into effect.

To prepare for this update, we recommend taking these steps.

- Verify if your org has exempt user types that need to be manually excluded from MFA before it's enabled. See Exclude Exempt Users from MFA in Salesforce Help.
- Train your users on how to acquire, register, and log in with MFA verification methods. See Change Management for a Successful MFA Rollout for guidance and customizable templates.
- Take control by enabling MFA yourself before this change goes into effect. See Enable MFA for Your Entire Org in Salesforce Help.

In the unlikely event users experience issues with MFA, temporarily disable it.

1. From Setup, in the Quick Find box, enter `Identity`, and select **Identity Verification**.

2. Deselect the **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** checkbox.

3. Save your changes.

> 📝 **Note:** When MFA is enforced for production orgs (currently targeted for the September 2023 timeframe), the option to disable MFA will be removed.

[*] Salesforce is no longer using the original criteria of orgs with fewer than 100 active users to determine the orgs that are included in the first auto-enablement phase.

SEE ALSO:

Be Ready for Multi-Factor Authentication Auto-Enablement

Salesforce MFA FAQ

Salesforce Help: Enable MFA for Direct User Logins (can be outdated or unavailable during release preview)

Chatter Free and Chatter External Users Are Automatically Excluded from MFA Auto-Enablement and Enforcement

Salesforce users with the Chatter Free or Chatter External license are exempt from the multi-factor authentication (MFA) requirement. When the Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org setting gets turned on, either by you or by Salesforce, the setting automatically excludes these users. Keep in mind that you may need to exclude other MFA-exempt use cases on your own.

SEE ALSO:

> *Salesforce Help*: Exclude Exempt Users from MFA (can be outdated or unavailable during release preview)
> Salesforce MFA FAQ

Get More Guidance from the Multi-Factor Authentication Assistant

Updates to the Multi-Factor Authentication Assistant give you the latest guidance and information. The Get Ready overview now links to a new resource that describes how and when Salesforce will auto-enable and enforce multi-factor authentication (MFA) for direct logins to Salesforce. In Roll Out, the Implement MFA section provides help with enabling built-in authenticators (in addition to the existing guidance for security keys). The Launch MFA section now addresses how to enable MFA for all users at once, as well as setting it up on a user-by-user basis.

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

When: New guidance and resources in the Multi-Factor Authentication Assistant are available for Salesforce production orgs on a rolling basis between September 9, 2022 and October 15, 2022. In sandboxes, links to new resources aren't functional until October 15, 2022.

How: In Lightning Experience, from Setup, in the Quick Find box, enter `MFA`, and then select **Multi-Factor Authentication Assistant**.

SEE ALSO:

> Be Ready for Multi-Factor Authentication Auto-Enablement

Learn to Enable Multi-Factor Authentication with Trailhead

The new Trailhead module Quick Start: Turn On Multi-Factor Authentication (MFA) introduces MFA and ways to enable it for your users. In the first half of 2023, Salesforce is automatically enabling MFA for direct logins. To avoid disruptions when this change occurs, we recommend enabling MFA before then.

SEE ALSO:

> *Trailhead*: Quick Start: Turn On Multi-Factor Authentication (MFA)
> Be Ready for Multi-Factor Authentication Auto-Enablement
> MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)

The Back Up and Restore Feature in Salesforce Authenticator Is Limited to Salesforce Users

With the updated back up and restore feature in Salesforce Authenticator, you can back up and restore your accounts only if a Salesforce account is connected to the app. Accounts that can receive in-app push notifications for multi-factor authentication (MFA) requests satisfy this requirement.

How: If you have one or more Salesforce accounts connected to the app, you can back up and restore all Salesforce Authenticator-connected accounts, including external accounts. If you have only external accounts connected, the back up and restore feature isn't available.

SEE ALSO:

   Salesforce Help: Products That Support Multi-Factor Authentication (can be outdated or unavailable during release preview)

Get More from Automation in Salesforce Authenticator

You can log in to Salesforce securely and easily by automating multi-factor authentication (MFA) in Salesforce Authenticator. Based on customer feedback, we updated the app's user interface to improve the ease and reliability of the automation feature. We also added a Help article to guide you through optimizing and troubleshooting automation.

SEE ALSO:

   Salesforce Help: Automate Multi-Factor Authentication with Salesforce Authenticator (can be outdated or unavailable during release preview)

   Salesforce Help: Optimize and Troubleshoot Automation in Salesforce Authenticator (can be outdated or unavailable during release preview)

Block Connected Apps from Using the OAuth 2.0 User-Agent Flow
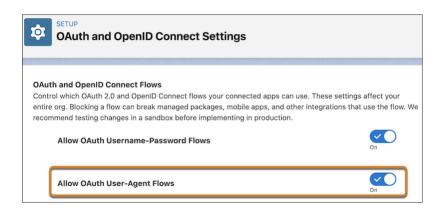
You can block the user-agent flow so that developers can't use it to build new integrations. Blocking this flow is likely to break mobile applications, including those developed by Salesforce such as the Salesforce mobile app and the Field Service mobile app, and is also likely to break managed packages. To avoid disruptions, audit and test your integrations before blocking a flow.

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

How: In OAuth and OpenID Connect Settings, deselect **Allow OAuth User-Agent Flows**.

📝 Note: The option to block the OAuth username-password flow was made available in the Summer '22 release.

SEE ALSO:

   Salesforce Help: Block OAuth 2.0 Flows to Improve Security (can be outdated or unavailable during release preview)

Set Up Server-to-Server Integrations with the OAuth 2.0 Client Credentials Flow

To directly share information between Salesforce and a third-party app, set up the OAuth 2.0 client credentials flow. With this flow, the third party exchanges its client credentials defined in the connected app—its consumer key and consumer secret—for an access token. Because there's no explicit user interaction in the client credentials flow, it's useful for scenarios such as running automated reports. We also recommend using this flow as a more secure alternative for the OAuth 2.0 username-password flow.

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

SEE ALSO:

Salesforce Help: OAuth 2.0 Client Credentials Flow for Server-to-Server Integration (can be outdated or unavailable during release preview)

Salesforce Help: Configure a Connected App for the OAuth 2.0 Client Credentials Flow (can be outdated or unavailable during release preview)

Use Alternate OAuth 2.0 Flows instead of the Username-Password Flow for Special Scenarios

The OAuth 2.0 username-password flow for special scenarios presents security risks. Client apps using the username-password flow should evaluate and move to a different flow, such as the OAuth 2.0 client credentials flow, the OAuth 2.0 JWT bearer flow, or the OAuth 2.0 web server flow.

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

SEE ALSO:

Salesforce Help: Authorize Apps with OAuth (can be outdated or unavailable during release preview)

Salesforce Help: OAuth 2.0 JWT Bearer Flow (can be outdated or unavailable during release preview)

Salesforce Help: OAuth 2.0 Web Server Flow (can be outdated or unavailable during release preview)

Metadata API Responses No Longer Include Authentication Provider Consumer Secrets

Authentication provider encrypted consumer secrets no longer appear in Metadata API responses. Consumer secrets still appear in SOAP API responses by default. For security, you can exclude consumer secrets from SOAP API responses.

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

When: Consumer secrets no longer appear in Metadata API responses starting in November 2022.

SEE ALSO:

Salesforce Help: Use Salesforce Managed Authentication Providers (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 maintenance. This update can affect integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, including Identity for Employees, and Salesforce Customer Identity, including Experience Cloud. This update was first made available in Summer '22.

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 security posture and can increase the platform's performance. Some single sign-on (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 can be affected.

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.

SEE ALSO:

> Release Updates

Benefit from Improved Performance for the Social Login Component

To improve single sign-on performance, the Social Login component in Aura and LWR sites now uses Experience Builder site URLs for authentication providers by default.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

> Enjoy Better Performance for the Social Login Component

Callback URLs Using the HTTP Protocol Are Blocked

When you create or update a connected app, you can no longer enter a callback URL that begins with `http:`. Instead, for improved security, you must use the HTTPS protocol for callback URLs. If you have existing callback URLs with the HTTP protocol, they work as expected until you update your connected app configuration.

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

How: This change doesn't apply to localhost URLs. For development purposes, localhost callback URLs continue to work as expected, and you aren't required to update them to use the HTTPS protocol when you edit a connected app.

SEE ALSO:

> Connected Apps

Upgrade to Identity Connect 7.1.3

To get the latest security enhancements, upgrade from your current version of Identity Connect to Identity Connect 7.1.3. Identity Connect 7.1.3 adds to the extensive security improvements introduced in Identity Connect 7.1.1. If you're using Identity Connect 2.1 or Identity Connect 3.0.X.X, we recommend that you upgrade to Identity Connect 7.1.3 as soon as possible. As of the Winter '22 release, you can no longer download Identity Connect 2.1 and Identity Connect 3.0.X.X.

Where: This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

How: To install Identity Connect 7.1.3, use the download link on the Identity Connect setup page. Before you upgrade from Identity Connect 2.1 or 3.0.X.X, make sure that you have the latest version of the Identity Connect managed package installed.

Privacy Center

The Preference Manager app, formerly called Preference Center, is now generally available. Customize forms made from consent templates with a new panel in Preference Builder, and easily create access tokens from the Preference Manager dashboard.

IN THIS SECTION:

Track Consent with Preference Manager (Generally Available)

The moment you've been waiting for is here—the Preference Manager app, previously called Preference Center, is now generally available. Create and publish self-service forms for your customers to define their communication preferences.

Customize Template-Based Forms in Preference Builder

Use the Properties panel in the Preference Builder feature of Preference Manager to customize forms that you create from consent templates. Edit the display text and order of elements on the form, how data is saved to consent records, and more.

Create Access Tokens from the Preference Manager Dashboard

The Preference Manager access token generator has moved. With this change, you can generate access tokens directly from the Preference Manager dashboard.

Filter Retention Policy Fields by Compliance Categorization, and Use Bulk Actions to Mask or Delete Fields

Filter fields in your retention policies by compliance categorization type so you can focus on fields that likely contain personal information. Then use the Bulk Action feature to mask or delete all fields that have the same categorization.

Mask Data in Privacy Center Policies with Static Values

Now you can set text fields to a custom, static value when you mask data in a retention policy. Use these static values for mandatory fields to indicate to your users that the data is anonymized.

Track Consent with Preference Manager (Generally Available)

The moment you've been waiting for is here—the Preference Manager app, previously called Preference Center, is now generally available. Create and publish self-service forms for your customers to define their communication preferences.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: To enable Preference Manager, contact Salesforce. Then from the App Launcher, select **Privacy Preference Manager**. From the Preference Manager dashboard, you can navigate to the Consent Templates, Preference Forms, and Access Tokens features.

SEE ALSO:

Salesforce Help: Use Preference Manager to Gather Communication Preferences (can be outdated or unavailable during release preview)
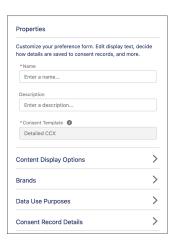
Customize Template-Based Forms in Preference Builder

Use the Properties panel in the Preference Builder feature of Preference Manager to customize forms that you create from consent templates. Edit the display text and order of elements on the form, how data is saved to consent records, and more.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: Create a preference form using an active consent template. In Preference Builder, under Properties, click each section to see the elements of the form that can be customized. Each template type has different properties to customize.

Create Access Tokens from the Preference Manager Dashboard
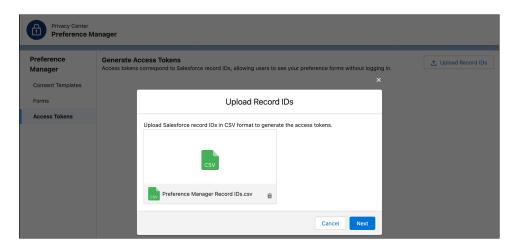
The Preference Manager access token generator has moved. With this change, you can generate access tokens directly from the Preference Manager dashboard.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: From the Preference Manager dashboard, under Preference Manager, select **Access Tokens**. Click **Upload Record IDs**, and follow the prompts to finish creating your access tokens.

Filter Retention Policy Fields by Compliance Categorization, and Use Bulk Actions to Mask or Delete Fields

Filter fields in your retention policies by compliance categorization type so you can focus on fields that likely contain personal information. Then use the Bulk Action feature to mask or delete all fields that have the same categorization.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: Create or edit a retention policy, and indicate if you want to mask or delete an object. Use the Quick Find option to search for a field, or use the Compliance Categorization option to filter by categorization type. Then you can commit a bulk action to all fields that have the same compliance categorization. The orange triangle icon next to a field indicates that it has an assigned compliance categorization.

SEE ALSO:

> *Salesforce Help*: Data Classification Metadata Fields (can be outdated or unavailable during release preview)

Mask Data in Privacy Center Policies with Static Values

Now you can set text fields to a custom, static value when you mask data in a retention policy. Use these static values for mandatory fields to indicate to your users that the data is anonymized.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: Create or edit a retention policy, and choose a field to mask. Under Action, select **Replace with Static Value**. Then under Value, enter your text, such as *REDACTED*, to indicate that the data is anonymized. This action applies to Text and Long Text fields.

Salesforce Shield

Use the Hostname Redirects event type to see which domains redirect. Monitor how Salesforce Connect adapters for Amazon Athena and Amazon DynamoDB perform. See larger, more reliable initial datasets in Event Monitoring Analytics app with the append dataset configuration enabled (beta). And now you can include encrypted fields in predictive models used by Einstein apps in Hyperforce (pilot).

IN THIS SECTION:

[Event Monitoring](#)

New event log files help you monitor event data for hostname redirects and Salesforce Connect adapters for Amazon Athena and Amazon DynamoDB. The first dataset in Event Monitoring Analytics Apps with the append dataset configuration (beta) uploads more data more reliably.

[Shield Platform Encryption](#)

Shield Platform Encryption supports more fields across Financial Services Cloud, Health Cloud, and more. Predictive models for Einstein apps in Hyperforce now support fields encrypted with Shield Platform Encryption (pilot).

Event Monitoring

New event log files help you monitor event data for hostname redirects and Salesforce Connect adapters for Amazon Athena and Amazon DynamoDB. The first dataset in Event Monitoring Analytics Apps with the append dataset configuration (beta) uploads more data more reliably.

IN THIS SECTION:

[Log Your Redirected My Domain Hostnames](#)

Determine the hostnames to update in Salesforce after you deploy a change to your My Domain. To identify the My Domain hostnames that Salesforce redirects for you, enable event logging for these redirections. Event information is captured in the Hostname Redirects event type on the Event Log File object.

[Get More Reliable Initial Datasets in the Event Monitoring Analytics App (Beta)](#)

When you create an Event Monitoring Analytics app and enable the append dataset configuration (beta), initial dataset uploads are more reliable. Your initial dataset now contains just the previous day's data. Targeted initial dataset uploads give you more reliably complete datasets that have better completion rates and fewer dropped logs.

[Get Information About Your Connections with Salesforce Connect Adapters for AWS](#)

Use the External Data Source Callout event to review the performance of Salesforce Connect adapters for Amazon DynamoDB and Amazon Athena. You can use the event log files to monitor data generated for the adapters and debug connection issues.

Log Your Redirected My Domain Hostnames

Determine the hostnames to update in Salesforce after you deploy a change to your My Domain. To identify the My Domain hostnames that Salesforce redirects for you, enable event logging for these redirections. Event information is captured in the Hostname Redirects event type on the Event Log File object.
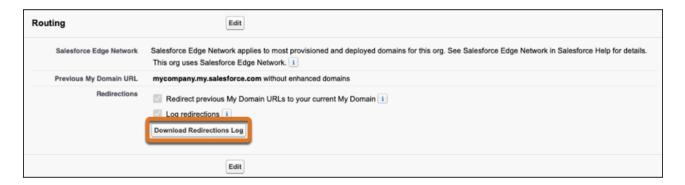
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Hostname Redirects event is available in the API but not in the Event Monitoring Analytics app. This event is free for all customers with a 24-hour data retention period.

How: First, enable redirection logging. From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. In the Routing section, click **Edit**. Select **Log Redirections**, and save your changes.

After you save your changes, Salesforce produces a log for the Hostname Redirects event type in the next daily run. Then you can access the Hostname Redirects event type through the API using a tool of your choice or from the My Domain Setup page.

Alternatively, you can download the latest incremental daily hostname redirections log by clicking Download Redirections Log from the My Domain Setup page.

SEE ALSO:

    Salesforce Help: Log Redirections for My Domain Hostnames (can be outdated or unavailable during release preview)

    Object Reference for the Salesforce Platform: Hostname Redirects Event Type (can be outdated or unavailable during release preview)

Get More Reliable Initial Datasets in the Event Monitoring Analytics App (Beta)

When you create an Event Monitoring Analytics app and enable the append dataset configuration (beta), initial dataset uploads are more reliable. Your initial dataset now contains just the previous day's data. Targeted initial dataset uploads give you more reliably complete datasets that have better completion rates and fewer dropped logs.

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

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Get Information About Your Connections with Salesforce Connect Adapters for AWS

Use the External Data Source Callout event to review the performance of Salesforce Connect adapters for Amazon DynamoDB and Amazon Athena. You can use the event log files to monitor data generated for the adapters and debug connection issues.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Shield Platform Encryption

Shield Platform Encryption supports more fields across Financial Services Cloud, Health Cloud, and more. Predictive models for Einstein apps in Hyperforce now support fields encrypted with Shield Platform Encryption (pilot).

IN THIS SECTION:

Encrypt More Insurance Policyholder Data

Insurance coverage, requires you to work with customers' personal and sensitive information. You can now encrypt sensitive and PII data entered in description fields with Shield Platform Encryption. Apply probabilistic encryption to the Event Description field on the Person Life Event object and the Milestone Description field on the Business Milestone object.

Encrypt Case Referral Details

When you refer constituents to service providers, you set up constituents for success. But making and tracking referrals also means gathering sensitive and personally identifiable information (PII). Now you can encrypt referral information and give constituent data an extra layer of protection.

Encrypt Data Shared in Video Visits

Video calls help you reach patients where and when they need you most. But sometimes patients share sensitive or personally identifiable information (PII) during video visits. Now you can encrypt health data and PII to help you address HIPPA compliance requirements.

Encrypt More Service Cloud Voice Fields

If you use Service Cloud Voice to connect with customers over voice calls, you can encrypt more of that data. Shield Platform Encryption supports the FromPhoneNumber and ToPhoneNumber fields on the VoiceCall object. You can also encrypt the MessagingPlatformKey and Name fields on the MessagingEndUser object with the case-insensitive deterministic encryption scheme.

Encrypt Participant Comments in Financial Services Cloud

Participants are an important part of your compliant data sharing plans. But sometimes sensitive or personally identifiable information (PII) about participants can be recorded in the Account Participant and Opportunity Participant comment field. Now you can encrypt comment fields on these objects to add an extra layer of protection to captured PII.

Encrypt Einstein Predictive Model Data in Hyperforce (Pilot)

When you use Einstein apps in Hyperforce, you can now use encrypted fields when you build your predictive data models. Shield Platform Encryption adds an extra layer of security and control to the data that you add to Case Classification, Case Wrap-Up, Reply Recommendation, Einstein Prediction Builder, and Einstein Recommendation Builder.

Encrypt More Insurance Policyholder Data

Insurance coverage, requires you to work with customers' personal and sensitive information. You can now encrypt sensitive and PII data entered in description fields with Shield Platform Encryption. Apply probabilistic encryption to the Event Description field on the Person Life Event object and the Milestone Description field on the Business Milestone object.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions that have Salesforce Shield or Shield Platform Encryption and Financial Services Cloud enabled.

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit**, and select a field. Milestone Description and Event Description fields support the probabilistic encryption scheme.

SEE ALSO:

   Salesforce Help: Which Standard Fields Can I Encrypt?

Encrypt Case Referral Details

When you refer constituents to service providers, you set up constituents for success. But making and tracking referrals also means gathering sensitive and personally identifiable information (PII). Now you can encrypt referral information and give constituent data an extra layer of protection.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions that have Salesforce Shield or Shield Platform Encryption and Public Sector Cloud with Case Referrals enabled.

Why: You can encrypt many fields on the Referral object. All fields support probabilistic and deterministic encryption schemes.

- Client Email
- Client Name
- Client Phone
- Name
- Provider Email
- Provider Name
- Provider Phone
- Referrer Email
- Referrer Name
- Referrer Phone

How: On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit**, and select a field.

SEE ALSO:

   Connect Referrals to Caseworkers to Speed Successful Outcomes

   Salesforce Help: Which Standard Fields Can I Encrypt?

Encrypt Data Shared in Video Visits

Video calls help you reach patients where and when they need you most. But sometimes patients share sensitive or personally identifiable information (PII) during video visits. Now you can encrypt health data and PII to help you address HIPPA compliance requirements.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions and the Health Cloud Foundation license. Access to the Video Call object requires the Health Cloud Video Calls for Experience Cloud permission set.

Why: You can encrypt these fields on the Video Call and Video Call Participant objects.

- Video Call—Description, EndDateTime, StartDateTime, VendorMeetingUuid
- Video Call Participant—Email, JoinDateTime, LeaveDateTime

Most fields support probabilistic and deterministic encryption schemes. The Email field on the Video Call Participant object only supports deterministic encryption schemes.

How: From Setup, on the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the fields that you want to encrypt.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt?

Encrypt More Service Cloud Voice Fields

If you use Service Cloud Voice to connect with customers over voice calls, you can encrypt more of that data. Shield Platform Encryption supports the FromPhoneNumber and ToPhoneNumber fields on the VoiceCall object. You can also encrypt the MessagingPlatformKey and Name fields on the MessagingEndUser object with the case-insensitive deterministic encryption scheme.

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

When: These fields' compatibility with Shield Platform Encryption is available in Summer '22 and later releases.

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 fields that you want to encrypt.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt?

Encrypt Participant Comments in Financial Services Cloud

Participants are an important part of your compliant data sharing plans. But sometimes sensitive or personally identifiable information (PII) about participants can be recorded in the Account Participant and Opportunity Participant comment field. Now you can encrypt comment fields on these objects to add an extra layer of protection to captured PII.

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 Salesforce Shield or Shield Platform Encryption add-on subscriptions and have Financial Services Cloud enabled.

How: From Setup, on the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the fields that you want to encrypt. The Comments field support probabilistic and deterministic encryption schemes.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt?

Encrypt Einstein Predictive Model Data in Hyperforce (Pilot)

When you use Einstein apps in Hyperforce, you can now use encrypted fields when you build your predictive data models. Shield Platform Encryption adds an extra layer of security and control to the data that you add to Case Classification, Case Wrap-Up, Reply Recommendation, Einstein Prediction Builder, and Einstein Recommendation Builder.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Classification apps aren't available in partner editions or Government Cloud. Encrypted field support requires either the Salesforce Shield or Shield Platform Encryption add-on subscription, and a platform upgrade.

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

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

When: Platform upgrades for Einstein start in Winter '22. To check when you're scheduled to upgrade to the enhanced platform, contact Salesforce Customer Support.

How: On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the fields that you want to encrypt. You can then add encrypted fields to your defined segment, example use cases, or fields to predict.

SEE ALSO:

Use Encrypted Fields to Build Your Einstein Model (Pilot)

Access Salesforce in More Regions with Hyperforce

Salesforce Help: How Shield Platform Encryption Works (can be outdated or unavailable during release preview)

Security Center

Create more security custom report types. Evaluate your security posture using new settings on Health Check. View who installed a package. See more information about individual tenants, including the sandbox name. And track single sign-on (SSO) and multi-factor authentication (MFA) logins to connected tenants.

IN THIS SECTION:

Create More Custom Report Types

Create a Custom Report Type for all Security Center objects to build your own reports and dashboards.

Evaluate your Security Posture using New Health Check Settings

See if your org has any at-risk security settings related to user personal identifiable information (PII) in Security Center. You can see if the "Require permission to view record names in the lookup fields" setting is enabled for your tenants.

Track SSO and MFA Logins to Connected Tenants

For security, track logins that use single sign-on (SSO) and multi-factor authentication (MFA), including who logged in to a specific tenant and how often.
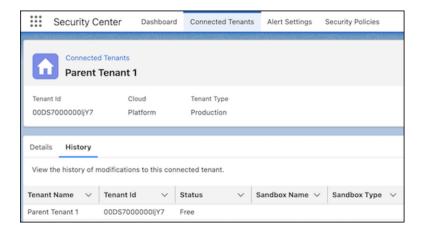
Find More Information About Individual Tenants

Access tenant details from the Connected Tenants list to see if the tenant is a parent tenant, child tenant, or unassociated with another tenant.

View Who Installed a Package

Identify who installed a package when investigating changes in a metric. Find the first and last name of the user who installed the package in the data table on the Managed Package and Unmanaged Package pages.
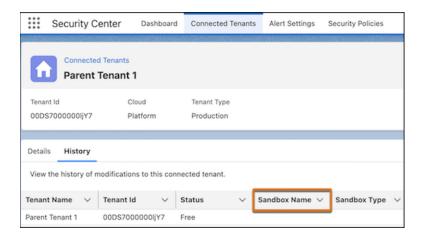
View the Sandbox Name Along with the Tenant Name

To better differentiate between connected tenants when you connect to a new sandbox, the sandbox alias is available next to the tenant name.

Create More Custom Report Types
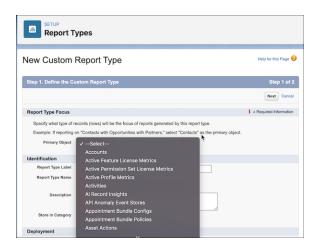
Create a Custom Report Type for all Security Center objects to build your own reports and dashboards.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center is available.

Who: This change is available to users with the Security Center add-on subscription.

How: From Setup, in the Quick Find Box, enter `Report Types`, and then select **New Custom Report Type**. Select the relevant primary object from the dropdown menu, and then finish creating your report type.

SEE ALSO:
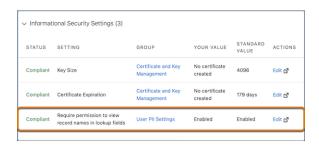
> *Salesforce Help*: Create a Custom Report Type (can be outdated or unavailable during release preview)

Evaluate your Security Posture using New Health Check Settings

See if your org has any at-risk security settings related to user personal identifiable information (PII) in Security Center. You can see if the "Require permission to view record names in the lookup fields" setting is enabled for your tenants.

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

How: From Setup, in the Quick Find box, enter `Health Check`, and then select **Informational Security Settings** to view User PII Settings.

SEE ALSO:

> *Salesforce Help*: Security Health Check (can be outdated or unavailable during release preview)

Track SSO and MFA Logins to Connected Tenants

For security, track logins that use single sign-on (SSO) and multi-factor authentication (MFA), including who logged in to a specific tenant and how often.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center is available.

Who: This change is available to users with the Security Center add-on subscription.

How: In the Security Overview panel, under Authentication, select **MFA & SSO** to open the dashboard.

SEE ALSO:

    Salesforce Help: Security Center Metrics (can be outdated or unavailable during release preview)

Find More Information About Individual Tenants

Access tenant details from the Connected Tenants list to see if the tenant is a parent tenant, child tenant, or unassociated with another tenant.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center is available.

Who: This change is available to users with the Security Center add-on subscription.

How: From your Security Center dashboard, click the Connected Tenants tab, and then click the tenant name to view tenant details.

SEE ALSO:

    Salesforce Help: Designate a Parent Tenant in Security Center (can be outdated or unavailable during release preview)

View Who Installed a Package

Identify who installed a package when investigating changes in a metric. Find the first and last name of the user who installed the package in the data table on the Managed Package and Unmanaged Package pages.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center is available.

Who: This change is available to users with the Security Center add-on subscription.

How: In the Security Overview panel, under Configuration, select the **Managed Package** and **Unmanaged Package** pages to view the relevant data tables.

View the Sandbox Name Along with the Tenant Name

To better differentiate between connected tenants when you connect to a new sandbox, the sandbox alias is available next to the tenant name.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions where Security Center is available.

Who: This change is available to users with the Security Center add-on subscription.

How: To view the sandbox's name, click the tenant name in the Connected Tenants tab, then go to the tenant history page.

Other Security Changes

Enable content sniffing protection via a release update and you can block untrusted external redirections. Take control of external authorization with a new, extensible Named Credential schema. Review new documentation about how to manage your cookies more effectively. Private Connect support for AWS integrations is available in new regions in Europe, Asia, and South America. Reprovision your inbound and outbound connections before Private Connect legacy network is retired.

IN THIS SECTION:

[Learn How to Apply the Consent Data Model to Marketing Cloud Communications](#)

When customers have preferences for how you communicate with them, you can respect those preferences with the Salesforce Consent Data Model. Set up consent management objects to capture global or granular customer preferences, and apply those preferences to communications sent with Marketing Cloud.

[Enable Content Sniffing Protection (Release Update)](#)

Help shield your org and network from malicious attacks with content sniffing protection. This change helps prevent the browser from loading scripts disguised as other file types when your users access external content and websites from Salesforce. This update was first made available in Winter '23.

Allow Redirects Only to Trusted External URLs

Protect your users from malicious links by allowing redirects only to external URLs that you trust. Previously, you could only warn users that a link redirected them outside Salesforce. This change was initially introduced in Summer '22. In Winter '23, the labels for this session setting are updated for clarity. Now the setting label is Allow redirections to untrusted external URLs, and the options are Always, With user's permission, and Block. Previously, the setting was labeled Allow redirections to, and the options were All external URLs, All external URLs with the user's permission, and Only trusted URLs.

Enhance Experience and Performance with Cloud Cookies

Manage your cookies more effectively with documentation that has more information about individual cookie classification, descriptions, and durations. Use these more detailed topics to enhance your users' experience and the performance of the Salesforce Platform and your Experience Cloud sites.

Improve Integrations with Increased Extensibility and Security for Named Credentials

Named credentials have a new, extensible infrastructure and accompanying Lightning-native setup UI. Reuse credentials across different endpoints protected by the same authentication system. Grant users explicit access to make callouts using a specified set of credentials, by linking them to a permission set. Define arbitrary name/value pairs, such as API keys, passed along with the HTTP callout as headers. Use Amazon STS to assume an IAM Role for temporary access to resources hosted on AWS. Customize user experiences with a new Connect API.

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 new regions in Europe, Asia, and South America.

Private Connect Legacy Network Is Now 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.

Host Videos from Cloudforce.com and Database.com

If your Salesforce URLs end in cloudforce.com or database.com, you can embed videos hosted in Salesforce in rich text fields.

Learn How to Apply the Consent Data Model to Marketing Cloud Communications

When customers have preferences for how you communicate with them, you can respect those preferences with the Salesforce Consent Data Model. Set up consent management objects to capture global or granular customer preferences, and apply those preferences to communications sent with Marketing Cloud.

Where: The solution kit applies to implementations with Marketing Cloud Engagement that also have Sales Cloud or Service Cloud.

How: To learn how to use the model to apply consent settings consistently across Salesforce clouds and services, read full Respect Consent Preferences in Marketing Cloud with the Consent Data Model solution kit.

Enable Content Sniffing Protection (Release Update)

Help shield your org and network from malicious attacks with content sniffing protection. This change helps prevent the browser from loading scripts disguised as other file types when your users access external content and websites from Salesforce. This update was first made available in Winter '23.

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: Content sniffing is the practice of using the content within a file to automatically determine the file's Multipurpose Internet Mail Extensions (MIME) type. This process is also called media type sniffing or MIME sniffing, and it can help websites display content with missing or incomplete metadata.

In a cross-site scripting (XSS) attack, an attacker includes malicious code in a client-side script within a legitimate web page or web application. With content sniffing, these malicious files can be misidentified and delivered to the user's browser.

When you enable content sniffing protection, the `X-Content-Type-Options: nosniff` HTTP header is added to all pages in Salesforce. This change prevents external content accessed from Salesforce from loading unless the server provides metadata for the resource.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enable Content Sniffing Protection, follow the testing and activation steps.

SEE ALSO:

> [Release Updates](#)

Allow Redirects Only to Trusted External URLs

Protect your users from malicious links by allowing redirects only to external URLs that you trust. Previously, you could only warn users that a link redirected them outside Salesforce. This change was initially introduced in Summer '22. In Winter '23, the labels for this session setting are updated for clarity. Now the setting label is Allow redirections to untrusted external URLs, and the options are Always, With user's permission, and Block. Previously, the setting was labeled Allow redirections to, and the options were All external URLs, All external URLs with the user's permission, and Only trusted URLs.

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 in the External Redirections section, for Allow redirections to untrusted external URLs, select **Never**.

SEE ALSO:

> *Salesforce Help*: Manage Redirects to External URLs (can be outdated or unavailable during release preview)

Enhance Experience and Performance with Cloud Cookies

Manage your cookies more effectively with documentation that has more information about individual cookie classification, descriptions, and durations. Use these more detailed topics to enhance your users' experience and the performance of the Salesforce Platform and your Experience Cloud sites.

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

SEE ALSO:

> *Salesforce Help*: Experience Cloud Cookies (updated) includes more cookies and updated durations (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Salesforce Platform Cookies (new) contains detailed information about cookies used in the Salesforce Platform, including their duration, classification, and description (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: User Consent Cookie (updated) includes tips for integrating with third-party products such as OneTrust (can be outdated or unavailable during release preview)
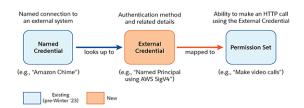
Improve Integrations with Increased Extensibility and Security for Named Credentials

Named credentials have a new, extensible infrastructure and accompanying Lightning-native setup UI. Reuse credentials across different endpoints protected by the same authentication system. Grant users explicit access to make callouts using a specified set of credentials, by linking them to a permission set. Define arbitrary name/value pairs, such as API keys, passed along with the HTTP callout as headers. Use Amazon STS to assume an IAM Role for temporary access to resources hosted on AWS. Customize user experiences with a new Connect API.

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

Why: The new named credential schema gives you much greater flexibility and control over your connections. Here are a few things to keep in mind.

- The new named credentials schema works through external credentials.

- These new capabilities are available for integrations that use OAuth or the AWS SigV4 authentication protocols, as well as custom authentication support. JWT and Basic Auth aren't supported in this release.

- Temporary access and role assumption for Amazon IAM only apply to AWS integrations, such as named credentials that use the AWS SigV4 authentication protocol.

- Private Connect isn't yet supported by this new type of named credential.

- You can still use and create legacy named credentials as before.

Connect REST API and Connect in Apex support named credentials.

SEE ALSO:

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

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 new regions in Europe, Asia, and South America.

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:

- London
- Paris
- São Paulo
- Seoul
- Singapore

- Stockholm

Private Connect Legacy Network Is Now 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.

Host Videos from Cloudforce.com and Database.com

If your Salesforce URLs end in cloudforce.com or database.com, you can embed videos hosted in Salesforce in rich text fields.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions. It also applies to Salesforce Classic in Database.com.

SEE ALSO:

Salesforce Help: Add Videos with the HTML Editor (can be outdated or unavailable during release preview)

Service

Deliver efficient, flexible service with our expanded set of Service Cloud features. Tackle customer issues as a team directly from Slack with the Service Cloud for Slack app. Enhance the Messaging for In-App and Web experience with an emoji keyboard and estimated wait time. Quantify the value of your Einstein setup with a customizable dashboard for Article Recommendations and Reply Recommendations. Include encrypted fields when you build your Case Classification model. Learn to build, launch, and extend bots in the new Learning Map. And more!

IN THIS SECTION:

Swarming

Swarming with the power of Service Cloud gives Service organizations the tools they require to collaborate at scale with experts, solve customer issues, and report on Swarming participation and impact. Tackle customer issues as a team directly from Slack with the Service Cloud for Slack app, now generally available. Reduce your time-to-swarm with an enhanced Swarming setup page. To save time, agents can now add multiple swarm members at the same time, more easily understand field names, automatically close swarms, and update swarm record names.

Channels

In Messaging for In-App and Web, agents can use the new emoji keyboard, attach files, insert quick text, and show customers their estimated wait time. Streamline productivity with the new Service Cloud Voice setup process, Amazon Connect contact center management in Salesforce, and an after conversation work timer for agents.

Cases

Generate cases from emails and assign them to the right agents with an Omni-Channel flow. Other Email-to-Case improvements prevent duplicate cases and save storage. Release updates turn on header-based threading to match replies to cases or to enable a custom No-Reply address for email notifications.

Einstein for Service

Quantify the value of your Einstein setup with a customizable value dashboard for Einstein Article Recommendations and Einstein Reply Recommendations. Deflect cases and improve case handling time by integrating Case Classification with Flows. Go from zero to bot hero with the new Einstein Bots Learning Map, and use new standard reports to get insight into bot performance.

Customer Service Incident Management

Proactively update customers and internal stakeholders about incidents by seamlessly broadcasting status updates across digital channels such as email and self-service sites.

Knowledge

See the latest version of a favorite article in your primary language when that article is updated. And, to better reflect inclusivity, some Knowledge product language was updated.

Routing

Manage routing more efficiently with Omni-Channel enhancements. Route work faster with estimated wait time for customers. Add actions to Omni Supervisor to increase supervisor efficiency and productivity. And access all Omni-Channel setup tasks and get details about all service channel instances on one page.

Feedback Management

Customize your participants' feedback experience and integrate it with basic surveys. Simplify the distribution of your surveys by using the Send Survey action on record pages. Translate matrix questions along with other content in your surveys.

Workforce Engagement

Schedule a rest period between agents' shifts and decide whether scheduling considers absences or agent working hours. Workload histories, forecasts, and capacity plans appear in a familiar time format so it's easier to grasp work volumes and staffing needs. And planners can delete job profile mappings and job profiles that they no longer use.

Verifiable Credentials Management (Pilot)

Generate verifiable credentials from Salesforce data, and enable automated verification of those credentials.

Swarming

Swarming with the power of Service Cloud gives Service organizations the tools they require to collaborate at scale with experts, solve customer issues, and report on Swarming participation and impact. Tackle customer issues as a team directly from Slack with the Service Cloud for Slack app, now generally available. Reduce your time-to-swarm with an enhanced Swarming setup page. To save time, agents can now add multiple swarm members at the same time, more easily understand field names, automatically close swarms, and update swarm record names.

IN THIS SECTION:

Swarm on Customer Issues in Slack (Generally Available)

Swarming with the power of Service Cloud gives Service organizations the tools they require to collaborate at scale with experts, solve customer issues, and report on Swarming participation and impact. Swarming gives agents the necessary tools to involve other experts and seamlessly log collaboration, participation, and ownership. So, your service team can collaborate with others to turn a new or complex issue into a closed case or incident. Agents save time and increase customer satisfaction by eliminating the need for a tiered and inefficient service model. The Service Cloud for Slack app, now generally available, includes some enhancements since the beta release.

Speed Up Your Time-to-Swarm with Guided Swarming Setup

Get your team up and swarming with the enhanced setup page. Now you can turn on swarming, give users access to objects, set up your Service Console, and configure flows, all from one place. If you use Slack as your collaboration tool, the setup takes you to the new unified Salesforce for Slack Apps setup.

Add Multiple Users to Your Swarms

Save time adding swarm members one by one as you create a swarm or after the swarm is created. Now you can add multiple users when you manually select users by name and add them all at once.

Save Time with Swarm Records That Close Automatically

Keep your teams productive with swarm and swarm member records that close when a related case or incident is closed.

Swarm on a Record Multiple Times with Overridable Swarm Record Names

Override the default swarm record name with a name that is specific to your needs or naming conventions. Your teams can more easily identify the swarm's purpose from the case or incident list view, especially if a record has multiple ongoing swarms.

Add Swarm Members More Easily with Swarm Member Details

To eliminate confusion, the Swarm Member Name field is now called Swarm Member Details. Users can more easily understand that they can include information about the swarm member or swarm and not reenter the user's name.

Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to swarm on customer issues, directly from Slack.

Swarm on Customer Issues in Slack (Generally Available)

Swarming with the power of Service Cloud gives Service organizations the tools they require to collaborate at scale with experts, solve customer issues, and report on Swarming participation and impact. Swarming gives agents the necessary tools to involve other experts and seamlessly log collaboration, participation, and ownership. So, your service team can collaborate with others to turn a new or complex issue into a closed case or incident. Agents save time and increase customer satisfaction by eliminating the need for a tiered and inefficient service model. The Service Cloud for Slack app, now generally available, includes some enhancements since the beta release.

Where: The Service Cloud for Slack app works with Service Cloud in Lightning Experience for Enterprise, Performance, Unlimited, and Developer editions. Available for use where approved by a workspace admin and installed in Slack.

When: The Service Cloud for Slack app became generally available in June 2022.

Who: Users must have a permission set with these permissions: Connect Salesforce with Slack and Slack Service User. Specific features require more permissions.

Why: This generally available version contains these changes to the beta version.

- Users can swarm multiple times on the same record.
- Service Cloud for Slack supports swarming on cases and Customer Service Incident Management objects.
- Adding members to a swarm via Expert Finder is optional.

How: To get started with the Service Cloud for Slack app, enable Slack in Lightning Experience and install the Service Cloud for Slack app in your workspace.

SEE ALSO:

Salesforce Help: Set Up Swarming User Permissions (can be outdated or unavailable during release preview)

Salesforce Help: Give Users Access to Customer Service Incident Management (can be outdated or unavailable during release preview)
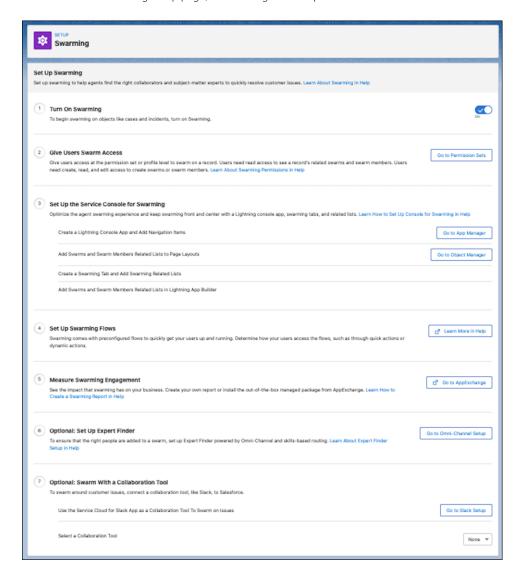
Salesforce Help: Set Up Swarming and Service Cloud for Slack App (can be outdated or unavailable during release preview)

Speed Up Your Time-to-Swarm with Guided Swarming Setup

Get your team up and swarming with the enhanced setup page. Now you can turn on swarming, give users access to objects, set up your Service Console, and configure flows, all from one place. If you use Slack as your collaboration tool, the setup takes you to the new unified Salesforce for Slack Apps setup.

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

How: From the Swarming setup page, follow the guided steps.

Add Multiple Users to Your Swarms

Save time adding swarm members one by one as you create a swarm or after the swarm is created. Now you can add multiple users when you manually select users by name and add them all at once.

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

Save Time with Swarm Records That Close Automatically

Keep your teams productive with swarm and swarm member records that close when a related case or incident is closed.

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

How: Clone and activate the Close Swarm with Related Case and Close Swarm with Related Incident record-triggered flows.

Swarm on a Record Multiple Times with Overridable Swarm Record Names

Override the default swarm record name with a name that is specific to your needs or naming conventions. Your teams can more easily identify the swarm's purpose from the case or incident list view, especially if a record has multiple ongoing swarms.

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

How: When you begin a swarm, change the swarm record name.

Add Swarm Members More Easily with Swarm Member Details

To eliminate confusion, the Swarm Member Name field is now called Swarm Member Details. Users can more easily understand that they can include information about the swarm member or swarm and not reenter the user's name.

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

Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to swarm on customer issues, directly from Slack.

Where: The Service Cloud for Slack app works with Service Cloud in Lightning Experience for Enterprise, Essentials, Performance, Unlimited, and Developer editions. Available for use where approved by a workspace admin and installed in Slack.

SEE ALSO:

Salesforce Release Notes: Service Cloud for Slack App Release Notes (can be outdated or unavailable during release preview)

Channels

In Messaging for In-App and Web, agents can use the new emoji keyboard, attach files, insert quick text, and show customers their estimated wait time. Streamline productivity with the new Service Cloud Voice setup process, Amazon Connect contact center management in Salesforce, and an after conversation work timer for agents.

IN THIS SECTION:

Messaging

Take advantage of new Messaging features with Enhanced Messaging for Facebook Messenger. Enhanced Messaging offers a suite of features including agent-to-agent transfers and new messaging session statuses that permit more sophisticated session management. Add structured content to enhanced channels with messaging components, which allow agents to share links, pinpoint a customer's problem, and find the perfect appointment time. Give agents a set amount of time to wrap up after messaging sessions with After Conversation Work. Enhance the Messaging for In-App and Web experience with an emoji keyboard, estimated wait time, quick text, new file attachment capabilities, support for additional Experience Builder templates, support for upgrading to Enhanced Domains, and more.

Voice

Set up Service Cloud Voice faster with the new, streamlined setup process. Manage Amazon Connect contact centers from Salesforce. Increase supervisor productivity with more effective backlog and queue management. Improve the agent experience with call data on more related records, after conversation work extensions, and less accidental logouts in Omni-Channel.

Embedded Service for Web

Chat supports your move to enhanced domains, which are required in sandboxes and non-production orgs in Winter '23.

Messaging

Take advantage of new Messaging features with Enhanced Messaging for Facebook Messenger. Enhanced Messaging offers a suite of features including agent-to-agent transfers and new messaging session statuses that permit more sophisticated session management. Add structured content to enhanced channels with messaging components, which allow agents to share links, pinpoint a customer's problem, and find the perfect appointment time. Give agents a set amount of time to wrap up after messaging sessions with After Conversation Work. Enhance the Messaging for In-App and Web experience with an emoji keyboard, estimated wait time, quick text, new file attachment capabilities, support for additional Experience Builder templates, support for upgrading to Enhanced Domains, and more.

IN THIS SECTION:

Get Enhanced Messaging for Facebook Messenger (Generally Available)

Try the new, improved Messaging. In enhanced Messaging channels, agents can transfer sessions to other agents and send structured content such as links and questions with options. New session statuses allow supervisors to route and track messaging sessions more intelligently.

### Gather and Share Information Faster with Messaging Components (Generally Available)

Make it easier for support agents to share links, ask questions that pinpoint a customer's problem, or schedule appointments. Create a library of user-friendly components that agents can send to customers in enhanced Facebook Messenger conversations.

Give Agents Wrap-Up Time After Messaging Sessions

Designate a set amount of time after each messaging session for agents to wrap up their work. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize their notes before moving on to the next customer. Supervisors can use Omni Supervisor and reports to track the amount of time agents spend on wrap-up work.

Modernize Communication with Emojis in Messaging for In-App and Web

Talk with your customers like you talk with your friends. Send and receive emojis in Messaging for In-App and Web.

Promote Transparency with Estimated Wait Time in Messaging for In-App and Web

Build customer trust by setting expectations. Automate telling customers how many minutes they'll wait before being connected to an agent.

Align Your Business with GDPR, SOC, and ISO Certifications

Messaging for In-App and Web makes it easy to comply with GDPR, SOC, and ISO certifications.

Get Enhanced Messaging for Facebook Messenger (Generally Available)

Try the new, improved Messaging. In enhanced Messaging channels, agents can transfer sessions to other agents and send structured content such as links and questions with options. New session statuses allow supervisors to route and track messaging sessions more intelligently.

Where: This change applies to Lightning Experience in Enterprise, and Unlimited, and Developer editions. Enhanced Messaging is available only for Facebook Messenger.

When: You can create enhanced Facebook Messenger channels starting on Nov. 15, 2022.

Why: Enhanced Messaging provides an intuitive, continuous experience for agents and customers. In enhanced Messaging channels, you can do the following.

- Create a library of interactive messaging components that agents can use to share links, ask questions that pinpoint a customer's problem, and schedule appointments.
- Let agents transfer active messaging sessions to other agents or flows.
- Use new messaging session statuses to expand your routing logic and track Facebook Messenger inquiries.

How: To create an enhanced Facebook Messenger channel, go to the Messaging Settings page in Setup and click **New Channel**. When you're prompted to select a channel type, choose **Enhanced**, and walk through the steps to set up your channel. After a channel is created, you can't change its type.

SEE ALSO:

Salesforce Help: Messaging Capabilities by Channel and Platform

Salesforce Help: Create a Facebook Messenger Channel in Messaging

Salesforce Help: Lifecycle of a Messaging Session

Salesforce Help: End or Transfer a Messaging Session
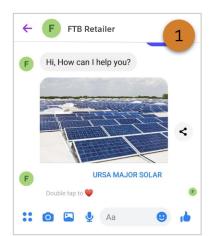
Gather and Share Information Faster with Messaging Components (Generally Available)
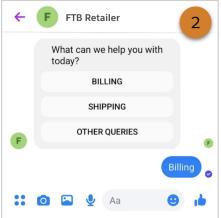
Make it easier for support agents to share links, ask questions that pinpoint a customer's problem, or schedule appointments. Create a library of user-friendly components that agents can send to customers in enhanced Facebook Messenger conversations.
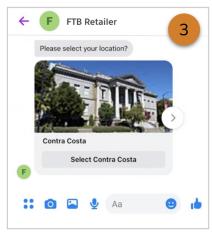
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Messaging components are supported only in enhanced Facebook Messenger channels.
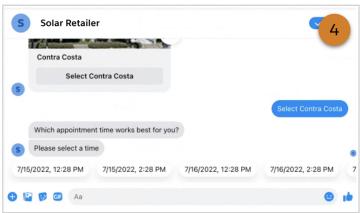
When: You can create and send messaging components starting on Nov. 15, 2022.

Why: Messaging components are available as enhanced links (1), questions with static (predefined) options (2), questions with dynamic (customer-specific) options (3), and time selectors (4). You can customize the content and format of each component.

How: Create and manage messaging components on the Messaging Components page in Setup. To let agents send components in messaging sessions, add the Messaging Components or Flow page components to the Service Console. Use filters to show these options only during enhanced Facebook Messenger sessions.

SEE ALSO:

Salesforce Help: Send Structured Content with Messaging Components

Salesforce Help: Show Messaging Components in the Service Console

Give Agents Wrap-Up Time After Messaging Sessions

Designate a set amount of time after each messaging session for agents to wrap up their work. Agents can use this After Conversation Work (ACW) time to send follow-up emails, update a case, or finalize their notes before moving on to the next customer. Supervisors can use Omni Supervisor and reports to track the amount of time agents spend on wrap-up work.

Where: This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. After Conversation Work is available in standard and enhanced Messaging channels and Messaging for In-App and Web.

How: On the Service Channels page in Setup, find your service channel for Messaging. In the After Work Configuration Time section, select **Give agents wrap-up time after conversations**, and enter a time in seconds. Then, add the After Conversation Work component to your Messaging Session Lightning record page layout.

SEE ALSO:

Salesforce Help: Configure After Conversation Work Time (can be outdated or unavailable during release preview)

Salesforce Help: Service Channel Settings (can be outdated or unavailable during release preview)

Salesforce Help: Create Service Channels (can be outdated or unavailable during release preview)

Modernize Communication with Emojis in Messaging for In-App and Web
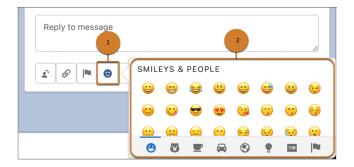
Talk with your customers like you talk with your friends. Send and receive emojis in Messaging for In-App and Web.

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.
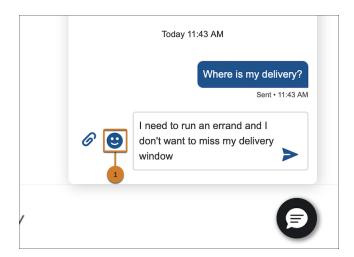
Who: Customers in Messaging for Web have access to an emoji keyboard if it's turned on by an admin or a user with the Customize Application and Modify Metadata permissions. Agents in Messaging for In-App and Web always have access to an emoji keyboard. Customers in Messaging for In-App always have access to an emoji keyboard.

How: To give customers access to the emoji keyboard in Messaging for Web, turn it on in Embedded Service Deployment Settings.

An agent sends an emoji to a customer in the messaging conversation window by clicking the Insert Emoji icon (1), and selecting an emoji from the emoji keyboard (2).

A customer sends an emoji to an agent in the messaging conversation window by clicking the Insert Emoji icon(1), and selecting an emoji from the emoji keyboard (2).

SEE ALSO:

Show Emoji Keyboard to Messaging for Web Customers

Promote Transparency with Estimated Wait Time in Messaging for In-App and Web

Build customer trust by setting expectations. Automate telling customers how many minutes they'll wait before being connected to an agent.

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.

Who: To turn on Estimated Wait Time, a user needs the Customize Application and Modify Metadata permissions.

How: Turn on Estimated Wait Time for your channel in Messaging Settings.

Estimated Wait Time works when:

- At least 10 messaging requests were accepted by agents in the last 10 minutes in the corresponding queue.
- To trigger estimated wait time when a customer creates a new messaging session, the Routing Type field for your deployment in Messaging Settings must be set to Omni-Queue or Omni-Flow with a selected flow that routes to a queue.

If Estimated Wait Time is on and the caveats are true, Estimated Wait Time appears when a customer initiates a messaging session; when an agent transfers to a flow that routes to a queue; or when a bot transfers to a flow that routes to a queue.

SEE ALSO:

Show Your Customers an Estimated Wait Time in the Messaging Conversation Window

Align Your Business with GDPR, SOC, and ISO Certifications

Messaging for In-App and Web makes it easy to comply with GDPR, SOC, and ISO certifications.

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.

SEE ALSO:

GDPR

ISO 27001

ISO 27017

ISO 27018

SOC 1

SOC 2

SOC 3
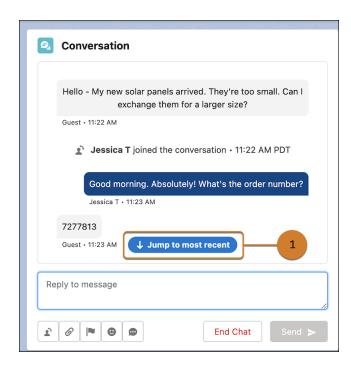
Help Agents Navigate the Messaging for In-App and Web Conversation with New Tools
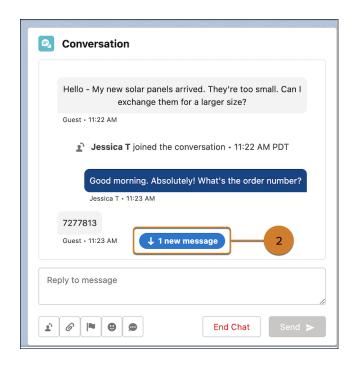
Let agents scroll through messaging for in-app and web history, and then jump to the most recent message. If a new message is received, alert the agent with a notification in the conversation window.

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.

How: These features are turned on automatically.

To return to the newest message after scrolling, an agent clicks the **Jump to most recent** (1). To view an unread customer message, an agent clicks **New Message** (2).

Respond to Customers Faster with Quick Text in Messaging for In-App and Web

Reduce agent response times and standardize your brand's voice with Quick Text. Agents can insert pre-written greetings and answers to commonly asked questions into the conversation. All Quick Text features except Folders are supported.

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.

Who: To view, create, edit, and delete quick text, agents need read, create, edit and delete permissions on the Quick Text object.

How: Quick Text is turned on automatically. Agents use the Quick Text button to insert text and create new text.

SEE ALSO:
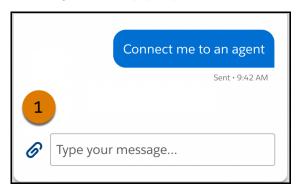
    Salesforce Help: Set Up and Use Quick Text (can be outdated or unavailable during release preview)

    Set Up and Use Quick Text

Send File Attachments with Messaging for In-App and Web
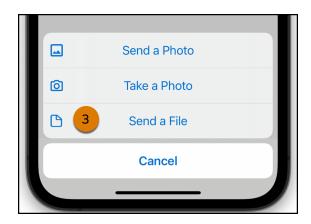
Add more context to conversations with additional file types and increased agent-side file size limits.
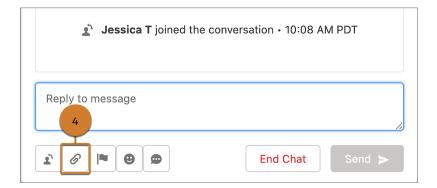
Where: This change applies to Enterprise Edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

How: Messaging for Web customers click the paperclip icon to send an attachment (1). Messaging for In-App customers tap the plus icon next to the text entry field at the bottom of the view (2), then select the desired attachment type to send (3). Messaging for In-App and Web agents click the paperclip icon in the conversation window to send an attachment (4).

Messaging for In-App and Web customers and agents can now send PDF attachments during a conversation, making it even easier to resolve your customers' issues. Previously, only image attachments were supported. Messaging for Web agents can also send .gif attachments during a conversation.

Messaging for Web customers can send attachments up to 5 MB. Messaging for In-App customers can send PDFs up to 5 MB and images of any size (which are compressed to a maximum of 5 MB). Messaging for In-App and Web customers can receive attachments up to 5 MB.

SEE ALSO:

Salesforce Help: Messaging for In-App and Web Considerations and Limitations (can be outdated or unavailable during release preview)

Considerations and Limitations for Messaging for In-App and Web

Search Message History with Messaging for In-App

Your customers can quickly find previous messages with the Messaging for In-App search feature.

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.

How: When using the UI SDK, tap the search icon in the top navigation bar. Type your search text, and then review the results. Tap a search result to jump to that part of the conversation.

Update Your URLs to Enhanced Domains in Messaging for Web

Messaging for Web supports your move to enhanced domains as long as you take specific steps. With enhanced domains, the URLs for your Salesforce org and sites change. To update your configuration with these new URLs, republish your Messaging for Web deployment. If you use Messaging for Web in an Experience Builder site, update your allowlisted URLs.

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.

Enhanced domains are required in sandboxes and non-production orgs in Winter '23. Enhanced domains are enforced in production and all other remaining orgs in Spring '23. They're also enabled by default in new, refreshed, and cloned sandboxes.

How: After enhanced domains are enabled, open your Messaging for Web deployment, and click **Publish**.

If using Messaging for Web in an Experience Builder site, take additional steps to ensure that the customer-facing messaging appears after you enable enhanced domains.

SEE ALSO:

Salesforce Help: Enable Enhanced Domains (can be outdated or unavailable during release preview)

Deploy Enhanced Domains (Release Update)

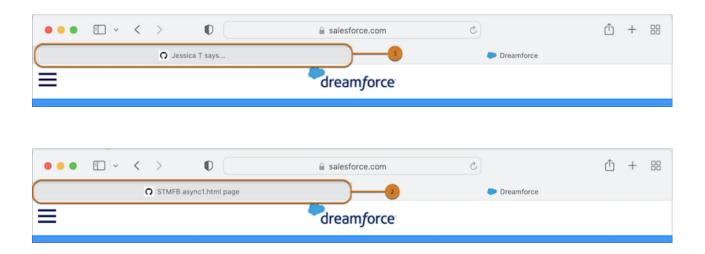Update Your Messaging for Web Deployment After Upgrading to Enhanced Domains

Help Customers Message Easier with Browser Tab Enhancements in Messaging for Web

Customers can message in more than one tab of the same website and enjoy session continuity across tabs. If a customer navigates away from the website but keeps its tab open, the tab flashes when a new message is received from an agent (1). The tab stops flashing when the customer returns to the tab (2). If the flashing tab was previously minimized, the flashing stops when the customer expands it.

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.

How: These features are turned on automatically.

Customers who navigate to another tab during the conversation see the messaging tab flash between "[Agent name] says…" and "[website name]" when a new message from an agent appears.
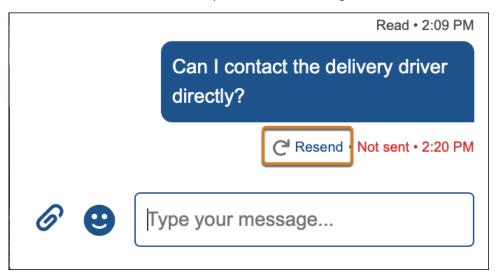
Complete the Conversation After an Outage by Resending Failed Messaging for Web Messages

A clickable resend button appears below a message that failed to send through Messaging for Web.

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.

How: This feature is turned on automatically. To resend a failed message, a customer can first fix the underlying issue, then click **Resend**.

SEE ALSO:

Salesforce Help: Messaging for In-App and Web Considerations and Limitations (can be outdated or unavailable during release preview)

Considerations and Limitations for Messaging for In-App and Web

Embed Messaging for Web in More Experience Builder Templates

Site builders using Build Your Own (LWR) and Microsite (LWR) templates can now add the Embedded Messaging component.

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.

Who: This change applies to users with Customize Application, Modify Metadata, and Create and Setup Experiences permissions.

How: The Embedded Messaging component is available automatically to site builders using Build Your Own (LWR) and Microsite (LWR) templates who follow the setup steps to embed Messaging for Web.

Get the Latest Version of Messaging for Web Automatically in Experience Builder

To allow automatic versioning of Messaging for Web in Experience Builder sites, static files are now hosted on the deployment's site endpoint. A Site Endpoint field now appears in the Embedded Messaging dropdown for Experience Builder to accommodate this.

Where: This change applies to site builders that embed messaging for web in Enterprise Edition for Service Cloud with the Digital Engagement and Messaging for In-App and Web SKUs. This change also applies to site builders who embed messaging for web in Service Cloud Unlimited and Performance editions with a Messaging for In-App and Web SKU.

Who: This change applies to users with Customize Application, Modify Metadata, and Create and Setup Experiences permissions.
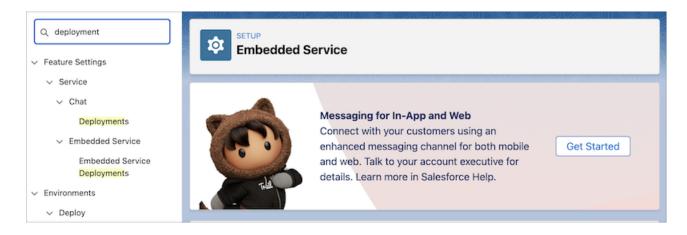
How: This change is automatically applied to Build Your Own (Aura), Customer Account Portal, Partner Central, Help Center, Customer Service, Build Your Own (LWR), and Microsite (LWR) templates.

Site developers see one option to select in the new Site Endpoint dropdown field.

Other Changes in Messaging for In-App and Web

Learn about other changes that make Messaging for In-App and Web a more effective tool.

- A welcome banner in the Embedded Service Deployments page offers resources to help you start using Messaging for In-App and Web.

- Get the latest info about adding Messaging for In-App to your mobile app with the *Messaging for In-App developer guide*.

Voice

Set up Service Cloud Voice faster with the new, streamlined setup process. Manage Amazon Connect contact centers from Salesforce. Increase supervisor productivity with more effective backlog and queue management. Improve the agent experience with call data on more related records, after conversation work extensions, and less accidental logouts in Omni-Channel.

IN THIS SECTION:

Manage Amazon Connect Queues in Salesforce (Beta)

With a few clicks in Salesforce, import Amazon Connect queues and their memberships into your contact center. To quickly adapt to changes in call volume, supervisors can reassign groups of agents to queues—all from within Omni Supervisor. Those changes are copied to Amazon Connect. To assign agents to queues in bulk, you now assign agents to groups and then assign the groups to queues.

Set and Track After Conversation Work Time (Generally Available)

Give agents a set amount of time after a customer call or messaging session to wrap up their work before they start a new one. Agents can use this time to send follow-up emails, update a case, or finalize their notes. Supervisors can use Omni Supervisor and reports to track the amount of time agents spend on wrap-up work.

Create Cases for Inbound Calls with an Omni-Channel Flow Template

Save yourself time setting up this routing logic by using the Basic Routing with Case Creation template. This template identifies the caller, routes the call to the default Basic Queue, creates a case for the call, and screen-pops the new case record when the agent accepts the call. Modify the Omni-Channel flow to change the default routing behavior, if needed.

Play Back Voicemails

Route voicemails to agents so they can follow up with customers. Agents can play voicemail recordings and read voicemail transcriptions for all voicemails routed to them.

Set IAM Permissions Boundaries Through Salesforce

Enter the AWS IAM Role Permissions Boundary Amazon Resource Name (ARN) directly through Salesforce when you set up your contact center with a new Amazon Connect instance. If a Permissions Boundary ARN is specified, its permissions boundaries are added to IAM roles as they're provisioned.

Change Availability Status During Calls

Omni-Channel presence status is no longer disabled during calls. Agents can choose when they're available and remain in sync with Amazon Connect so that calls aren't pushed to them when they're offline.

Transfer Calls More Efficiently

Get the enhanced call transfer experience. Before transferring a call, agents can gauge how busy another agent is based on their consumed capacity value. And with transferred calls added to the Omni Supervisor Queues Backlog tab, supervisors can view inbound and transferred calls that are awaiting agent pickup.

Save Time with Auto-Provisioning for Omni-Channel Contact Flows

When you create a contact center, Salesforce automatically provisions the AWS quick connect used for voice call transfers to Omni-Channel flows. The provisioned quick connect appears in the Quick Connect for Omni-Channel Flow Transfers field of the contact center details page.

Preview Calls for Outbound Campaigns with Amazon Connect

Agents can work off of a campaign list or outbound dialer where each phone number is previewed before the call is dialed or skipped. Telephony providers use the Service Cloud Voice Toolkit API to build functions that help your team contact customers with outbound dialing.

Help Agents See Call Data on More Related Records

You can add the Voice Calls related list to lead, account, and opportunity records, in addition to cases and contacts.

Prevent Accidental Logouts in Omni-Channel

To help agents avoid accidentally ending calls, a prompt now appears before they log in to Omni-Channel in a new tab or window. Previously, agents were logged out of Omni-Channel if admins didn't turn on the prompt.

Make Sure Agents Don't Miss Incoming Calls with an Orange Tab

Agents are notified of a new incoming call when the tab for a Voice 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.

Make More Calls with Service Cloud Voice

Scale your contact center's call capacity with 10,000 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.

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.

Manage Amazon Connect Queues in Salesforce (Beta)

With a few clicks in Salesforce, import Amazon Connect queues and their memberships into your contact center. To quickly adapt to changes in call volume, supervisors can reassign groups of agents to queues–all from within Omni Supervisor. Those changes are copied to Amazon Connect. To assign agents to queues in bulk, you now assign agents to groups and then assign the groups to queues.
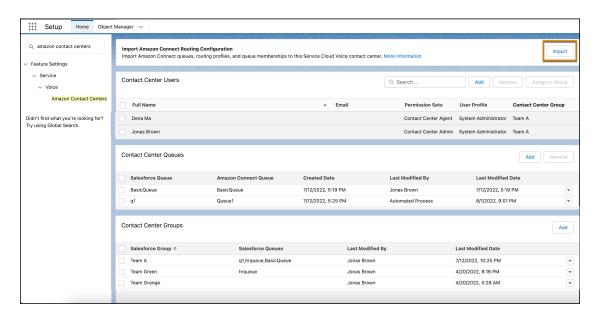
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

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 contact center details page, set up queues and groups. To replicate your Amazon Connect queues and routing configuration in Salesforce, import Amazon Connect queues, routing profiles, and queue memberships to the contact center.

SEE ALSO:

Salesforce Help: Manage Contact Center Queues for Amazon Connect (Beta) (can be outdated or unavailable during release preview)

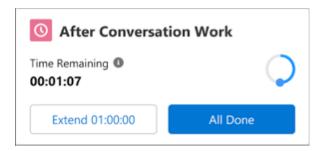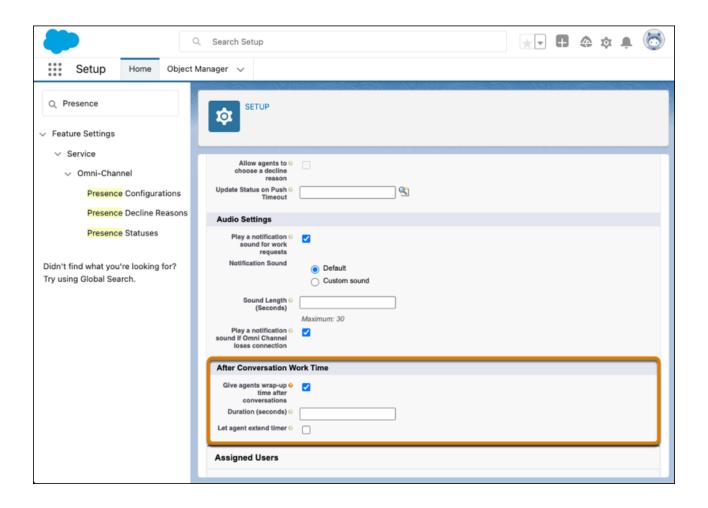## Set and Track After Conversation Work Time (Generally Available)

Give agents a set amount of time after a customer call or messaging session to wrap up their work before they start a new one. Agents can use this time to send follow-up emails, update a case, or finalize their notes. Supervisors can use Omni Supervisor and reports to track the amount of time agents spend on wrap-up work.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: When After Conversation Work (ACW) time ends, the work is considered complete regardless of whether the agent closed the record. If the agent wraps-up their work before the ACW period runs out, they can click **All Done** or close the record tab in the console to show they're ready to help the next customer. You can give agents the option to pause the ACW timer to prevent being put back into available status before completing after conversation work. You choose the time of the extension and how many times an agent can extend their ACW.

You can set up ACW in the presence configuration for a group of agents or in a service channel. ACW at the service channel level overrides the setting at the presence configuration level. In the After Conversation Work Time section, click **Give agents wrap-up time after conversations**, and add the time in seconds. The value must be from 30 to 3,600 seconds (60 minutes). Then, add the After Conversation Work component, which shows the ACW countdown, to your call or messaging home page.

SEE ALSO:

> Give Agents Wrap-Up Time After Messaging Sessions
>
> *Salesforce Help*: Configure After Conversation Work Time (can be outdated or unavailable during release preview)
>
> *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)

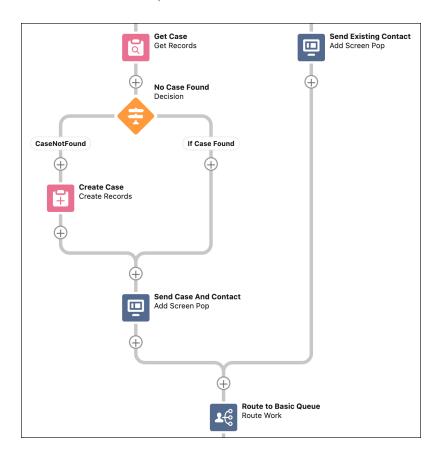## Create Cases for Inbound Calls with an Omni-Channel Flow Template

Save yourself time setting up this routing logic by using the Basic Routing with Case Creation template. This template identifies the caller, routes the call to the default Basic Queue, creates a case for the call, and screen-pops the new case record when the agent accepts the call. Modify the Omni-Channel flow to change the default routing behavior, if needed.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: To set up this feature, create an Omni-Channel flow based on the Basic Routing with Case Creation template. Then modify the underlying Amazon Connect contact flow, Sample SCV Basic Routing with Case Creation, to call the Omni-Channel flow and use the Basic Queue as the fallback queue.

SEE ALSO:

Salesforce Help: Create Cases for Inbound Calls with an Omni-Channel Flow Template (can be outdated or unavailable during release preview)
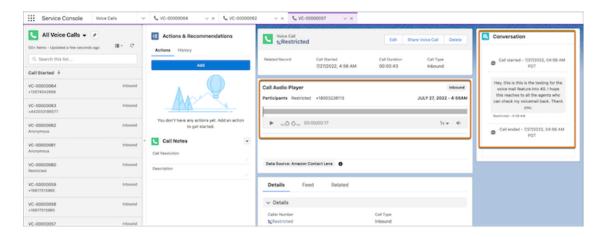
Play Back Voicemails

Route voicemails to agents so they can follow up with customers. Agents can play voicemail recordings and read voicemail transcriptions for all voicemails routed to them.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:
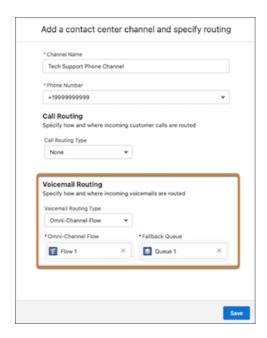
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

Why: Teams can listen to the audio recording in the Call Audio Player component and read the transcription of the recording in the Conversation component of a voice call.

How: Dynamically route voicemails by defining routing rules in the contact center channel, specifying whether incoming voicemails are routed directly to a queue or through an Omni-Channel flow. For customers using an Amazon Connect telephony provider, routing a voicemail requires contact center version 10.0 or later.

SEE ALSO:

   Salesforce Help: Update Your Contact Center

   Salesforce Help: Create a Phone Channel

   Partner Telephony Developer Guide: Send Voicemails to Agents

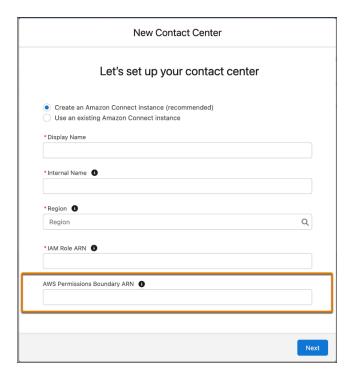## Set IAM Permissions Boundaries Through Salesforce

Enter the AWS IAM Role Permissions Boundary Amazon Resource Name (ARN) directly through Salesforce when you set up your contact center with a new Amazon Connect instance. If a Permissions Boundary ARN is specified, its permissions boundaries are added to IAM roles as they're provisioned.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model:

- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: In the AWS Permissions Boundary ARN, enter the AWS IAM Role Permissions Boundary ARN.

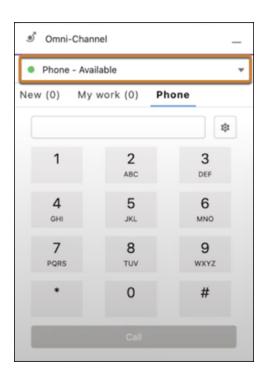## Change Availability Status During Calls

Omni-Channel presence status is no longer disabled during calls. Agents can choose when they're available and remain in sync with Amazon Connect so that calls aren't pushed to them when they're offline.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: This feature is automatically available for Amazon Connect customers. To set up for partner telephony vendors, use the Service Cloud Voice Toolkit API.

SEE ALSO:

Salesforce Help: Answer and Make Calls (can be outdated or unavailable during release preview)

Developer Guide: Service Cloud Voice Toolkit API (can be outdated or unavailable during release preview)
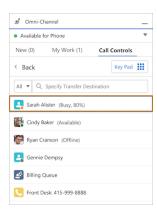
Transfer Calls More Efficiently

Get the enhanced call transfer experience. Before transferring a call, agents can gauge how busy another agent is based on their consumed capacity value. And with transferred calls added to the Omni Supervisor Queues Backlog tab, supervisors can view inbound and transferred calls that are awaiting agent pickup.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:
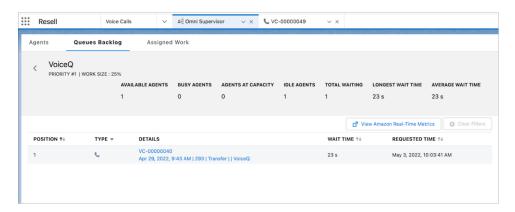
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: View an agent's consumed capacity percent value from the Phone tab of Omni-Channel. To show agent availability information for transferred calls, Salesforce users must be mapped to the telephony provider users and Respect Agent Capacity must be turned off.

View a list of inbound and transferred calls that are in queue and analyze queue data for these calls from the Omni Supervisor Queues Backlog tab.

Save Time with Auto-Provisioning for Omni-Channel Contact Flows

When you create a contact center, Salesforce automatically provisions the AWS quick connect used for voice call transfers to Omni-Channel flows. The provisioned quick connect appears in the Quick Connect for Omni-Channel Flow Transfers field of the contact center details page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect

- Service Cloud Voice with Partner Telephony

- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

Preview Calls for Outbound Campaigns with Amazon Connect

Agents can work off of a campaign list or outbound dialer where each phone number is previewed before the call is dialed or skipped. Telephony providers use the Service Cloud Voice Toolkit API to build functions that help your team contact customers with outbound dialing.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

SEE ALSO:

Developer Guide: Outbound Dialers with Service Cloud Voice for Partner Telephony (can be outdated or unavailable during release preview)

Developer Guide: Service Cloud Voice Aura Toolkit API Telephony Actions (can be outdated or unavailable during release preview)

Developer Guide: Service Cloud Voice Toolkit API (can be outdated or unavailable during release preview)

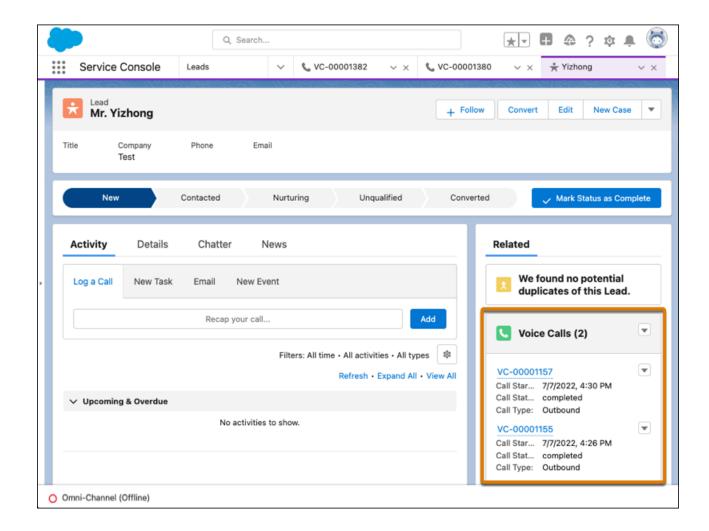## Help Agents See Call Data on More Related Records

You can add the Voice Calls related list to lead, account, and opportunity records, in addition to cases and contacts.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: Add the Voice Calls related list to page layouts on leads, accounts, and opportunities.

SEE ALSO:

Salesforce Help: Customize Related Lists (can be outdated or unavailable during release preview)

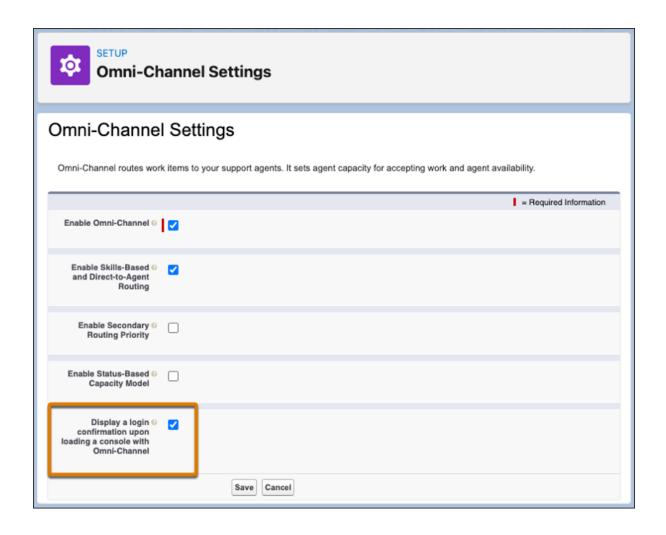## Prevent Accidental Logouts in Omni-Channel

To help agents avoid accidentally ending calls, a prompt now appears before they log in to Omni-Channel in a new tab or window. Previously, agents were logged out of Omni-Channel if admins didn't turn on the prompt.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How: In Setup, under Omni-Channel Settings, Display a login confirmation upon loading a console with Omni-Channel is selected for you.

Make Sure Agents Don't Miss Incoming Calls with an Orange Tab

Agents are notified of a new incoming call when the tab for a Voice 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.

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.

How: This feature is automatically activated.

Make More Calls with Service Cloud Voice

Scale your contact center's call capacity with 10,000 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 orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: When a contact center reaches 10,000 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)

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.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds. Service Cloud Voice with Partner Telephony is available as an add-on license for Government Cloud customers.

How:

- Send voicemails to agents using the new `callOrigin` parameter when creating or updating a call with the Telephony Integration API.
- Associate a voice call with a queue using the `queue` parameter when creating a call with the Telephony Integration API.
- Let agents extend wrap-up time after a voice call with the following fields in the PresenceUserConfig and ServiceChannel objects: `AcwExtensionDuration`, `AfterConvoWorkMaxTime`, `HasAcwExtensionEnabled`, `HasAfterConvoWorkTimer`, and `MaxExtensions`.
- Use a preview dialer in your Lightning component with the new `startPreviewCall` telephony action method when using the Aura-based Toolkit API.
- The Service Cloud Voice for Partner Telephony Developer Guide has been reorganized so that it's easier to find information. For a list of other changes to this guide, see Recent Changes to the Service Cloud Voice for Partner Telephony Developer Guide.

Embedded Service for Web

Chat supports your move to enhanced domains, which are required in sandboxes and non-production orgs in Winter '23.

IN THIS SECTION:

Update Your URLs to Enhanced Domains in Chat

Chat supports your move to enhanced domains. With enhanced domains, the URLs for your Salesforce org and sites change. Your chat deployment continues to work, but you or your customers may experience a performance lag. To eliminate this lag, republish your chat deployment.

Update Your URLs to Enhanced Domains in Chat

Chat supports your move to enhanced domains. With enhanced domains, the URLs for your Salesforce org and sites change. Your chat deployment continues to work, but you or your customers may experience a performance lag. To eliminate this lag, republish your chat deployment.

Where: This change applies to Digital Engagement for Lightning Experience in Performance, Unlimited, and Developer editions. Permissions must be enabled to access the conversation choices.

When: Enhanced domains are required in sandboxes and non-production orgs in Winter '23. Enhanced domains are enforced in production and all other remaining orgs in Spring '23. They're also enabled by default in new, refreshed, and cloned sandboxes.

How: Your chat deployment will continue to work after the switch the enhanced domains. If you notice a performance lag, republish your chat deployment.

Cases

Generate cases from emails and assign them to the right agents with an Omni-Channel flow. Other Email-to-Case improvements prevent duplicate cases and save storage. Release updates turn on header-based threading to match replies to cases or to enable a custom No-Reply address for email notifications.

IN THIS SECTION:

Direct Cases to Qualified Agents with Omni-Channel Flows

Use automation in Omni-Channel flows to route cases to the right agents. When Email-to-Case generates cases from incoming emails, your Omni-Channel flow can determine where to direct them. Previously, Omni-Channel flows didn't support case routing unless you created a record-triggered flow.

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

We now match emails to their corresponding cases using email headers. With this header-based threading approach, 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.

Other Improvements to Email-to-Case

Learn about other changes that make Email-to-Case a more effective tool for your agents.

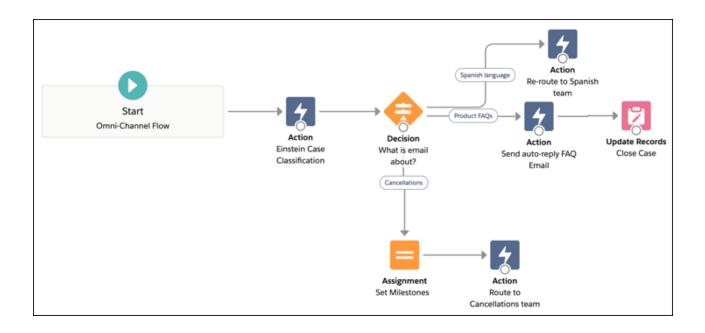## Direct Cases to Qualified Agents with Omni-Channel Flows

Use automation in Omni-Channel flows to route cases to the right agents. When Email-to-Case generates cases from incoming emails, your Omni-Channel flow can determine where to direct them. Previously, Omni-Channel flows didn't support case routing unless you created a record-triggered flow.

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

Why: For example, when customers email product questions in multiple languages, your flow can route cases to agents with the right product knowledge and language skills. It can also use Einstein Case Classification to automate case field completion or Einstein Article Recommendations to send out relevant knowledge articles.

How: After you configure Omni-Channel and create an Omni-Channel flow, in Setup, go to Email-to-Case. Create a routing address that your customers can send support emails to. Then specify the flow and a fallback queue for that address.

When a customer sends an email to the routing address, Email-to-Case creates a case if one doesn't exist. The flow executes and directs the case to the appropriate Omni-Channel queue or agent. If the flow can't determine which queue to use, it routes the case to the fallback queue.

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

We now match emails to their corresponding cases using email headers. With this header-based threading approach, 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.

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.

Other Improvements to Email-to-Case

Learn about other changes that make Email-to-Case a more effective tool for your agents.

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

Why: These improvements help your agents work smarter, save time, and conserve email storage.

- Avoid duplicate cases from Microsoft Outlook

  To help Outlook emails thread to the right cases, Email-to-Case also uses an Outlook-specific header called Thread-Index. Email-to-Case considers the first 22 bytes of this header, which uniquely identifies the thread. Using this header helps Email-to-Case find related cases instead of creating duplicates.

- Conserve email storage space

  To reduce email storage of Salesforce files, Email-to-Case can remove duplicate attachments, such as redundant email signature images. On the Email-to-Case page in Setup, turn on Eliminate Duplicate Email Attachments. When you enable the setting to save attachments as Salesforce files, Email-to-Case creates a link to a file instead of creating a duplicate.

- Take action wherever agents open case emails

  When agents read an email in the case feed or in an EmailMessage record, the email status changes from New to Read. Previously, this change invoked a trigger only if the email was opened in the case feed. To invoke triggers consistently, on the Email-to-Case page in Setup, turn on Invoke Triggers on Status Change from New to Read.

- Email-to-Case enforces the Apex 10-minute processing limit

  If your Apex custom code can't complete processing an email after 10 minutes, Email-to-Case halts the process. On request, Salesforce Customer Support can adjust this limit.

- Send outgoing emails with Apex that are ready for header-based threading

  In your Apex custom code, create RFC 2822-compliant message identifiers with the `generateThreadingMessageId(caseId)` method. When you send out case-related emails, include those identifiers in email References headers. When customers respond to your sent emails, Email-to-Case can attach their replies to the appropriate cases.

SEE ALSO:

Apex Reference Guide: generateThreadingMessageId(caseId) (can be outdated or unavailable during release preview)

Salesforce Help: Email-to-Case Threading (can be outdated or unavailable during release preview)

Einstein for Service

Quantify the value of your Einstein setup with a customizable value dashboard for Einstein Article Recommendations and Einstein Reply Recommendations. Deflect cases and improve case handling time by integrating Case Classification with Flows. Go from zero to bot hero with the new Einstein Bots Learning Map, and use new standard reports to get insight into bot performance.

IN THIS SECTION:

Einstein Classification

Include encrypted fields when you build your Case Classification model, and deflect cases and improve case handling time by integrating Case Classification with Flows.

Einstein Article Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Article Recommendations.

Einstein Reply Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Reply Recommendations, and keep your Reply Recommendations model fresh with automatic monthly retraining.

Einstein Bots

We're making it easier to learn about Einstein Bots and make smart performance decisions. Admins and developers can find everything they need to know about building, launching, and extending bots in the new Learning Map. Dig deeper into bot performance with new metric types and standard reports. Monitor your bot session use with engaged sessions.

Einstein Classification

Include encrypted fields when you build your Case Classification model, and deflect cases and improve case handling time by integrating Case Classification with Flows.

IN THIS SECTION:

Use Encrypted Fields to Build Your Einstein Model (Pilot)

Include encrypted fields when you build a predictive model for Case Classification, Case Wrap-Up, Reply Recommendation, Einstein Prediction Builder, and Einstein Recommendation Builder. Use artificial intelligence to save your agents time triaging and closing cases without compromising security.

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.

SEE ALSO:

Einstein Release Notes

Use Encrypted Fields to Build Your Einstein Model (Pilot)

Include encrypted fields when you build a predictive model for Case Classification, Case Wrap-Up, Reply Recommendation, Einstein Prediction Builder, and Einstein Recommendation Builder. Use artificial intelligence to save your agents time triaging and closing cases without compromising security.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Classification apps aren't available in partner editions or Government Cloud. Encrypted field support requires either the Salesforce Shield or Shield Platform

Encryption add-on subscription, and upgrade to Hyperforce. To learn more about Hyperforce, see Introducing Hyperforce - General Information and FAQ

This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

When: Platform upgrades for Einstein start in Winter '22. To check when you're scheduled to upgrade to the Hyperforce platform, contact Salesforce Customer Support.
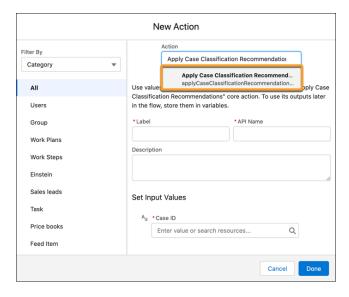
How: In Setup, select encrypted fields to add to your defined segment, example cases, or fields to predict. Encrypted fields are available only with Einstein for Service for customers who encrypt data with Shield Platform Encryption.

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!

Einstein Article Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Article Recommendations.

IN THIS SECTION:

Show your stakeholders the value of Einstein with the new Einstein Article Recommendations Value dashboard. Quickly build reports and visualizations that reveal Article Recommendations KPIs such as your most recommended articles, how agents interact with recommendations, and Article Recommendations estimated ROI. The dashboard uses agent interaction metrics and cost assumptions specific to your company to estimate savings and business value.
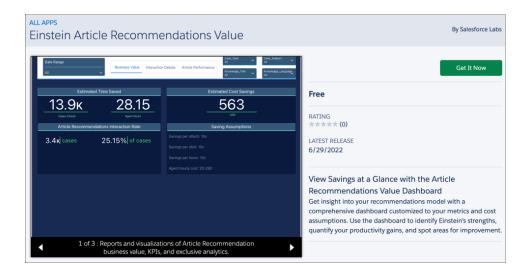
SEE ALSO:

Get Value Insights with the Einstein Article Recommendations Value Dashboard

Show your stakeholders the value of Einstein with the new Einstein Article Recommendations Value dashboard. Quickly build reports and visualizations that reveal Article Recommendations KPIs such as your most recommended articles, how agents interact with recommendations, and Article Recommendations estimated ROI. The dashboard uses agent interaction metrics and cost assumptions specific to your company to estimate savings and business value.
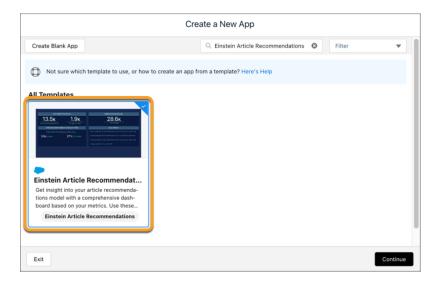
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To create and manage the Einstein Article Recommendations 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 Article Recommendations 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 Article Recommendations Value managed package from AppExchange.

To create the app, from the App Launcher, select Analytics Studio. Click **Create**, select **App**, and then search for `Einstein Article Recommendations Value`. Select the **Einstein Article Recommendations Value** dashboard app template.

To customize the app, add cost information from your company during setup.

Einstein Reply Recommendations

Quantify the value of your Einstein setup with a customizable dashboard for Einstein Reply Recommendations, and keep your Reply Recommendations model fresh with automatic monthly retraining.

IN THIS SECTION:

Show the value of Einstein to your stakeholders with the Einstein Reply Recommendations Value dashboard. Quickly build and dig into reports and visualizations for business value, how agents interact with replies, and overall reply performance. The dashboard uses chat data, agent interaction metrics, and cost assumptions specific to your company to measure Reply Recommendation's performance against your business objectives.

SEE ALSO:
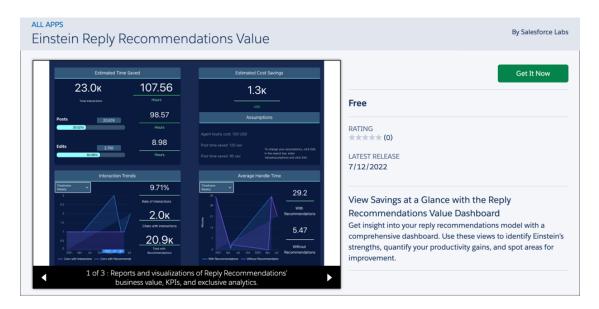
Get Value Insights with the Einstein Reply Recommendations Value Dashboard

Show the value of Einstein to your stakeholders with the Einstein Reply Recommendations Value dashboard. Quickly build and dig into reports and visualizations for business value, how agents interact with replies, and overall reply performance. The dashboard uses chat data, agent interaction metrics, and cost assumptions specific to your company to measure Reply Recommendation's performance against your business objectives.

Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic 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 Reply Recommendations 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 Reply Recommendations Value dashboard, you must have the Access Service Cloud Analytics Templates and Use Tableau CRM Templated Apps permissions.
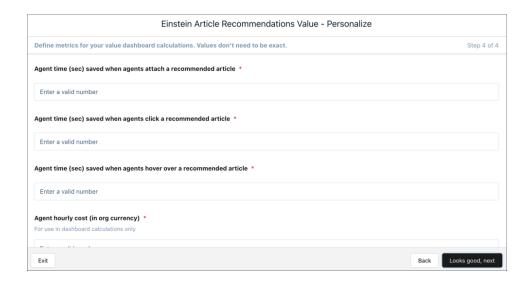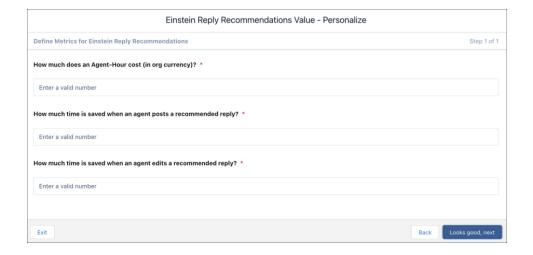
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To create the app, from the App Launcher, select Analytics Studio. Click **Create**, select **App**, and then search for `Einstein Reply Recommendations Value`. Select the **Einstein Reply Recommendations Value** dashboard app template.

To customize the app, add cost information from your company during setup.

Einstein Bots

We're making it easier to learn about Einstein Bots and make smart performance decisions. Admins and developers can find everything they need to know about building, launching, and extending bots in the new Learning Map. Dig deeper into bot performance with new metric types and standard reports. Monitor your bot session use with engaged sessions.

IN THIS SECTION:

Learn About Bots Fast with the New Learning Map

Whether you're a bot admin or a bot developer, our new learning map identifies the must-see bots content to launch your bot. This learning map guides you through every step of creating an Einstein bot: planning for bot tasks, creating or customizing your new bot, connecting to channels, and extending your bot with new channels and clouds.

Connect Enhanced Bots to Facebook Messenger (Generally Available)

Use an enhanced bot with enhanced Facebook Messenger channels, now generally available in Messaging. Seamlessly route Facebook Messenger conversations to and from an enhanced bot with Omni-Channel Flow.

Preview Your Bot with Text Preview (Generally Available)

Test and iterate on your bot before making it visible to your customers with Text Preview, now generally available. Try out a bot's messages and conversation flow as text, regardless of its activation status or connection to a channel. Text Preview is available for standard and enhanced bots. Text Preview is the only preview experience available for enhanced bots.

Einstein Bots Analytics

Get insights into bot performance with new standard reports and metric types. The Chatbot Analytics v2 dashboard has been retired.

Track Engaged Sessions in Usage-Based Entitlements

Now you can use the engaged sessions metric, introduced in Spring '22, to track your bot conversations against your monthly subscription allowance. With this change, you pay only for sessions with two-way engagement between your customer and your bot.

SEE ALSO:
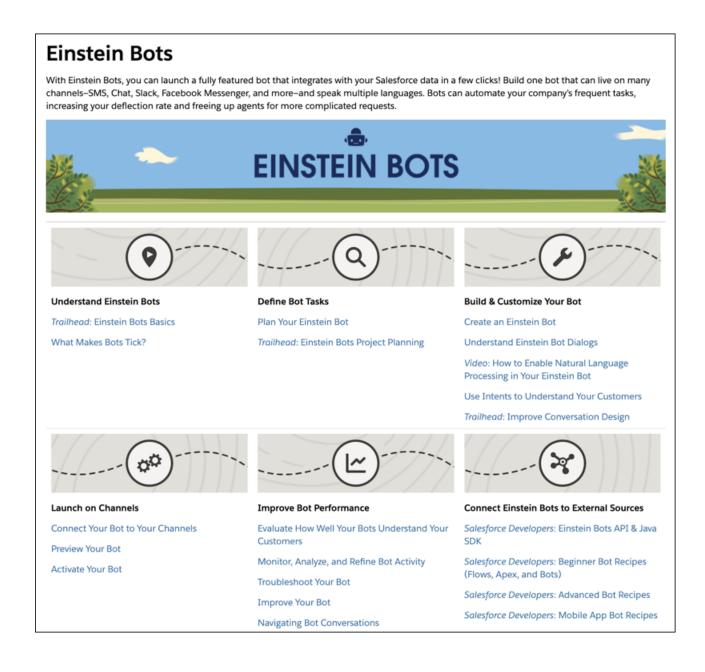
Einstein Release Notes

Learn About Bots Fast with the New Learning Map

Whether you're a bot admin or a bot developer, our new learning map identifies the must-see bots content to launch your bot. This learning map guides you through every step of creating an Einstein bot: planning for bot tasks, creating or customizing your new bot, connecting to channels, and extending your bot with new channels and clouds.

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: Click through each stage of the learning map to find the right resources, wherever you are on your bot building journey.

Einstein Bots

With Einstein Bots, you can launch a fully featured bot that integrates with your Salesforce data in a few clicks! Build one bot that can live on many channels—SMS, Chat, Slack, Facebook Messenger, and more—and speak multiple languages. Bots can automate your company's frequent tasks, increasing your deflection rate and freeing up agents for more complicated requests.

Understand Einstein Bots

Trailhead: Einstein Bots Basics

What Makes Bots Tick?

Define Bot Tasks

Plan Your Einstein Bot

Trailhead: Einstein Bots Project Planning

Build & Customize Your Bot

Create an Einstein Bot

Understand Einstein Bot Dialogs

Video: How to Enable Natural Language Processing in Your Einstein Bot

Use Intents to Understand Your Customers

Trailhead: Improve Conversation Design

Launch on Channels

Connect Your Bot to Your Channels

Preview Your Bot

Activate Your Bot

Improve Bot Performance

Evaluate How Well Your Bots Understand Your Customers

Monitor, Analyze, and Refine Bot Activity

Troubleshoot Your Bot

Improve Your Bot

Navigating Bot Conversations

Connect Einstein Bots to External Sources

Salesforce Developers: Einstein Bots API & Java SDK

Salesforce Developers: Beginner Bot Recipes (Flows, Apex, and Bots)

Salesforce Developers: Advanced Bot Recipes

Salesforce Developers: Mobile App Bot Recipes

SEE ALSO:

> *Salesforce Help*: Einstein Bots Learning Map (can be outdated or unavailable during release preview)

Connect Enhanced Bots to Facebook Messenger (Generally Available)

Use an enhanced bot with enhanced Facebook Messenger channels, now generally available in Messaging. Seamlessly route Facebook Messenger conversations to and from an enhanced bot with Omni-Channel Flow.

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 connect Enhanced Bots to Enhanced Messaging for Facebook Messenger starting on November 15, 2022.

How: Create an enhanced Facebook Messenger channel. Then add the Route Work flow action to an Omni-Channel flow to route conversations to and from an enhanced bot.

SEE ALSO:

    Get Enhanced Messaging for Facebook Messenger (Generally Available)

Preview Your Bot with Text Preview (Generally Available)

Test and iterate on your bot before making it visible to your customers with Text Preview, now generally available. Try out a bot's messages and conversation flow as text, regardless of its activation status or connection to a channel. Text Preview is available for standard and enhanced bots. Text Preview is the only preview experience available for enhanced bots.

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: In the Bot Builder, on the Dialogs tab, click **Preview**, and then select your preview experience. To preview an enhanced bot, select **Text Preview**.

SEE ALSO:

    Salesforce Help: Preview Your Bot (can be outdated or unavailable during release preview)

Einstein Bots Analytics

Get insights into bot performance with new standard reports and metric types. The Chatbot Analytics v2 dashboard has been retired.

IN THIS SECTION:

Analyze Bot Performance with New Standard Reports
It's easier to analyze bot performance right out of the box with three new metric types and seven new pre-built standard reports. Plus, a new Einstein Bot Reports Winter '23 folder includes new reports and fresh versions of existing reports, so you can take advantage of additional metric types without overwriting any of your customizations.

The Chatbot Analytics v2 Dashboard Has Been Retired
The Chatbot Analytics v2 dashboard has been retired. To get reports and visualizations for bot business value, KPIs, and analytics, download and set up the Einstein Bots Value dashboard managed package.

Analyze Bot Performance with New Standard Reports

It's easier to analyze bot performance right out of the box with three new metric types and seven new pre-built standard reports. Plus, a new Einstein Bot Reports Winter '23 folder includes new reports and fresh versions of existing reports, so you can take advantage of additional metric types 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: These new metric types are available to add to reports.

- Cancel Dialog: A user exits the current dialog and enters a new dialog without completing the original dialog or ending the conversation.
- Dialog Completed: A user completes all steps of the current dialog and enters the next dialog.
- Engaged Session Count: A count of engaged sessions across all bots in an org. In an engaged session, a user sends at least one message or clicks at least one menu option or choice.

These new reports are available in the Einstein Bot Reports Winter '23 folder.

- All and Engaged Sessions Last 30 Days: Engaged sessions vs. total bot sessions across all bots by day for the last 30 days.
- All and Engaged Sessions Today: Engaged sessions vs. total bot sessions across all bots by hour today.
- Dialogs Canceled Last 30 Days: A count of dialogs canceled by the user per bot in the last 30 days. In a canceled dialog, a user exits the current dialog and enters a new dialog without completing the original dialog or ending the conversation.
- Dialogs Canceled Today: A count of dialogs canceled by the user per bot today. In a canceled dialog, a user exits the current dialog and enters a new dialog without completing the original dialog or ending the conversation.
- Dialogs Completed Last 30 Days: A count of dialogs completed by the user per bot in the last 30 days. In a completed dialog, a user completes all steps of the current dialog and enters the next dialog.
- Dialogs Completed Today: A count of dialogs completed by the user per bot today. In a completed dialog, a user completes all steps of the current dialog and enters the next dialog.
- Engaged Session Length Last 7 Days: The average length of all engaged sessions per bot in the last 7 days. Longer session averages can indicate higher customer engagement and bot effectiveness.

How: In the App Launcher, find Reports. Under All Folders, select the **Einstein Bot Reports Winter '23** folder, which contains the latest versions of all new and existing standard bot reports. Reports in this folder have access to all standard bot reporting metric types.

> 📝 Note: We maintain legacy bot reports in their original folders so that we don't overwrite any of your customizations. These reports don't have access to the metric types added in Winter '23.

SEE ALSO:

Salesforce Help: Navigate Einstein Bot Standard Reports (can be outdated or unavailable during release preview)

The Chatbot Analytics v2 Dashboard Has Been Retired

The Chatbot Analytics v2 dashboard has been retired. To get reports and visualizations for bot business value, KPIs, and analytics, download and set up the Einstein Bots Value dashboard managed package.

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.

SEE ALSO:

Salesforce Help: View Bot Performance with CRM Analytics (can be outdated or unavailable during release preview)

AppExchange: Einstein Bots Value Dashboard

Track Engaged Sessions in Usage-Based Entitlements

Now you can use the engaged sessions metric, introduced in Spring '22, to track your bot conversations against your monthly subscription allowance. With this change, you pay only for sessions with two-way engagement between your customer and your bot.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: From Setup, find Company Information. In the Usage-based Entitlements section, you can view the Maximum Chatbot Engaged Sessions Allowed resource.

SEE ALSO:

Salesforce Help: Navigate Einstein Bot Standard Reports (can be outdated or unavailable during release preview)

Salesforce Help: Usage-Based Entitlements (can be outdated or unavailable during release preview)

Customer Service Incident Management

Proactively update customers and internal stakeholders about incidents by seamlessly broadcasting status updates across digital channels such as email and self-service sites.

IN THIS SECTION:

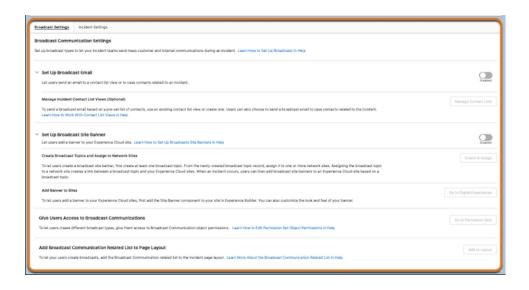Share Incident Updates with Customers at Scale with Broadcast Communications

Send mass communications to customers to keep them informed during an incident with broadcast communications. Help your incident teams send timely progress reports to impacted customers with broadcast emails available right from the incident record. Broadcast site banners help deflect customer cases by alerting authenticated or guest users of your Experience Builder sites about an ongoing incident. This saves your contact center time and maintains customer trust.

Share Incident Updates with Customers at Scale with Broadcast Communications

Send mass communications to customers to keep them informed during an incident with broadcast communications. Help your incident teams send timely progress reports to impacted customers with broadcast emails available right from the incident record. Broadcast site banners help deflect customer cases by alerting authenticated or guest users of your Experience Builder sites about an ongoing incident. This saves your contact center time and maintains customer trust.

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

How: From the Customer Service Incident Management setup page, enable and set up your broadcast types. When you create a broadcast communication, a broadcast communication and broadcast audience record are created to track, report on, and audit your incident response.

SEE ALSO:

> *Salesforce Help*: Set Up Broadcast Communications (can be outdated or unavailable during release preview)

Knowledge

See the latest version of a favorite article in your primary language when that article is updated. And, to better reflect inclusivity, some Knowledge product language was updated.

IN THIS SECTION:

Redirect Article Favorites to the Latest Versions

Mark a knowledge article as a favorite without worrying about the article version number or language. Knowledge article favorites redirect to the latest published version, regardless of which version was initially marked as a favorite or whether it was deleted. Knowledge article favorites also redirect to the version in the user's preferred language. If the knowledge article isn't translated into the user's language, it defaults to the article's primary language.

Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)

Now your service agents can find relevant articles faster and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge is now generally available.

Inclusive Language Updates

As part of our efforts to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. APIs aren't included because changing terms in our code can break current implementations.

Redirect Article Favorites to the Latest Versions

Mark a knowledge article as a favorite without worrying about the article version number or language. Knowledge article favorites redirect to the latest published version, regardless of which version was initially marked as a favorite or whether it was deleted. Knowledge article favorites also redirect to the version in the user's preferred language. If the knowledge article isn't translated into the user's language, it defaults to the article's primary language.
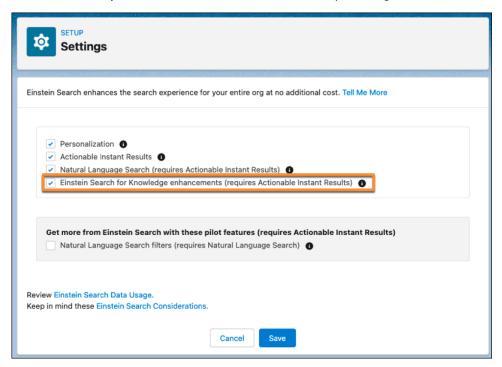
Where: This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)

Now your service agents can find relevant articles faster and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge is now generally available.

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

How: From Setup, in the Quick Find box, enter `Einstein Search`, and then select **Settings**. Turn on **Einstein Search for Knowledge enhancements (requires Actionable Instant Results)**, and save your changes.

SEE ALSO:

  Boost Agent Productivity with Einstein Search for Knowledge (Generally Available)

Inclusive Language Updates

As part of our efforts to refine language in our products to more accurately reflect inclusivity, Salesforce is replacing terms deemed noninclusive. APIs aren't included because changing terms in our code can break current implementations.

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

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

How: To learn more about terms that are changing, see How we're bringing inclusive language to our products and Salesforce updates technical language in ongoing effort to address implicit bias.

Routing

Manage routing more efficiently with Omni-Channel enhancements. Route work faster with estimated wait time for customers. Add actions to Omni Supervisor to increase supervisor efficiency and productivity. And access all Omni-Channel setup tasks and get details about all service channel instances on one page.

IN THIS SECTION:

Route Work Faster with Estimated Wait Time for Customers

To improve the customer experience, notify customers how long they must wait to speak to an agent. By knowing the estimated wait time, customers can make informed decisions about whether to contact your organization at a different time or use a different service channel. For example, if the wait time for a call is too long and the issue isn't urgent, the customer can send an email instead.

Access All Omni-Channel Setup Tasks from One Page

Less searching in Setup, more doing. To learn more about what Omni-Channel components to set up and get a list of all setup tasks, go to the new Omni-Channel setup home. The setup home also provides warnings when items aren't correctly configured. On that page, you can also view details about and click a link to access every service channel instance defined for your company.

Manage Your Contact Center Efficiently with More Omni Supervisor Actions

Make your supervisors' jobs easier by adding custom actions to Omni Supervisor. Actions can call screen flows that let supervisors perform tasks such as sending a Slack message to your agents, reassigning work in a queue, or assigning an agent to a different shift.

Update Queue Assignments on the Fly

To quickly respond to an overflowing queue in the contact center, a supervisor can reassign agents and groups to queues in Omni Supervisor. To assign agents to queues in bulk, assign agents to groups and then assign the groups to queues.

Improve Contact Center Operations with Efficient Shift Scheduling

Assign agents where and when they're needed so that customers receive the best support possible from your teams. Shift scheduling includes tools so that your planners can match agents to work shifts effortlessly based on scheduling rules, constraints, and business objectives.
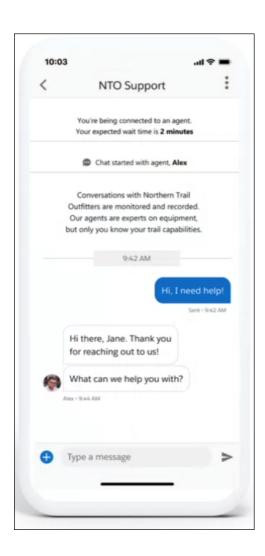
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Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Professional, and Developer editions.

Why: You can also shorten the agent response time using an Omni-Channel flow that routes customers based on the estimated wait time. For instance, if Agent A is estimated to take longer to respond, then route the customer to Agent B.

How: Set up estimated wait time for calls in a phone channel or messages in a Messaging for In-App and Web channel.

To route work based on the estimated wait time, output the time in a Check Availability for Routing action of an Omni-Channel flow, and use that output as input for the routing logic in a Route Work action.
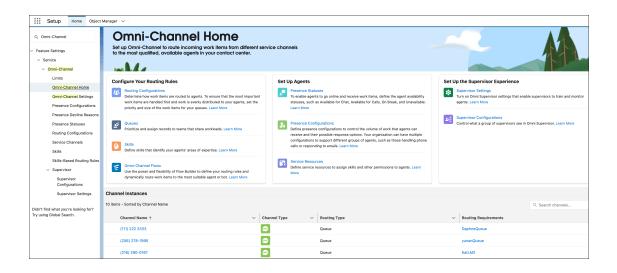
SEE ALSO:

Salesforce Help: Make Smarter Decisions by Checking Agent Availability (can be outdated or unavailable during release preview)

Access All Omni-Channel Setup Tasks from One Page

Less searching in Setup, more doing. To learn more about what Omni-Channel components to set up and get a list of all setup tasks, go to the new Omni-Channel setup home. The setup home also provides warnings when items aren't correctly configured. On that page, you can also view details about and click a link to access every service channel instance defined for your company.

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

How: To view Omni-Channel Home, select **Omni-Channel Home** in Setup.

SEE ALSO:

    Salesforce Help: Access Omni-Channel Setup Home (can be outdated or unavailable during release preview)

Manage Your Contact Center Efficiently with More Omni Supervisor Actions

Make your supervisors' jobs easier by adding custom actions to Omni Supervisor. Actions can call screen flows that let supervisors perform tasks such as sending a Slack message to your agents, reassigning work in a queue, or assigning an agent to a different shift.

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

How: Create a screen flow that takes a list of record IDs as input. Then, in a supervisor configuration, specify which custom actions to show on each Omni Supervisor tab. This example shows the Send SMS and Send Slack Message custom actions on the Agents tab.

SEE ALSO:

    Salesforce Help: Setting Up Custom Actions on Omni Supervisor Tabs (can be outdated or unavailable during release preview)

Update Queue Assignments on the Fly

To quickly respond to an overflowing queue in the contact center, a supervisor can reassign agents and groups to queues in Omni Supervisor. To assign agents to queues in bulk, assign agents to groups and then assign the groups to queues.

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

How: In the Queues tab of Omni Supervisor, select the queues, and then click **Assign Agents**.

Improve Contact Center Operations with Efficient Shift Scheduling

Assign agents where and when they're needed so that customers receive the best support possible from your teams. Shift scheduling includes tools so that your planners can match agents to work shifts effortlessly based on scheduling rules, constraints, and business objectives.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Shift Scheduling is available for an additional cost as an add-on license or as a part of Workforce Engagement.

Who: Users with the Shift Scheduling Planner permission set can view, create, and edit shifts and shift schedules and can use the scheduling tools to match agents to shifts. Users with the Shift Scheduling Agent permission set can view their shift assignments.

How: After you set up Salesforce for Shift Scheduling, your planners define the criteria for scheduling decisions, such as Match Territory and Match Skills scheduling rules. Your planners then create shifts to represent the locations and types of work to be done. They can then use the scheduling tools to match agents to shifts.

For example, if you need agents who speak Spanish to handle calls weekdays from 8:00 AM to 5:00 PM, your planners create shifts for those days and times. The shifts use a job profile that specifies Voice and Spanish skills. Your planner can then use the tools—mass shift update, batch assign, or get candidates—to find agents in the right location who have those skills.

SEE ALSO:

> *Salesforce Help*: Shift Scheduling (can be outdated or unavailable during release preview)
>
> *Salesforce Help*: Shift Scheduling Considerations (can be outdated or unavailable during release preview)
>
> *Salesforce Video*: Put the Right Agents on the Right Shifts at the Right Time with Shift Scheduling

Feedback Management

Customize your participants' feedback experience and integrate it with basic surveys. Simplify the distribution of your surveys by using the Send Survey action on record pages. Translate matrix questions along with other content in your surveys.

IN THIS SECTION:

Design Your Own Survey UI Experience

Integrate surveys into your existing app's business flow by building your own survey UI. Create a basic survey and then use the survey details that the Survey Response Connect API generates to build your custom UI. You can collect survey responses from the custom UI using the same API.

Simplify Survey Distribution by Sending Surveys From Record Pages

Use the Send Survey action to easily send a quick pulse or relationship survey to gauge customer or employee satisfaction. With the action, going to Survey Builder isn't the only way to send surveys. Users can send survey email invitations from any object's record pages.

Translate Matrix Questions in Your Surveys

Provide a consistent experience to your global audiences by translating matrix questions along with the other content in your surveys.

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.

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Design Your Own Survey UI Experience

Integrate surveys into your existing app's business flow by building your own survey UI. Create a basic survey and then use the survey details that the Survey Response Connect API generates to build your custom UI. You can collect survey responses from the custom UI using the same API.

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

Who: The ability to create basic surveys is available with the Salesforce Feedback Management Starter or Growth license.

How: To create a basic survey, on the Surveys tab, click **New**, and then select **Basic Survey**.

SEE ALSO:

    Salesforce Help: Create a Basic Survey (can be outdated or unavailable during release preview)
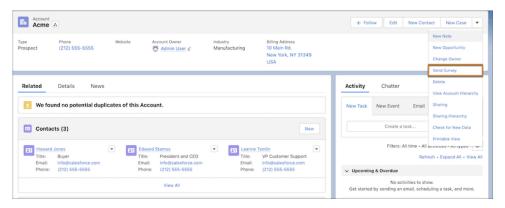
Simplify Survey Distribution by Sending Surveys From Record Pages

Use the Send Survey action to easily send a quick pulse or relationship survey to gauge customer or employee satisfaction. With the action, going to Survey Builder isn't the only way to send surveys. Users can send survey email invitations from any object's record pages.

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

Who: The Send Survey action is available with the Salesforce Feedback Management Starter or Growth license.

How: Add the Send Survey action to the page layout of any standard or custom object. Then, click **Send Survey** to send survey email invitations from the object's record pages to individuals related to the record.

SEE ALSO:

    Salesforce Help: Send Survey Invitations by Email From Record Pages (can be outdated or unavailable during release preview)
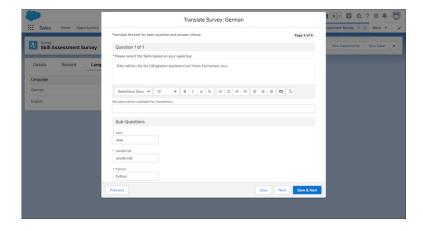
Translate Matrix Questions in Your Surveys

Provide a consistent experience to your global audiences by translating matrix questions along with the other content in your surveys.

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

Who: The ability to translate matrix questions is available with the Salesforce Feedback Management Starter or Growth license, and the required Translation Workbench permission.

How: On the record page of the survey with matrix questions that you want to translate, go to the Languages tab. Next to the language, click **Translate**.

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.

Workforce Engagement

Schedule a rest period between agents' shifts and decide whether scheduling considers absences or agent working hours. Workload histories, forecasts, and capacity plans appear in a familiar time format so it's easier to grasp work volumes and staffing needs. And planners can delete job profile mappings and job profiles that they no longer use.

IN THIS SECTION:

Give Agents Time Off Between Shifts

Help your agents rest and recharge between shift assignments. Create a Rest Time in Minutes scheduling rule so that agents get downtime between consecutive shifts.

Schedule the Right Agents with Availability Rule Options

Find agents for shift assignments using rules that flex to match your scheduling practices. When identifying agents for shift assignments, choose whether to consider agent absences and working hours.

Plan Staffing in Familiar Time Zone Formats

To understand workload and staffing needs quickly, view workload histories, forecasts, and capacity plans in your contact centers' time zones. Instead of showing time values in UTC (Coordinated Universal Time), Workforce Engagement uses the time zone of the workload history's service territory. For example, if you're in London but manage a center in Chicago, select that center's service territory so that data views are in the time zone for Chicago.

Declutter Job Profiles and Job Profile Mappings

Delete job profiles and job-profile-to-queue mappings that you no longer use. Previously you couldn't delete them.

Give Agents Time Off Between Shifts

Help your agents rest and recharge between shift assignments. Create a Rest Time in Minutes scheduling rule so that agents get downtime between consecutive 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 or Admin permission sets can view, create, and edit scheduling rules and scheduling constraints.

How: In Setup, create the scheduling rule and specify the Rest Time in Minutes scheduling constraint. Then define that scheduling constraint with the minimum rest period in minutes.

SEE ALSO:

Salesforce Help: Create a Scheduling Rule for Workforce Engagement (can be outdated or unavailable during release preview)

Salesforce Help: Create Scheduling Constraints for Workforce Engagement (can be outdated or unavailable during release preview)
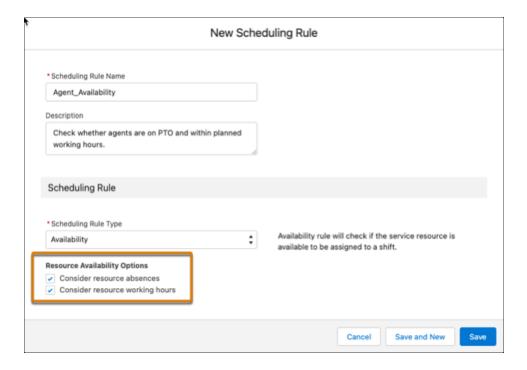
Schedule the Right Agents with Availability Rule Options

Find agents for shift assignments using rules that flex to match your scheduling practices. When identifying agents for shift assignments, choose whether to consider agent absences and working hours.

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 or Admin permission sets can view, create, and edit scheduling rules.

How: In Setup, create an Availability scheduling rule in Workforce Engagement. Then select whether your rule takes resource absences or agents' working hours into account.

Plan Staffing in Familiar Time Zone Formats

To understand workload and staffing needs quickly, view workload histories, forecasts, and capacity plans in your contact centers' time zones. Instead of showing time values in UTC (Coordinated Universal Time), Workforce Engagement uses the time zone of the workload history's service territory. For example, if you're in London but manage a center in Chicago, select that center's service territory so that data views are in the time zone for Chicago.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Workforce Engagement is available for an additional cost as an add-on license.

Who: Users with the Workforce Engagement Analyst or Planner permission sets can view, create, and edit workload histories, forecasts, and capacity plans.

How: When you create a workload history, select a service territory. Workforce Engagement uses that territory's time zone in data views for the workload history and its related forecast and capacity plan.

Previously created workload histories, forecasts, and capacity plans still show data views in UTC. Because those workload histories don't reference a service territory, you can't create forecasts from them. Similarly, when forecasts don't have an associated service territory, you can't use them to create capacity plans.

Declutter Job Profiles and Job Profile Mappings

Delete job profiles and job-profile-to-queue mappings that you no longer use. Previously you couldn't delete them.

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 or Admin permission sets can view, create, edit, and delete job profiles. In an Omni-Channel queue-based routing workflow, users with the Workforce Engagement Planner or Admin permission set can also view, create, edit, and delete job profile mappings.

How: Delete job profiles from a Job Profiles related list or record page. If you use an Omni queue-based workflow, you can delete job profile-to-queue mappings from the Settings: Workforce Engagement tab. If you delete a job profile that's used in a mapping, it deletes the mapping also.

When you delete a mapping that's used in a capacity plan, the plan still shows data for other job profile-to-queue mappings.

SEE ALSO:

Salesforce Help: Map Job Profiles to Queues (can be outdated or unavailable during release preview)

Verifiable Credentials Management (Pilot)

Generate verifiable credentials from Salesforce data, and enable automated verification of those credentials.

IN THIS SECTION:

Generate and Issue Verifiable Credentials and Authentic Data
Pull data from Salesforce records into Verifiable Credentials Management and generate cryptographically signed credentials that are tamper-evident, verifiable, and trusted.

Generate and Issue Verifiable Credentials and Authentic Data

Pull data from Salesforce records into Verifiable Credentials Management and generate cryptographically signed credentials that are tamper-evident, verifiable, and trusted.

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

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

Why: Companies that use VCM can optimize their issuing and verification processes.

Verifiable credentials are digital, signed versions of the physical credentials, documents, diplomas, licenses, or certifications issued to individuals by various companies and institutions. Verifiable credentials create a verifiable link between the issuing party and the subject or holder of the credential.

With VCM, an issuing entity can generate authentic, standardized digital credentials for claims that they sign cryptographically and issue to individuals. The issuer's digital signature (think of it as a digital watermark) enables verifiers to validate the origins and authenticity of the credential through cryptography and public key infrastructure when presented with the credential.
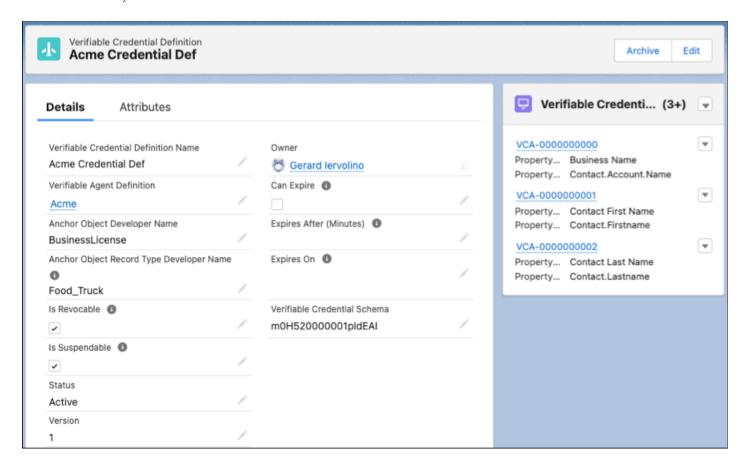
Businesses that are responsible for verifying credentials originating outside their own trust domain can run a digital verification against the credential to ensure that the contents haven't been tampered with and that the issuer is trusted. Verifiers can then use the contents of the credential as input to their business processes.

How: A VCM administrator first creates verifiable agent definitions and Verifiable Credential Definitions.

The output of a verifiable agent definition contains a Decentralized Identifier (DID) document for the organization that issues the verifiable credential. The DID document defines the public keys, authentication protocols, and service endpoints that enable cryptographically verifiable interactions with the issuing organization.

A VCM administrator creates credential templates called verifiable credential definitions, which include verifiable credential attributes (the objects and fields in the Salesforce database) that provide source data for the verifiable credential. Verifiable credential definitions pull data in from multiple object records. These templates are reusable, allowing your company to issue multiple credentials based on the same data structure.

After creating verifiable agent and verifiable credential definitions, VCM users can launch a Lightning Flow to generate verifiable credentials. The Lightning Flow gathers the data values from the verifiable credential definition in standard format and digitally signs the credential to ensure authenticity.

The VCM pilot includes a verification service, which allows anyone with access to the credential's verification QR Code or verification URL to view the results of verification.

If you're interested in participating in the Verifiable Credentials Management pilot program, ask your Salesforce account executive.

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

See the Work.com release notes for the latest updates: Work.com Release Notes

Other Salesforce Products and Services

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

Customer Success Group

Salesforce Customer Success gives every customer access to resources and expertise from the world's most extensive success ecosystem. From easy-to-use resources to embedded solution experts, we help you create your own path to success. With each release, we introduce new and better ways to help you see results from all your Salesforce products. Highlights for this Winter '23 release include:

- Signature Success Plan: new Proactive Monitoring alerts, onboarding enhancements, and more
- Premier Success Plan: Guided Onboarding for Service Cloud, Platform and Account Engagement, Expert Coaching enhancements, and more
- Salesforce Help: Support Bot, Channel Recommendations, and more

Get to know Success Plans by visiting our overview page or taking the Salesforce Success Plans Trailhead module. Or experience the enhancements for yourself by visiting the Success Center at 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 Trailhead learning content you love—including the 1000+ badges of marketable skills—right from the palm of your hand. And with the Trailhead GO compatible filter you can focus on learning content that is best completed on a mobile device. Learn relevant skills, collaborate with Trailblazers, and give back to the Community in Trailhead GO. View top contributors in the Trailblazer Community and climb the ranks yourself with the answers leaderboard. And now it's easier than ever to get the content you need with a customizable feed, topic recommendations, and Community Group improvements.

Trailhead GO supports eight languages and is available on iPhone, iPad, and Android devices.

- Android: Trailhead GO at Google Play
- iOS: Trailhead GO at the App Store

Release Updates

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

Every time a release update is created, it gets scheduled to be enforced in a future release. We announce each update and its schedule here as soon as that schedule is known, but occasionally, updates are postponed or canceled. If that happens, we let you know in the section that describes that specific release update.

Often, release updates provide a Test Run so you can enable an update and examine any changes to your org, including changes to customizations, before that update's Complete Steps By date.

To view release updates, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**.

Enforced with This Release

These updates are scheduled to be enforced this release.

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 and is enforced in Winter '23.

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.

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 Winter '23.

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. You can no longer assign guest users permission sets or permission set groups that are associated with permission set licenses that contain the restricted permissions. The only standard object permissions allowed for guest users are read and create. This update was first available in Spring '22 and is enforced in Winter '23.

Automatically Enabled in This Release

The features related to these updates are scheduled to be automatically enabled, but not enforced, in this release. The list can include new, previously announced, and previously postponed release updates. You can disable the behavior for the indicated release updates until their enforcement date.

Deploy Enhanced Domains (Release Update)

To comply with the latest browser and security standards, enable and deploy enhanced domains. 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 deploy enhanced domains before this update is enforced. This update, originally named Enable Enhanced Domains, was first made available in Summer '21 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Winter '24. Enhanced domains are deployed for you in sandboxes and non-production orgs in Winter '23 and deployed in all orgs in Spring '23. You can postpone each of those deployments to the next release via an org-level setting.

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.

Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)

This update restricts users' access to navigation menus in the Experience Cloud sites that they're a member of. This change improves site security by enforcing existing user access permissions when you use an Apex controller in a custom component to query the NavigationLinkSet or NavigationMenuItem objects. Navigation menus that are queried using Connect APIs already enforce user access permissions and are therefore unaffected by this change. This update was first available in Winter '23.

Enable Content Sniffing Protection (Release Update)

Help shield your org and network from malicious attacks with content sniffing protection. This change helps prevent the browser from loading scripts disguised as other file types when your users access external content and websites from Salesforce. This update was first made available in Winter '23.

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 and was scheduled to be enforced in Winter '23, but we postponed the enforcement date to Spring '23.

Escape the Label Attribute of <apex:inputField> Elements to Prevent Cross-Site Scripting in Visualforce Pages (Release Update)

To prevent malicious code from executing in cross-site scripting (XSS) attacks on your Visualforce pages, this release update escapes the label attribute of your `<apex:inputField>` tags. This update was first available 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 available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Spring '23.

Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)

In Winter '22, Salesforce discontinued the Run Flows permission for the Guest User profile 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. In Spring '23, Salesforce removes Run Flows from the Guest User profile in all orgs. 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.

Upgrade SAML Single Sign-On Framework (Release Update)

Salesforce is upgrading its SAML framework as part of regular maintenance. This update can affect integrations with third-party systems, such as integrations with SAML identity providers and SAML-enabled applications. This update applies to all SAML-based integrations, including Identity for Employees, and Salesforce Customer Identity, including Experience Cloud. This update was first made available in Summer '22.

Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)

Configure a default No-Reply address from the Organization-Wide Addresses page from setup. Add an email address in Special Purpose Organization-Wide Email Addresses, then follow the steps outlined in the verification email sent to the new default No-Reply address. After you verify your default No-Reply address, set up and start the Test Run in the Release Update. This update was first made available in Spring '21 and was scheduled to be enforced in Spring '22, but we postponed the enforcement date to Spring '23.

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

With this update, a flow that runs via REST API uses the running user's profile and permission sets to determine the object permissions and field-level access of the flow. This update was first made available in Spring '22.

Scheduled to Be Automatically Enabled in Spring '23

The features related to these updates are scheduled to be automatically enabled, but not enforced, in Spring '23. The list can include new, previously announced, and previously postponed release updates. You can disable the behavior for the indicated release updates until their enforcement date.

MFA To Be Auto-Enabled for Some Customers in Spring '23 (Release Update)

This release update enables multi-factor authentication (MFA) for direct logins to Salesforce. Salesforce is auto-enabling production orgs over several phases in 2023. For the first phase[*], the MFA Auto-Enablement Release Update is available in Winter '23 and activated with Spring '23. Monitor the Release Updates node in Setup to see if your org is included in this phase. Even if you're fully compliant with the MFA requirement now, you may need to complete one last step to prevent MFA-exempt user types from being affected by this release update.

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.

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at runtime. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the screen. A user was able to employ the session ID to bypass security controls.

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

We now match emails to their corresponding cases using email headers. With this header-based threading approach, new outbound emails don't contain a Ref ID. This update was first made available in Winter '21.

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.

Enable Sharing for Flow Orchestration Objects (Release Update)

After Enable Sharing for Flow Orchestration Objects is selected, the Manage Flow user permission no longer grants users access to Flow Orchestration objects. The Manage Orchestration Runs and Work Items user permission plus sharing rules and role hierarchies control user access to Flow Orchestration objects. Users who run orchestrations and execute work items must still have the Run Flows user permission.

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.

Prevent Guest User from Editing or Deleting Approval Requests (Release Update)

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests.

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

This update disables the requirement for a user running a flow to have explicit access to Apex classes invoked by that flow. This update was first made available in Summer '20 and was scheduled to be enforced in Spring '23, but we postponed the enforcement date to Summer '23.

Scheduled to Be Enforced in Winter '24

These updates are scheduled to be enforced in Winter '24. The list can include new, previously announced, and previously postponed 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 available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first available in Winter '23.

Scheduled to Be Enforced in Spring '24

These updates are scheduled to be enforced in Spring '24. The list can include new, previously announced, and previously postponed release updates.

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.

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.

Validate Getter and Setter Access Modifier Enforcement during Visualforce Expression Language Parsing (Release Update)

This release update has been postponed indefinitely and is not enforced in its present form. It has no customer impact, even if it's enabled.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.